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Vessels Arrive at Top China Ports with Shorter Delays in 2019

香港航運七十年

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Vessels Arrive at Top China Ports with Shorter Delays in 2019

Port performance improves for inbound vessels at Shanghai, Shenzhen, and Ningbo-Zhoushan

Christine Deihl / Victor Ho / Mikki Yuen

China Opens Its Market to Expand Import Trade

China has been actively opening up its market to the world to encourage imports. China is the second largest importer in the world, it imported goods valued over USD1.84 trillion in 2018. During the year, the top 5 China import partners by import value were the European Union, ASEAN, South Korea, Japan, and Taiwan. While many of China's top 10 imports by value include bulk and specialized freight, they also include commodities that are shipped by containerized freight such as integrated circuits, phone system devices, soybeans, and liquid crystal, laser, and optical tools.

Ports Play a Key Role in Trade Flows

As companies increase containerized shipments to China, it is critical that China's port infrastructure smoothly handle incoming vessels to facilitate trade flows. Port congestion and delayed vessels can cause downstream impacts on cargo reaching its final destination in China. Knowing average delay times and trends in delays can help shippers plan and help carriers and terminals optimize their operations to improve the flow of cargo.

Key Findings for Shanghai, Shenzhen, and Ningbo-Zhoushan Ports

- Arrival delays have been much shortened in 2019 than in 2018
- Shenzhen had the shortest arrival delays compared to the other two ports
- Ningbo-Zhoushan experienced a spike in delays over the last three years in April, likely due to dense fog

Import-focused Study Spanned 29 Terminals at 3 China Ports

We conducted a study leveraging CargoSmart's Global Vessel Voyage Monitoring Center to analyze the number of ocean container vessel arrivals and the extent of vessel arrival delays at the top 3 China ports over the past three years.

We reviewed 27 ocean container carriers' published schedules that covered 29 container terminals at the ports of Shanghai, Shenzhen, and Ningbo-Zhoushan for the analysis. We then compared vessels' estimated times of arrival (ETAs) from the sailing schedules with actual times of arrival detected through the Automatic Identification System (AIS).

Majority of Vessels Were Not Delayed or Delayed Under 24 Hours

First, we reviewed the overall number of vessel arrivals and the extent of vessel arrival delays at the three ports from January through September 2019. Shanghai had the most vessel arrivals with 13,647 vessels visiting the port in our study, followed by Shenzhen with 12,007, and Ningbo-Zhoushan with 6,639. Shenzhen's vessel arrival numbers are high compared to Ningbo-Zhoushan in part due to Shenzhen handling a large number of feeder vessels for domestic freight.

Next, we reviewed the vessels by the extent of their delays. Vessels that are more than a day late can impact arrival planning for shippers, consignees, and logistics service providers. If you know about delays in advance, you can manage the changes and reschedule truckers that pick up cargo, labor at warehouses, and production at factories. If you are not aware of the delays in advance, each day of delay can add significant costs to supply chains.

Overall, we found that the majority of delays at the three ports were delayed under 24 hours from the original ETA. This was the case for 61% of vessel arrivals at Shanghai, 76% of the vessel arrivals at Shenzhen, and 63% of the vessel arrivals at Ningbo-Zhoushan.

CargoSmart.ai

Vessel Arrivals (January to September 2019)

	Shanghai		Shenzhen		Ningbo-Zhoushan	
Number of vessel arrivals	13,647		12,007		6,639	
Vessel arrivals (early, or delayed < 12 hours)	5,863	43%	7,087	59%	2,957	45%
Vessel arrivals (delayed > 12 hours and < 24 hours)	2,520	18%	2,093	17%	1,222	18%
Vessel arrivals (delayed > 24 hours)	5,264	39%	2,827	24%	2,460	37%

Shenzhen Had Most Vessel Arrivals On-Time and Delayed Under 12 Hours

For the first nine months of 2019, 39% of the vessels visiting Shanghai arrived more than a day after its original ETA. 18% of its vessels arrived between 12 and 24 hours after their original ETAs. And, 43% arrived early or under 12 hours delayed from their original ETAs. Shanghai had the highest percentage of lengthy vessel delays and the smallest percentage of short or not delayed vessel arrivals.

Shenzhen had the greatest percentage of early or under 12 hours delayed vessel arrivals among the three ports for the first nine months of 2019. It had the lowest percentage of vessels among the ports of delays more than a day late.

Ningbo-Zhoushan, the port with the fewest vessel arrivals among the three ports, had a similar performance as Shanghai. 45% of vessel arrivals arrived early or fewer than 12 hours delayed from the original ETA. And, 37% of vessels arrived more than a day late.

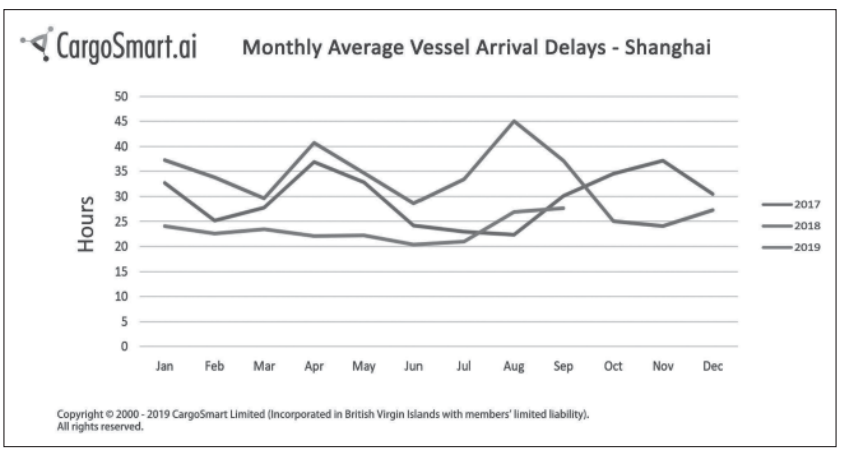
Arrival Delays Have Been Significantly Shortened in 2019

Next, we reviewed vessel arrival delay trends at the three ports over the past three years. We found that at all three ports, the monthly average vessel arrival delays were shorter in the first nine months of 2019 than they were in 2018 and 2017. Comparing the monthly average for each year (January through December for 2017 and 2018, and January through September for 2019), we found that on average, delays were nine hours shorter this year compared to last year in Shanghai, five hours shorter this year compared to last year in Shenzhen, and eight hours shorter this year compared to last year in Ningbo-Zhoushan. Each port has experienced improved performance this year.

Monthly Average Delay Has Hovered Around One Day in Shanghai in 2019

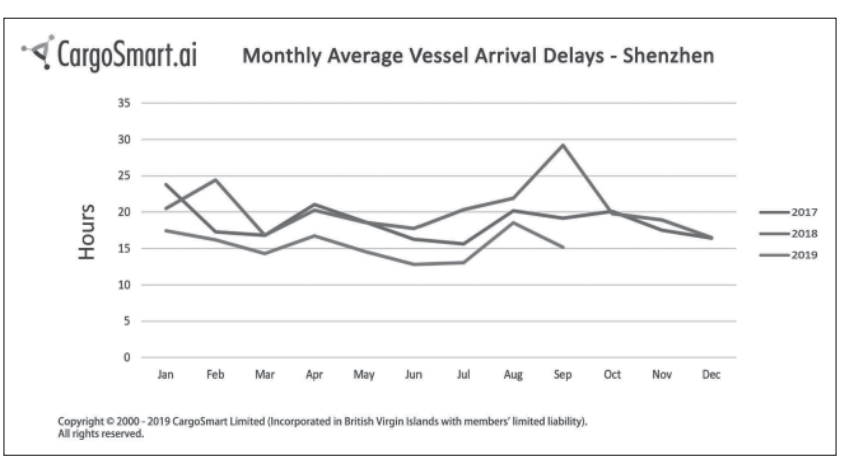
From January through July 2019, the monthly average vessel arrival delay was under 24 hours in Shanghai. In August and September it increased to 27 hours.

One common reason for port congestion and vessel arrival delays in Shanghai is the dense fog that descends upon the port in April and May each year. However, in 2019, we did not see a peak or the prolonged delays at the port in April in May as we saw in 2017 and 2018.



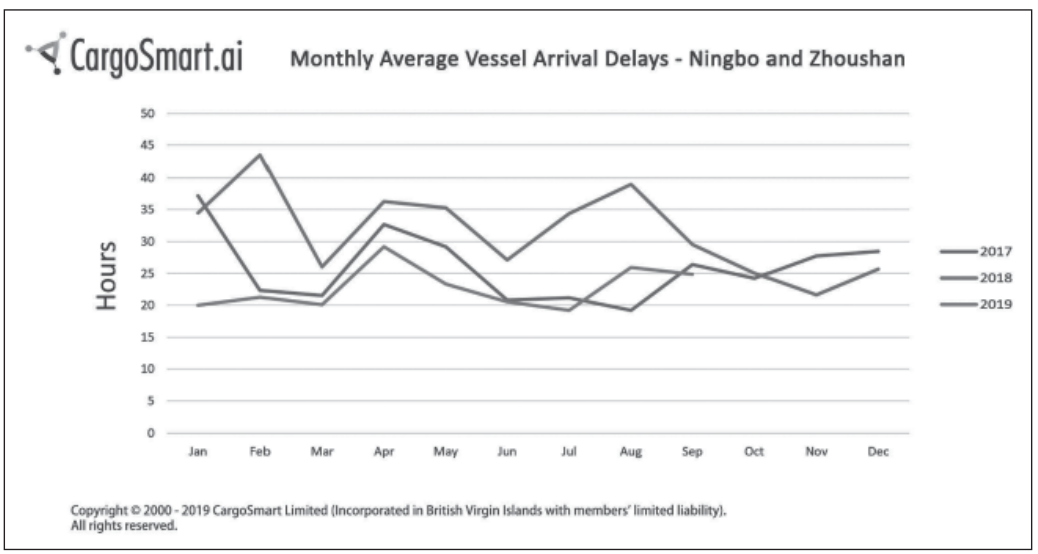
Shenzhen Experienced Delay Peaks in January, April, and August

The pattern of vessel arrival delays at Shenzhen in the first nine months of 2019 have mirrored the delays at the port in 2017. While the monthly average delays are shorter overall in 2019 compared to the two prior years, Shenzhen has experienced peaks in delays in the months of January, April, and August. The monthly average arrival delay has remained under 19 hours in Shenzhen.



Ningbo-Zhoushan Had Increased Delays in April Over Last 3 Years

Ningbo-Zhoushan, located about 200 kilometers (125 miles) south of Shanghai, experienced a jump in vessel arrival delays from March to April over the past three years, possibly due to the fog that occurs in April. Ningbo-Zhoushan experienced its longest delays of the year, through September, in April of 2019. Ningbo-Zhoushan had an overall average monthly delay of 23 hours for the first nine months of 2019, similar to Shanghai. Its monthly average delay ranged from 20 to 29 hours over the period.



Shorter Arrival Delays in 2019 Facilitates Supply Chain Planning

While the reasons for the shorter arrival delays in 2019 are not clear, the shorter delays at all three ports are a positive sign for managing inbound ocean containers to the ports. Among the three ports, Shenzhen has experienced the greatest proportion of on-time vessels while Shanghai and Ningbo-Zhoushan have kept their overall monthly average delays under one day as of September 2019.

(Christine Deihl, Victor Ho, and Mikki Yuen: CargoSmart Limited. CargoSmart empowers companies to digitally transform their global supply chains. Leveraging technologies including artificial intelligence, Internet of Things, blockchain, and a deep understanding of ocean shipping, CargoSmart provides innovative solutions for transportation and logistics teams to collaborate, increase visibility, and gain insights to optimize supply chain planning and operations.)

Speech by USTH at the opening of Hong Kong SAR Pavilion at Marintec China 2019 (with photos)

3 December 2019

Raymond So Wai-man

Distinguished guests, ladies and gentlemen,

Good morning and welcome to the opening ceremony of the Hong Kong SAR Pavilion.

I am honoured to be here with you all at the Marintec China 2019, the bi-annual signature event of the international maritime community in Asia. This year marks the seventh time for Hong Kong to take part in Marintec China since 2007. The Hong Kong Pavilion is set up by the Hong Kong Maritime and Port Board, in collaboration with the Hong Kong Trade Development Council (HKTDC) and the Hong Kong Marine Department. May I take this opportunity to express my deepest gratitude for the support rendered by HKTDC, Marine Department as well as our fellow exhibitors.

Under the National 13th Five-Year Plan, the Central Government has pledged support for Hong Kong to entrench its status as an international maritime centre, which was later reassured in the Outline Development Plan for the Guangdong-Hong Kong-Macao Greater Bay Area published in February this year. As the facilitator and promoter under the Belt and Road Initiative and Greater Bay Area Development, Hong Kong could serve as a springboard for the Mainland companies to go global and for the overseas companies to tap into the vast China market.

When making cross-border trade, reliable and professional support with good reputation would definitely be the key to success. Whether you are from overseas, the Mainland China or Hong Kong, you can always benefit from Hong Kong's vibrant maritime cluster. Hong Kong is home to over 800 maritime services companies. This vibrant maritime cluster offers multifarious services covering ship management, shipbroking and chartering, shipping finance, marine insurance, maritime legal and arbitration services, etc. The Hong Kong SAR Government is by your side to explore the business opportunities.

Indeed, the Government put no stones unturned in further developing the high value-added maritime services in Hong Kong, so as to offer a more facilitating business environment and provide wider variety in maritime services to Mainland and overseas enterprises. For instances, to further develop ship leasing businesses in Hong Kong, a new tax regime is being put forward for qualifying ship lessors and ship leasing managers. Also, the preparation work for the first phase of Hong Kong Shipping Register Regional Desks is now in full swing, with an aim to having our

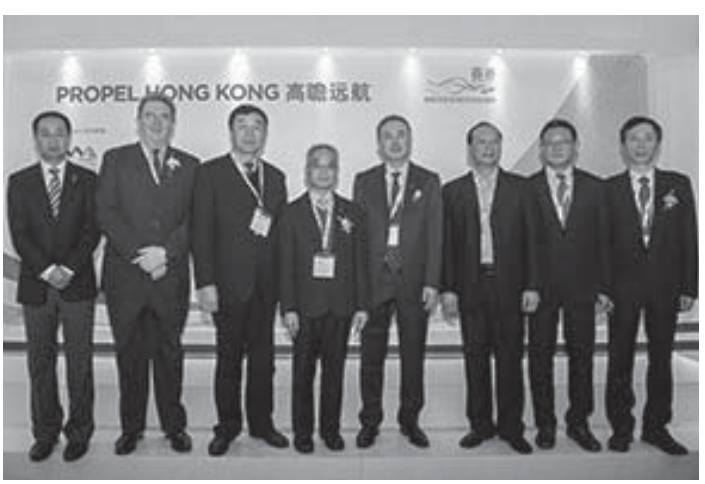
Regional Desks in Shanghai, London and Singapore ready to serve in the first quarter of 2020. The Government will continue to work closely with the industry to understand the industry's need and strive to be the one-stop shop of maritime services for the global shipping community.

Indeed, as you all maybe aware, the International Chamber of Shipping has just launched its China Liaison office in Hong Kong last month, which has reflected the importance of the Chinese market and its recognition to Hong Kong in performing its role as a facilitator and promoter, connecting China and the world.

May I once again thank all the exhibitors, organisers and industry representatives for all the hard work in setting up the Hong Kong SAR Pavilion. I wish Marintec China 2019 a great success, and wish all of you have a very rewarding experience in these four days. Thank you.

(Raymond So Wai-man:
The Under Secretary for Transport and Housing, HKSAR)

The Under Secretary for Transport and Housing, Dr Raymond So Wai-man and the HKMPB delegation attended Marintec China 2019 in Shanghai on 3 December 2019, Dr So (front row, third left) is pictured with the delegates at the Opening Ceremony of the Hong Kong SAR Pavilion.



The Under Secretary for Transport and Housing, Dr Raymond So Wai-man (fourth left) took a group photo with VIPs at Hong Kong SAR Pavilion.

香港航運七十年

劉冀良

香港是我走出校園後打第一份工的地方，始料未及的是這一幹就是十年。由於我在香港的身份是“表叔”[1]的關係，我的師傅自然也以“表叔”居多，也有部分香港本地的老行專。總體來說，香港是我學生意的第一課，香港教會了我許多東西，包括帶上海口音的粵語。1987 年耶誕節前夕人生第一次出境，來到當時還是英國殖民地的香港，這一時期可以說是香港航運蓬勃發展的黃金時期。雖然有一些對 1997 回歸不安的聲音，但經濟繁榮的主旋律壓倒了一切，來自大陸巨大的航運需求給香港航運帶來的空前的繁榮。幾乎什麼生意都可以賺錢，只是多少的區別罷了。

在香港還是一個“小漁村”的時候，上海已被譽為“東方巴黎”，彼時的上海航運遠遠領先於香港；寒來暑往，時過境遷，香港航運在五十年代開始起步，到了八十年代已經遙遙領先上海了；1990 年中央開發、開放浦東的決策給上海注入了巨大的能量，2009 年上海國際航運中心建設又將上海航運推到了一個新高度，有些方面已經超過香港。

為什麼回顧香港航運的文章要提上海？香港和上海這兩座城的關係可以說獨一無二的，緣起緣滅、緣濃緣淡間故事也就發生了。

一、 東方之珠

大陸在 1949-1979 期間與國際航運市場並無直接的通道，於是香港自然而然成為大陸通向國際航運市場的橋樑。招商局集團、香港遠洋、益豐船務等中資船公司利用了香港的特殊地位，為國家的遠洋航運事業做出過巨大的貢獻。

同時，隨著大陸的全面解放，香港作為一個沒有外匯管制、沒有關稅的自由港，自然而然成為了當時大陸船東的不二選擇。後來舉世聞名的香港船東董氏、包氏、趙氏、顧氏、曹氏家族等等，清一色均來自上海（祖籍江浙）。香港的自由港制度為當時的旅港上海船東提供了全新的營商環境和國際舞臺，精明的上海船東從原來中國沿海、東亞近洋航線走向了世界航運市場，最終形成了後來在國際航運市場上舉足輕重的香港華資船東。香港華資、中資船東的崛起令香港本來單一的英資太古、怡和、美資旗昌壟斷一方的局面完全改變，香港成為了名副其實的國際船東集聚地，船東的集聚必然帶來了航運服務業的集聚。據香港船東會的統計，1980 年，香港船東擁有和代管的船舶有 1400 艘 5543 萬載重噸[2]。就這樣，一個位於東北亞南端、東南亞北端的自由港就這樣水到渠成地成為了亞洲區的國際航運中心。

到了改革開放以後，香港更是成為了中資航運機構瞭解世界航運市場的視窗，通向世界航運市場的橋樑。由於當時駐港中資（國有）企業實行行業歸口管理，但凡交通運輸類的企業在組織上都歸招商局集團管理，所以招商局和中遠集團屬下的企業、各省市的駐港航運機構以及“表叔”們的宿舍也多半集中在上環至西營盤一帶。

說起香港的區域劃分，似乎沒有國內城市那麼嚴謹。加力先生的文章《上環故事》曾有這樣一番描述：“恰似這香港地域，有道是港島素有中環、上環、西環之分，但若問起這上環與西環的分界究竟在何處，只怕土生土長的本地人，亦無幾人道得清楚。”

來往深圳、珠海的快速客船停靠位於上環的信德中心港澳碼頭。來自大陸的接船船員一般從蛇口坐船到位於上環的港澳碼頭上岸，再步行至港澳碼頭旁邊的上環電船[3]碼頭，坐電船前往在錨地拋錨或系泊於海港浮筒的遠洋貨輪；休班船員可以按上述原路返回岸上，再搭乘快速船返回蛇口。

說起上環的電船碼頭，大陸船員和航運表叔無人不知，無人不曉。這是大陸海員上岸和回船的聚集地。當時的大陸海員和全世界其他國家的海員完全不同，他們從來不去光顧酒吧或其他風月場所，他們勤儉、顧家，用牙齒縫裡省下的外匯在香港採購家用電器、黃金飾品和其他大陸沒有的新鮮玩意。表叔們本質上就是在陸上工作的“海員”，心態與大陸海員是一樣的，省吃儉用也就為了給家裡添置更多更好的家用電器，給老婆多買一些黃金飾品。所以上環的另一番景象就是通街的電器鋪，金鋪則更靠近中環一點，大陸海員和表叔自然是商鋪的主顧。整條街人聲鼎沸，熙熙攘攘，肩扛手提加小推車運的都是大陸搶手的“四大件[4]”和“四小件[5]”，臨近元旦時還多了一樣東西——香港印製的掛曆，當年也是送禮佳品。

另一方面，香港海事處（統一碼頭道 38 號海港政府大樓）和入境事務處港口管制站（民輝街 32 號中區政府碼頭）儘管地址都標注“中環”，但實際位置都比較靠近上環。因此，船舶代理要經常去這兩處地方辦手續，自然會選擇租金相對中環略低的上環。船舶代理公司的集聚又吸引了下游的供應商。其實，從某種程度上說，這裡簡直是中國現代國際航運中心的一個雛形。你在上環可以找到各種航運服務業，以及通向大陸航運業的各種管道。

圖一：上環地圖（來源：香港海事處）

可惜特區政府雖然早就開始關注保持香港的航運中心地位，但卻對在自己屋企自然形成的航運服務集聚群視而不見，未加引導和培育，更沒有為這種航運服務的集聚效應做整體宣傳，讓世界航運市場更關注香港，讓香港的航運服務商，尤其是本土航運服務商能有更大的舞臺。由此聯想到《法華經》的“貧子衣中珠”的故事：“貧子衣中珠，本自圓明好。不會自尋取，且數他人寶。…”

二、 香港航運的好運期（1949-1979）

作為溝通中外的橋樑，尤其是英國殖民地和自由港這樣一個特殊地位，香港航運得益於 1949 年中國大陸的政權更替，隨後的朝鮮戰爭和越南戰爭，以及 1979 開始的改革開放，令順風順水成為香港航運的習慣。

1. 1949 年大陸政權更替

現代香港航運的起點應該追朔到 1949 年，在國民黨丟失大陸政權前後，原來集中在上海的航運資本隨之南遷到了香港。在上世紀五十年代初，可以說並沒有什麼香港船東的說法，有的是大陸旅港船東，而其中主要的是上海的寧波籍旅港船東，以至於後來的很長一段時間裡據說香港船東會經常可以聽到帶寧波口音的上海話。

早在上海解放前夕，中興、益祥、復興以及中國航運公司等私營船東公司已經將旗下的大部分船舶遷移至香港。以董浩雲為例，在 1949 年後將 [6] 艘較舊的船隻隨中國航運公司總公司在 1950 年正式遷至臺北，遷台後更名為中國航運有限公司（Chinese Maritime Transport Ltd., CMT）；性能更好的天龍輪、通平輪、瑞新輪、天翔輪、北京輪等均開往香港，船旗改為巴拿馬，歸入香港金山輪船公司旗下；而留在上海的只有 1 艘 71.26 噸的拖輪“廣益”號（天津益記輪駁公司所有），2 艘 450 噸長江鐵駁北通號和北達號。

雖然也有部分航商率船北歸，如盧作孚、劉浩清等，但畢竟不佔多數。由於國內當時的經濟體制和政治運動等原因，旅港船東大多選擇繼續留港觀望。

以前香港的航運業一直由外資壟斷，當時控制香港航運業的兩大巨頭分別是美商旗昌輪船公司 (Shanghai Steam Navigation Co.)、英商太古洋行（Butterfield & Swire Co., Ltd.）。1949 年後，來自上海的航運資本，帶著眾多的技術和管理人員以及海員來到香港，尤其是國民黨從大陸敗退後留下的大量海軍軍官和士兵，為這些華資船東提供了大量（相對）廉價的勞動力。一旦遇到航運市場的契機，華資船東的船隊得以迅速擴大，從而改變了外資壟斷香港航運業的局面，也奠定了 50 年代香港航運的基礎和基調。

2. 朝鮮戰爭

由於當時國民黨政權在臺灣實施白色恐怖，不僅在島內到處抓捕共產黨，而且對和新中國有往來的航商採取極其嚴厲的懲罰措施；大陸方面對工商業的社會主義改造也令旅港船東的發展受限；而正當習慣從事中國沿海、大陸與臺灣之間運輸的旅港船東一籌莫展之際，朝鮮戰爭爆發了。“1950 年朝鮮戰爭爆發，恐慌和焦慮情緒令商家開始大量囤積貨物，導致 1951 年海運量大幅度增長，海運業間接受益”[6]。

更重要的是，美國對日本的政策發生了重大的戰略轉變，從限制轉向了全面扶持，而日本作為美軍在朝鮮戰場重要的後方補給基地，除了為美軍提供裝備和物資外，海運需求也大幅度上升了。日本船廠承擔了美軍軍艦的修理和保養，刺激了修造船產業的恢復和發展。日本政府將造船業作為重點扶持對象，為吸引外國船東到日本船廠造船，制定了低息的出口新造船貸款政策。戰後日本工人的工資遠低於歐美，但造船技術並不落後，令日本製造的船舶具有相當大的競爭力。但是，日本本土的船公司卻享受不到這種優惠，而且在船舶經營和管理方面還受到日本法律的種種限制。這種政策產生的一個奇特效果就是，一方面大量外國船東在日本船廠造船，而日本船公司寧願租用外國船舶也不願意在本國造船。旅港中國船東敏銳地發現了這一商機，利用日本銀行的低息貸款在日本造船，再將船舶租給日本公司。旅港大陸船東開始轉變為掛著外國旗（開放登記國）的香港船東。

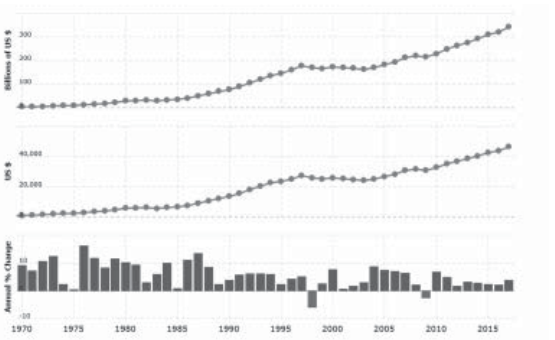
可以說，大陸政權更替和緊接著發生的朝鮮戰爭是香港船東業，尤其是華資船東業起飛的重要推動力。雖然這些香港船東擁有的多數船舶並不需要經常來香港，尤其是大型幹散貨船和油輪，但香港船東擁有的船舶數量、噸位上升給香港的航運經紀、船舶經營、船舶管理、航海教育、海員培訓和海員就業等帶來了極大的刺激性需求，帶動了這些產業在香港的發展。這些產業的特點是“非現場”，與香港的港口以及在港的船舶和貨物無關，我們暫且將這一類與現場無關或關聯度不高的航運服務業稱之為“高端航運服務業”。

3. 抓住了貨櫃樞紐港的先機

1949 年大陸解放前後出現了第一波移民潮，為香港帶來人才和資本。香港人口出現了歷史性的大幅度增長。1945 年，日本投降以後，香港人口下跌至只有 50 萬，而到了 50 年代香港人口急增至 220 萬。六十年代初的三年困難時期，以及後來的文革期間，大量大陸人口遷徙至香港，為後者帶來了充足的勞動力。人力資源為香港提供了經濟起飛的必要條件。

在日本經濟起飛後 20 年後，香港也和其他亞洲新興經濟體一起開始加入世界經濟的產業分工浪潮中，發達國家的勞動密集型產業向政治穩定、人民勤奮的發展中國家和地區轉移，香港再次幸運地趕上了這波浪潮。就在香港的經濟開始起飛時（圖一），她更幸運地趕上了全球貨櫃化的高速發展期。

1966-1967 年貨櫃航運之父麥克萊恩（McLean）費了九牛二虎之力終於說服美國國防部長麥克納馬拉同意用貨櫃解決美軍在越南港口疏運難題，1967 年夏季以後美軍開始啟用海陸公司的貨櫃船承運軍需物資到越南，而日本的貨櫃業務也在同年開始啟動，為東行班輪提供了充足的貨源。



圖二：上線 GDP、下線為人均 GDP（來源：世界銀行）

到了七十年代全球貨櫃化趨勢開始顯現，港英政府開始批地建造貨櫃碼頭。“1972 年，首個貨櫃碼頭「一號碼頭」竣工。1973 年 12 月，葵湧四號地段（四號和六號泊位）以換地形式批出；1974 年 11 月，葵湧五號地段（五號泊位）亦以私人協約方式批出。1976 年，五個貨櫃碼頭全面投入運作。”（摘自香港海事處網站）。

香港的外資和華資船東中只有一家東方海外擠進了世界貨櫃班輪市場。早在 1969 年董氏集團就在法國船廠先後建造了 8 艘全貨櫃輪，並改裝了 2 艘董氏集團在臺灣船公司名下的船舶，從而率先建立起遠洋貨櫃班輪航線，其步伐比日本船東還要早。雖然當年東方海外從香港到美國西岸的長灘只運了 13 標箱，而到訪香港的第一艘貨櫃班輪也非東方海外所有[7]，但作為總部在香港，日後又在香港上市的東方海外對香港貨櫃航運的發展的促進和推動作用是具有歷史意義的。

根據 Intermodal World 的統計，1975 年全球經營貨櫃業務的船公司總共有 88 家，位居第一是美商海陸公司（擁有貨櫃船 58 艘、貨櫃 11 萬箱）、第二名是荷蘭 Scan Dutch（擁有貨櫃船 36 艘、貨櫃 2.7 萬箱）、東方海外以 30 艘船、3 萬箱以上位列世界第三大貨櫃班輪公司[8]。而這時候大陸還在文革末期，全國還在“批鄧”運動中，極少數富有遠見的“臭老九”開始翻譯一些外國文獻，將香港稱之為貨櫃的“Container”概念介紹到中國，並為之起了一個很學術化的名稱“集裝箱”。

圖三：第一艘訪港的貨櫃班輪（來源：AlanLee Goldstein）

香港的貨櫃化比大陸足足早了十年，為後來香港成為大陸最大的中轉（Transshipment）和轉口（Re-export）港奠定了基礎。從此之後香港航運業成為香港三大支柱產業之一，為香港提供了大約 1/4 的就業崗位。

隨著貨櫃班輪掛靠香港的增加，直接惠及圍繞貨櫃和船舶兩方面的航運服務業。這些航運服務業的特點是圍繞著船和貨櫃，服務就在船和貨櫃的現場進行，我們暫且稱之為“現場航運服務業”。再結合前文提到諸如航運經紀、海上保險、航運融資、航運衍生品等與船舶和貨物現場無關的高端航運服務業，這兩種服務業是任何一個航運城市的服務業基本分類。這個話題暫且不展開，下文再詳細討論。

..... 下期續

1. *香港本地人對駐港中資機構外派幹部的戲稱，據說源自樣板戲《紅燈記》裡李鐵梅的唱段“我家的表叔數不清，沒有大事不登門…..”。*

2. *摘自《董浩雲傳》*

3. *在大陸稱為交通艇、交通船，在香港稱為電船。*

4. *當年對內地外派駐港中資機構人員和國際海員在境外購買的大型家用電器（諸如電視機、電冰箱、洗衣機、摩托車、高級相機等），海關給予的進口免稅指標。*

5. *當年對內地外派駐港中資機構人員和國際海員在境外購買的小型家用電器（諸如微波爐、電子錶等、磁帶收錄機、傻瓜相機等），海關給予的進口免稅指標。*

6. *詳見《幹散貨海運市場的近憂和遠慮》*

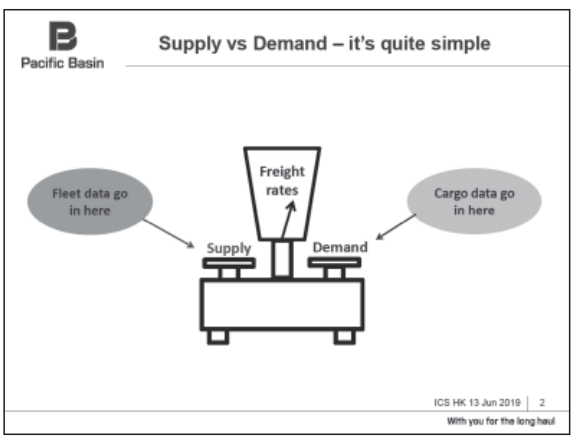
7. *第一艘訪港貨櫃班輪“SS SAN JUAN”*

8. *摘自《董浩雲傳》*

(劉巽良：中國新造船價格指數有限公司董事兼總經理)

ICSHK Column - A different view on the Dry Bulk Market

Morten Hay Ingebrigtsen



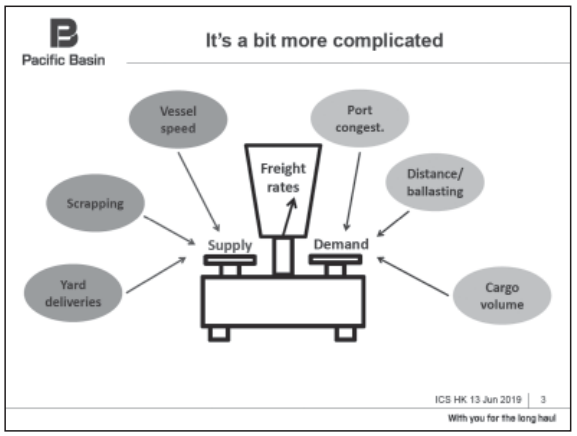
It is useful to start with the basics. Measuring up supply of dry bulk ship capacity against cargo demand and placing the correct weight on each side of the weight scale gets us freight rates as a result.

There is an important comment to add to this approach. We tend to look at supply and demand as two separate entities i.e. they are determined independently and then measured up against each other. I think that is at best misleading.

What I mean is that when we measure demand – in tonnes or tonne-miles – we are merely counting the amount of cargo that was carried, and for tonne-miles the distance from load and discharge ports. As long as the fleet is employed, the demand becomes a function of supply, i.e the carrying capacity. I am not suggesting that there is a better way to measure cargo demand but seeing it merely the sum of the cargo being moved by ships has pitfalls. An important exception to this observation is when there is an excess of shipping capacity that is laid up, but this is seldom the case - at least these days.

Think back to 2007 when ships were in some cases earning over $100,000 per day and the BDI was a 5 digit number. Don't tell me that dry bulk demand for transportation, i.e. what was carried that year, was not constrained by the supply of ships. Of course it was and if there had been more shipping capacity available this would have had no problem finding cargo which would have resulted in the demand measure being much greater than that cargo that was in fact carried.

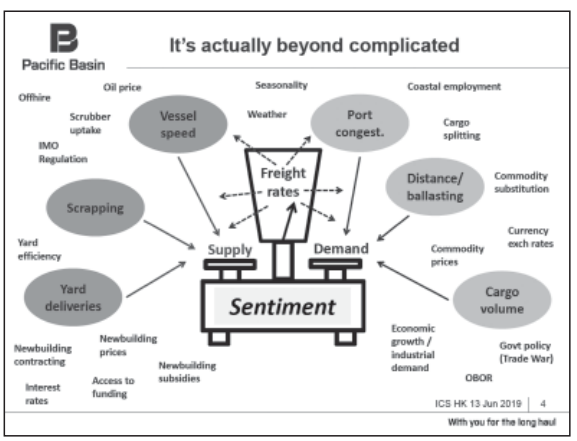
This observation is not meant to dispute the fact that the price of freight is the result of supply and demand for freight but my point is that there is a degree interdependence between the two and weighing them up independently of each other is an over simplification and can be misleading.



Changes in supply and demand can be broken down into sub-parts. On the supply side the most obvious are yard deliveries, scrapping, and lastly speed. In speed I would include not just the movement at sea in knots but also vessels in port, and even laid up ships which have zero speed.

On the demand side we have cargo volume, distance for the laden leg as well as the ballasting that is required to get to the next load port and lastly port congestion. There is no need to spend much time on this except to say that also these elements are not independent of each other because when freight rates change this will affect all of the sub-parts to a greater or lesser extent and with different time lag, something that is often ignored. The most obvious example is scrapping which is largely dependent on market strength/weakness.

These sub-parts are of course all measurable in the past but what is the point of doing that? We already know the freight rates from the past. The reason for weighing up supply and demand is surely to form a view on the future and not the past. But in order to do so we have a lot of other input factors to consider – in fact so many that figuring out the combined effect on freight rates becomes overwhelming even for a computer model which struggles with feed-back loops where the input factors are not static input data but dependent on each other.



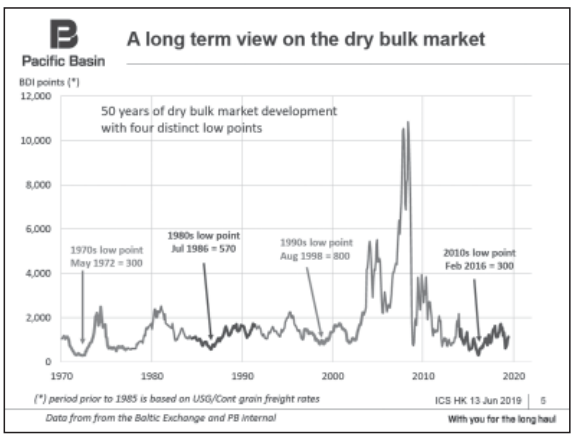
We go a layer deeper by taking a more granular view. A great number of these input factors are also mutually dependent on each other. If, say, the commodity price for iron ore goes up, Chinese steel mills will use more domestically sourced scrap and reduce the demand for iron ore. Less demand for iron ore will reduce the price of iron ore and also freight rates, making imports relatively more attractive. One feedback loop after another.

If this wasn't enough to overwhelm the modelling required to put all of this together into a supply and demand model for freight rates, we have a last bit that is called SENTIMENT. As long as freight rates are negotiated by humans instead of being established by a computer, sentiment, or if you like psychology, will play an important part and this is impossible to model.

So what is the point of all of this? Why bother looking at supply and demand if putting it together into a model is not giving you the right answer? From my point of view, an attempt at modelling does have value but mainly through the thinking that goes into the process and less so the end outcome based on some sort of mathematical analysis.

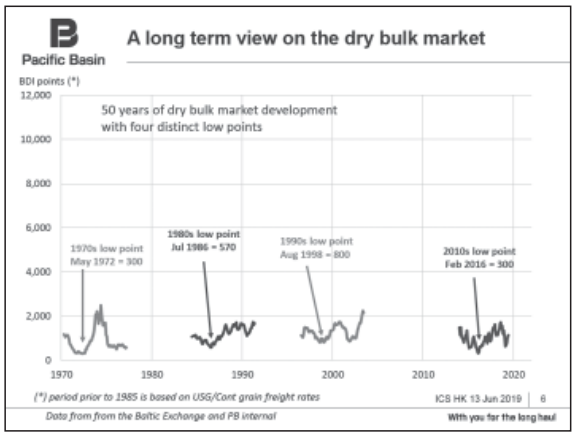
Markets work precisely BECAUSE they can't be predicted. That is the whole point of having a market to determine prices. Vernon Smith, the Economics Nobel Price winner of 2002 admitted in his own word ***"that we do not know why markets work as they do"***. Instead of pretending that we can model supply and demand we should instead follow the advice of the baseball coach com philosopher Yogi Berra who said ***"that you can observe a lot by watching"***. It sound corny but this is where the value lies instead of relying on some computer model doing the thinking on your behalf.

Let's move over to freight rates and take a long term view over almost 5 decades.

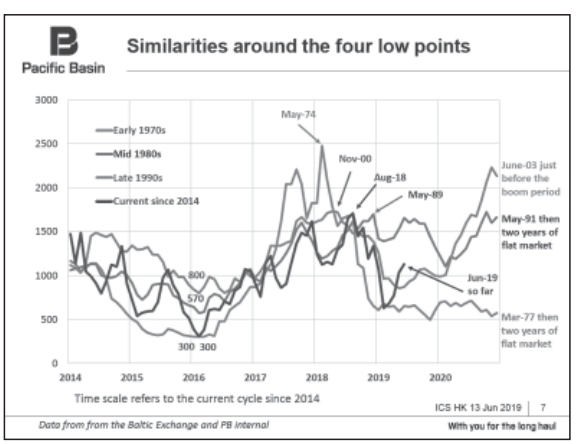


This is the BDI, or Biffex as it used to be called, going all the way back to 1970. The Baltic Freight Index was of course started in 1985 but I have extended it back to 1970 by referring to grain freight rates from US Gulf to Continent which made up a large share of the Baltic Freight Index when it was introduced. Whereas this may not be 100% accurate I suspect it works pretty well in capturing the strength and weakness over this 15 year period before the freight index was introduced.

We are going to concentrate on four key low points and pick a seven year period around each of them. Two years before and five years after each low point. We are purposely ignoring the boom period around 2007/2008 as this was unique and unlikely to be repeated and besides the low point in early 2009 had more to do with the banking crisis than shipping as such.



This is what it looks like when the four 7-year periods are separated. To try and make sense of this we are going to put these four periods together by anchoring each line around its respective low point and use the current blue line from 2014 as the time scale.

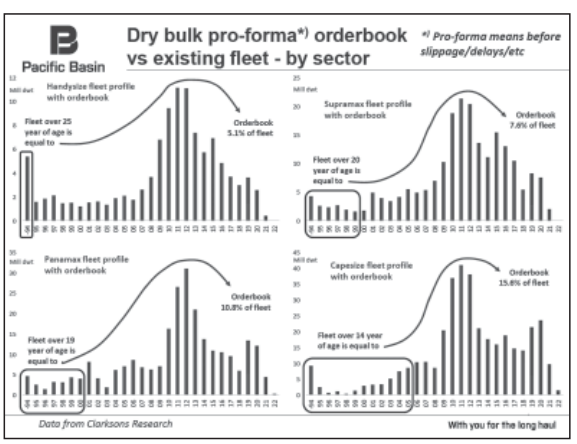


This then what we get.

The current 7-year period therefore starts in January 2014 as a dark blue line and ends with the average for June this year. The development for the four periods as markets declined down to their respective low point was quite similar. We have more of a zig-zag development for the blue line - probably because the market was more dependent on a single economy - China - than in previous periods.

Also the recovery was quite similar although the 1970s did comparatively better. The point at which they peak is also not too far from what we had last year in August 2018 but after that time there has been more spread between the four lines. For a while it looked like 2019 was going to be a repeat of the 1970s – perhaps the Trade War has a similar effect as the Oil Crisis in the mid 1970s(?), but conditions have improved so we are thankfully no longer tracking the 1970s.

Although it is interesting to see how markets behave around key low points there is of course no reason why the future should be a repeat of the past so let's have a look at the supply side and we shall start with the current orderbook and how this relates to the fleet profile.

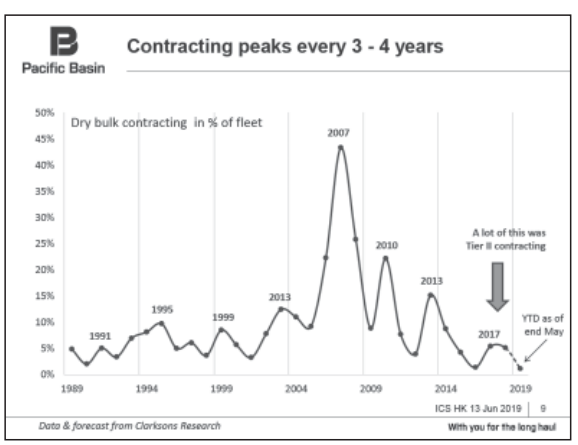


Handysize first. The pro-forma orderbook represents 5.1% of the current fleet – this is the lowest among the four main dry bulk sectors. I stress PRO-FORMA as this is before the usual delays, slippages, cancellations etc. The actual deliveries for the early years balance 2019 and 2020 will likely be less that what the pro-forma orderbook indicates and subsequent years will be higher. The point to highlight is that

the amount of handysize on order - in dwt terms – is equal to the fleet built 1994 or older so the current pro-forma order book is enough to replace the fleet that is 25 years old or more.

Moving on to supra/ultramax the orderbook is 7.6% of the fleet which equates to the fleet that is 20 years old or more. As we move up in vessel size the panamax orderbook at 10.8% of the fleet equates to the current trading fleet of 19 years and older. Finally capesize has the largest orderbook with 15.6% of the trading fleet which equates the fleet built up 2005 or 14 years of age.

This is all about the current pro-forma order book but what about new contracting?



In the year to date, using data from Clarksons, it is pretty much as low as it gets but how will this change going forward? Don't we always have periods of high ordering following a time when this has been low? I think there are a number of reasons why new ordering should remain subdued so perhaps this time the future is really different from the past.

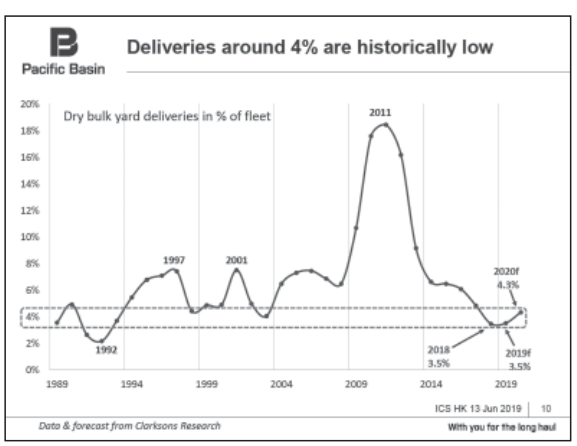
For a newbuilding it gets complicated as an owner needs to think in terms of 20 to 25 years trading life after delivery. This used to be a lot simpler. We have over the last several decades moved up in vessel size, gone from derricks & pontoons to cranes & mechanical hatch covers, but the main engine has always been based around burning heavy fuel oil so there has not been any element of choice for propulsion. The choice of engine type is something that the dry bulk shipping industry has not had to deal with in the past.

So which is right choice of engine when looking 20-25 years ahead? The future may lie with LNG but fuel infrastructure is not available for this to work today – at last not for vessels in tramp service. Or you could opt for a duel fuel engine that can burn both oil and gas but this is more expensive and the economic benefit is very difficult to ascertain. Or you could go for a mono-fuel engine specialised to burn MDO which has its own benefits due to cheaper building cost and more efficient use of diesel but this depends on the fuel choices available for the next 25 years. These days there is talk of ammonia or hydrogen as the fuel of the future but you would have to be very brave to make that choice today.

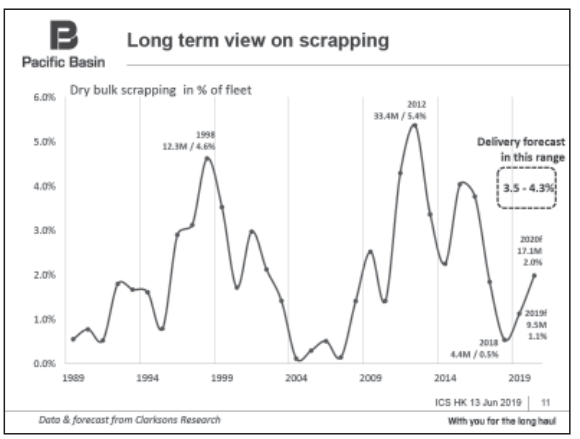
To complicate matters even more, it would be naive to assume that shipping will be immune from new, not yet known, and stricter emission regulation in the future. If so, the new and expensive vessel that is compliant today may become a dinosaur tomorrow.

The point is that the dry bulk shipping industry is not very good at dealing with uncertainty so the typical reaction is to do NOTHING while waiting for more clarity and that is exactly what is happening. The appetite for new contracting is constrained by a new and unprecedented risk surrounding the choice for propulsion technology. Being an early adopter for a new engine technology carries significant commercial risks and this is difficult to combine with shipping's moderate profit margins.

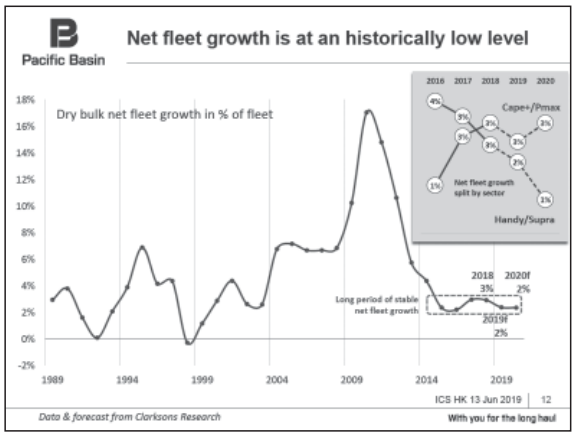
This uncertainty around engine technology is therefore a major change to the past so until there is more clarity, which will likely take time, there is a reason to hopeful that we will not have the excessive new ordering that has in the past been a curse for a sustained recovery in the dry bulk market.



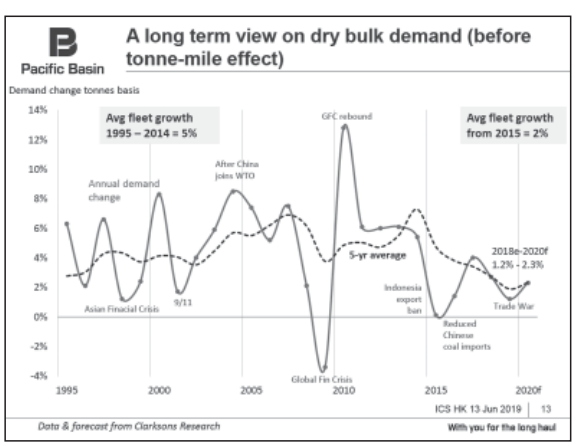
This page looks at past deliveries and what is expected to deliver this year and next – using Clarkson's latest forecast. The take away here is that the recent deliveries in 2018 and what is forecasted for this year and next are within an historically low range. Although we would all like it to be lower – zero percent would be nice – there will always be some yard deliveries so what we can see in front of us looks more benign than what we have had to deal with in the past.



Scrapping is largely a function of the freight market, much more than than vessel age, and this decreases or increases depending on whether the freight market is going up or down. This can therefore be seen as a kind of safety valve for freight rates – working in both directions. If the freight rates reduce, more of the older tonnage will be scrapped and thereby reduce the tonnage surplus whereas in a rising market scrapping will reduce as more ships are needed to cover cargo demand including older ones. As we are currently at an already low level of scrapping – especially for vessels smaller than capesize - it means that the ability to further reduced scrapping and keep the market from running away, is reduced. The scrapping safety valve to keep freight rates from running away is therefore now less effective. For this year and next we have used Clarksons' latest published forecast.



Putting deliveries and scrapping together we get net fleet growth which since 2015 has stayed within a relatively narrow band from +2% to +3% which is historically low. We have in the smaller chart split this in two pats with handysize & supra/ultramax i.e. geared vessels on one side and larger non geared vessels on the other. Here it can be seen that whereas the geared vessels had higher deliveries in 2016 and 2017 they are now lower and are forecasted to decline further when we get into 2020.



Based on Clarksons Research data here is a rough measure of dry bulk demand, in tonnes to keep it simple, i.e. what has been carried by dry bulk vessels, and how this has developed since 1995. In addition to the annual year-on-year change there is also a 5 year average set out. When looking beyond the annual ups and downs we can see the 5 year average having started at just under 3% in 1995 (i.e. capturing the average since 1991), and peaking in 2014 at just over 7%. Since that time it has declined and the 5-year average is flattening out at just over 2% - a level best described as historically low. You have to decide for yourself if this implies future upside or future downside.

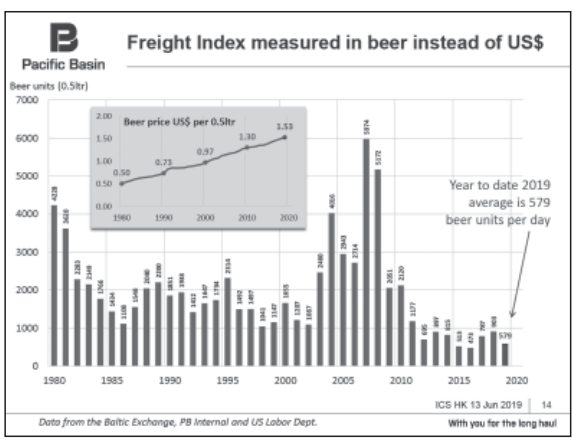
I have also noted in red font some key events of developments as background to the more violent annual changes.

As mentioned to begin with, we are not going to approach this from a supply and demand model perspective where these are regarded as independent elements on a weight scale as this would be an over simplification of the forces that determine freight rates. Instead we should ask ourselves where is the upside or downside from where we are today and how does 'today' stand out in context with the past.

When looking at past freight rates, going back all the way to 1970, we have until now not factored in inflation or indeed US Dollar strength and weakness. We know that operating costs have

increased while cost of finance (=interest rates) are cheaper in the past as long as you can get hold of it from shipping banks. Applying US consumer inflation or exchange rate differences to freight rates can create strange result so is there a better way to capture this? In other words, can we find something that can we used as an inflation- and currency-neutral yardstick for freight rates?

The answer lies in BEER.



Yes 'beer' but not in the sense that drinking beer it brings clarity - although many would argue it does just that – but the price of beer can be used as a measure of USD inflation. Beer is easy to produce, it has not changed – beer is still beer as it was in the past - and there is no reason to expect an over- or under-supply compared to demand so the cost of bear should reflect general inflation. As it happens the US Department of Labor has a price index for beer which is set out in the smaller upper chart. This shows that in nominal terms a half litre of beer cost USD 0.50 in 1980 whereas this has increased to USD 1.53 as an average so far in 2019. So if we apply the price of beer to freight rates we have created an inflation-neutral view for freight rates with the unit of measurement being half-litres of beer.

The BDI has always based on US Dollar freight rates so the price data from the US Department of Labor also works as a currency-neutral measurement.

This is set out on the larger chart with bars. In the year to date the BDI has averaged 579 units of half litres of beer. This is not the lowest, which was 479 in 2016, but it is not far away. What does this tell us?

When looking at this inflation adjusted and currency neutral chart for freight rates, it is difficult to argue that today's level has much downside. Whereas it is impossible for freight rates to decline there is surely more upside than downside based on where we are today.

Thank you.

** Note from Anand Sharma, Chairman, The Institute of Chartered Shipbrokers Hong Kong branch: Above is the text of presentation done by Mr. Morten Hay Ingebrigtsen for ICS Hong Kong Branch on 13th June 2019 at HKMA. The Institute of Chartered Shipbrokers Hong Kong branch was fully delighted to have Mr. Morten*

Ingebrigtsen as a speaker for the event. Many thanks to Morten / Pacific Basin for an interesting presentation.

(Morten Hay Ingebrigtsen: Director, Asset Management of Pacific Basin
Morten has, after starting his shipping career with Wilh. Wilhelmsen in Oslo, worked in Pacific Basin since 1989 in their offices in Hong Kong, Kuala Lumpur and presently in Bad Essen, Germany, where he has been based for the last few years. Morten's areas of expertise is Ship Sale & Purchase and Dry Bulk Market Research & Analysis. Morten enjoys speaking at dry bulk shipping industry events.)

澳門海事博物館：歷史文化體驗、寓教於樂的好去處

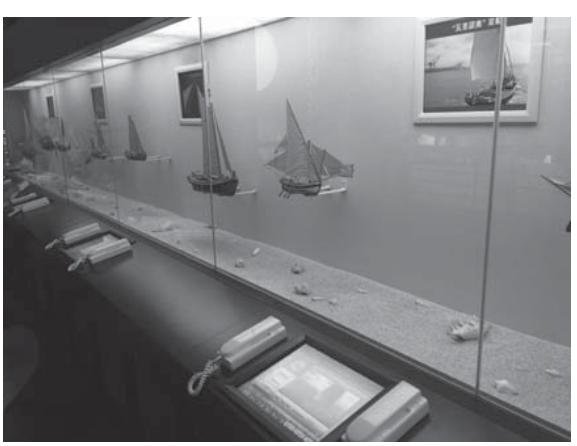
管潔琦 / 劉銳業

在珠江三角洲，澳門占據了特殊的地理位置，並在歷史及文化領域扮演著重要角色。自 16 世紀以來，澳門在航運史上有著重要的歷史地位。借此文，筆者集中介紹澳門海事博物館，其被譽為全澳門 24 所博物館中最具特色的場館之一，希望通過此文讓讀者認識此博物館的演變及獨特之處。

澳門海事博物館建立於 1987 年，館址選擇了位於媽閣廟前地的一個古老而美麗的葡萄牙特色建築物作為展覽大樓。後由於藏品和參觀者不斷增加，1990 年座落於河口旁的新展覽大樓正式落成並啟用至今，位於供奉漁民的女保護神（媽祖）的媽閣廟側面 1。博物館由五個區域組成：海事民俗展覽廳、海事歷史展覽廳、海事技術展覽廳、水族館和圖書館。給人的總體印象是藏品主題豐富、陳列展示生動新穎、管理井然有序，受到各年齡層參觀者歡迎，特別在對青少年的教育中發揮了積極作用。

（照片來源：澳門海事博物館官網）

海事博物館不僅是收藏中心，而且也是文化、教育與學術中心。同時還融合了頗多休閒娛樂的元素。摒棄教育式、正規化、編年體等陳舊、死板的陳展理念，代之以開放式、互動式的生動活潑，讓參觀者感受到是在休閒、在遊覽，而不是在一本正經地受教育。使觀眾感到輕輕鬆鬆，在不知不覺中增長了知識，擴大了視野，繼而受到教育。



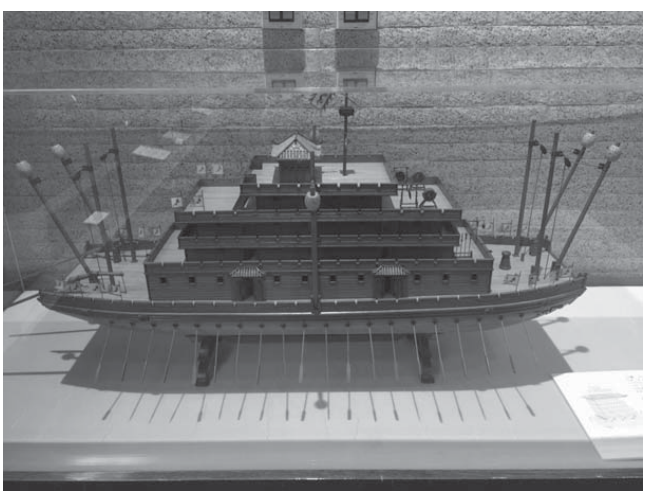
另外，值得一提的是，博物館充滿著濃厚的環境氛圍。走進博物館，側面一整面牆的航海浮雕，以及牆上隨處可見各式航海主題相關的油畫、藝術品、圖片等，就連洗手間的裝飾風格也讓人感覺身處正在航行的船艙。特別是以航海為主題的油畫，在濃郁的歷史氛圍中，散發出獨特的藝術氣息。

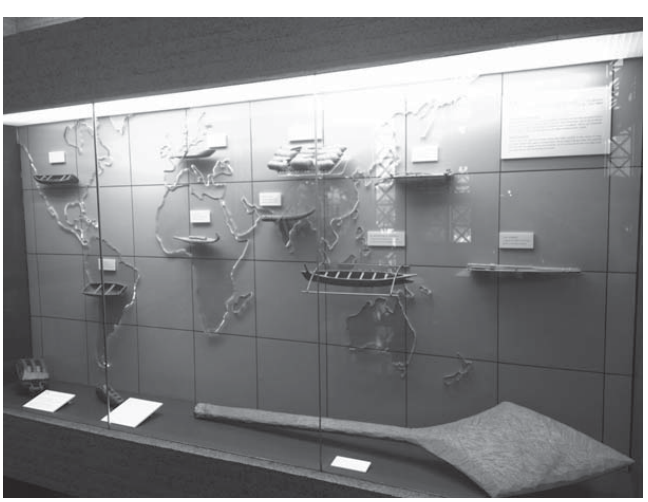
最吸引低年齡層觀眾的是博物館中的互動設施。各個主題的展區都以生動的形式作介紹，比如透過四幅活動佈景演繹出馬祖傳說，讓低年齡層的觀眾在興致勃勃中了解到媽祖文化。還有一個代表北半球的天空模型，以表現觀星航行對航海的重要性。透過人手操作系統，參觀者可找到不同的星宿，包括自己的星座。相信博物館的陳展理念是希望文化、歷史教育要從孩童抓起，寓教於樂，潛移默化地讓低年齡層觀眾主動吸收知識。

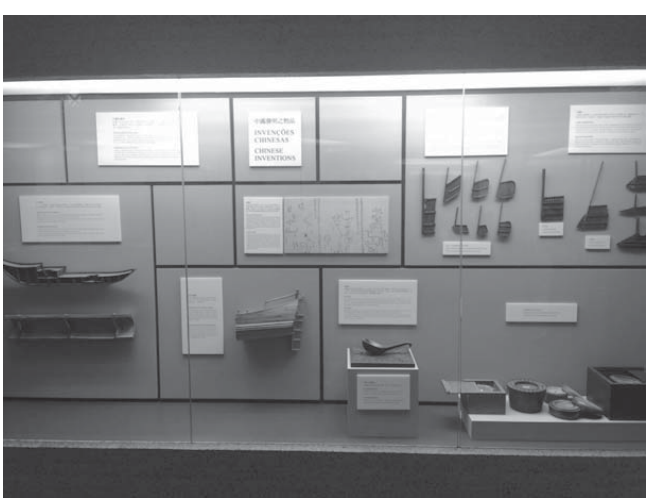
澳門海事博物館還有兩處別有洞天的展區 --- 水族館和圖書館。水族館內設有不同主題背景的水族箱，代表不同的水底環境，反映海港的水域，以及模擬藏有沉船遺骸的深海水底。圖書館有約 2500 本藏書，向公眾開放但須提前申請預約，因為其中存有眾多具高收藏價值的歷史文獻和專題書籍等。

總體而言，博物館的陳展以時期或歷史事件為主線，有脈絡地貫穿文化、教育、休閒、娛樂元素於其中，著實成為一個文化旅遊、親子教育、休閒體驗的好去處。

目前，博物館的使用率不足需得到重視，筆者建議博物館需加大宣傳力度，可以增添一些體驗館或虛擬實境遊戲。再者，可以定期舉辦一些小型的主題講座和論壇等，從而吸引不同公眾人士參與。最後，博物館可以考慮與相關教育機構、政府部門及運輸學會舉辦一些活動及比賽，以增加知名度及吸引更多回流參觀者。







(管潔琦：澳門旅遊學院

劉銳業：工商及款待業管理學部 , 專業及持續教育學院，香港理工大學)

航行安全，小心駛得萬年船

林傑

2008 年 3 月 22 日晚上九時多，香港水域發生一宗撞船事故，導致 18 名烏克蘭船員死亡慘劇。此宗案件在 2009 年提上區域法院審訊，經過差不多 90 天的審訊，於 2010 年 1 月 15 日法官把四個被告判監，包括雙方船長和兩名本港引水員。香港引水員因撞船而被判監，是香港開埠 178 年來的第一次；以往的案件多是被罰停牌或吊銷牌照的。

2012 年 10 月 1 日晚上，香港發生了一宗撞船事故，涉及一艘本地渡輪和一艘本地載客小輪相撞。此宗意外導致 87 人受傷，39 人死亡。事發時天氣良好，能見度良好，現場不是繁忙水道，海面寬濶，為什麼仍會發生撞船慘劇？

船上的助航儀器，如全球衛星定位系統 (GPS) 和電子海圖 (ECDIS) ，都不可以作為海上避碰。2001 年 11 月國際海事組織通過的船舶自動辨識系統 (AIS) ，也不可以用作避碰。那末，有什麼東西可以用作避碰？

答案是有的，可以用作避碰的東西是人。**他 / 她的思想、態度和行為**，只有依據《1972 年國際海上避碰規則》來採取避碰行動才能有效避碰。

上述的助航儀器只能協助值班駕駛員的航行定位而不能避碰，就算現今最先進的雷達也是助航儀器；究竟**何時採取避碰行動，是由人決定**，並不是由儀器決定的。

但是，人畢竟是有很多缺點的，其中一種是「倚賴」。倚賴某種儀器，直至發生慘劇才醒覺，已經太遲了。

《1972 年國際海上避碰規則》乙部第一節至第三節更是應當要遵守的，那就不會導致撞船的了。

筆者曾在海運季刊 2006 年夏季第 74 期談論過避碰規例，現也不厭其繁，將一些精髓在此談談：

航行時注意事項

- 不可使用 VHF 無線電話來避碰。
- 不可使用 AIS 自動辨識系統來避碰。
- 駕駛態度，包括預留空間。
- 近距離航經任何設施時，要注意航速。
- 船吸、岸吸和岸推。
- 必須遵守國際避碰規例：
  a. 能見度受限制 (日間都要亮航行燈)
  b. 瞭望
  c. 安全速度
  d. 碰撞危機 – 對遇、交叉相遇
  e. 避碰行動、聲音和警告訊號、霧號
  f. 狹窄水道
  g. 分道航行

現簡單說說國際避碰規則內的條文和要求：

甲部 – 總則

第三條的名詞解釋定義 – 能見度受限制

在任何天氣情況下，能見度受到霧、霞、下雪、大暴雨、沙風或其他類似原因而減低。

乙部 – 駕駛及航行規則

第一節 船舶在任何能見度的行為

第五條 - 瞭望

瞭望以**目視**及**聆聽**方式，同時適合在當前環境下使用所有可以利用的方法來瞭望，因而有一全面形勢和碰撞危機的評估。

瞭望範圍應是水平 360° 圓週，瞭望人員不可以擔當瞭望以外的工作。

下述摘自國際海事組織決議案 A285(VIII) 號「航行值班基本原則和操作指引的建議」：

「瞭望

每艘船舶必須於任何時間以視覺及聽覺保持適當瞭望，連同適合當前環境和海況可使用的所有方法，因而有一全面形勢評估和碰撞危機，擱淺及其他對航行有危害物。此外，瞭望須包括偵察遇險船舶或飛機、沉船遇險人士、殘骸和垃圾廢物。當應用這些原則，須遵從下列事項：

(1) 無論誰人擔當瞭望一定要專注瞭望工作，和不能指派其他工作或要他擔當其他工作，致令干擾他保持適當瞭望；

(2) 瞭望人員和舵工的職責要分開，舵工司舵時不應當作瞭望人員，除非是在小型船舶駕駛位置上提供沒有阻礙全觀景的窗，和沒有干擾夜視目光或其他干擾保持適當瞭望；」

人為錯誤 / 疏忽

- 對當前環境 / 海面交通情況不瞭解；
- 在操控上對時間判斷不足；
- 船速、泊角的運用；
- 緊急應變守則 / 常規測試；
- 緊急應變操練；
- 駕駛態度，預留空間的習慣；

第六條 - 安全速度

什麼是安全速度？答案是：

「每艘船舶在任何時間應以安全速度航行，因而她能採取適當和有效行動去避碰，並能在當前環境和條件下於一適當距離範圍內停船。」

“適當距離” 根據你自己船舶的特性，船長要知道這些船舶的特性，如轉左或轉

右所需的車速和在海上要多大迴轉直徑。一般停止機器至船舶在海上完全停止前進時所需的衝距和時間，緊急煞停船舶 (隨即開倒車) 時所需衝距和時間等。

“停船” 是船舶停止前進，而不是停止機器。船是浮在水上的，機器停止而船是繼續向前衝的，直至她的前衝能量完全消失時，才能停定下來。

第七條 - 碰撞危機

最簡單判斷：來船羅經方位沒有明顯改變，則碰撞危機必然存在。

第八條 - 避碰行動

- 在當前環境許可下，應按乙部的規則，採取避碰行動應要明確的、及早的，並且須運用良好的航海和船藝技術。

- 任何改變航向或航速來避碰，必須使到對方船隻在視覺上或用雷達均可以清晰知道。

- 如果海面足夠的話，祇改變航向是最有效地避開兩船迫逼於一處，但行動要及早、果斷，同時不會和另一艘船發生迫逼局面。

避碰行動應要在一安全距離經過，要小心觀察所採取的行動是否有效，直至對方船最後遠離為止。

何謂安全距離？

依據筆者的經驗和知識，除了前段所述的**“適當距離”**外，兩船在互相駛過時不會發生船吸現象 (Interaction between ships) 的距離，是謂安全距離。

船吸的發生原因

船舶是一排水量物體，她在水中航行時，螺旋槳或推進器會抽去船舷兩旁及船艉附近的水，使船舶推動向前。船艏推開前端的水而產生正壓力，兩舷的水快速流過船體，並被螺旋槳抽往艉部而產生負壓力，船艉因螺旋槳抽出的水而產生正壓力；這正壓力較之船艏的正壓力為少。其遺留下來的船位空間需要四週的水來填補。

船舶航行時所產生的水壓力場的大小，是基於她的排水量（即吃水深度）、船體外形設計（關乎船型系數）和船速為因數。這些因數愈大，水壓力場愈大。船舶的推動力使船舶四週的水形成上述的壓力場，任何物體進入這壓力場，船吸現象便會發生。船速是其中一個最重要的因數，這個船速是可以由人即場控制的。

第九條 - 狹窄水道

在狹窄水道或航道上必須靠自己的右舷航行。

- 長度 20 米以下的船舶或任何長度的帆船不得妨礙 (要禮讓) 祇能在該狹窄航道或航道安全航行的船舶。

- 從事捕魚的船舶不得妨礙 (要禮讓) 在狹窄航道或航道航行的任何船舶。

- 如果橫過狹窄航道或航道，而會妨礙他船安全通航該狹窄航道或航道，就不應該橫過。使用狹窄航道或航道通航的船舶，可以根據第三十四條 (d) 段發出五短急促汽笛聲，向橫過船表示懷疑其動向。

- 在狹窄航道或航道上，只有被追越船採取行動配合讓路，追越船才可以追越 (超前)；意欲追越的船舶應依據第三十四條 (c)(i) 段發出汽笛聲：
  －－·　　我想在你右舷追越；或
  －－··　　我想在你左舷追越。

- 當船舶於狹窄航道或航道接近一彎位時，在對面因受障礙物所阻而看不見對面來船，應提高警惕、小心航行和依據第三十四條 (e) 段發出一長汽笛聲。

- 任何船舶如環境許可下，不得在狹窄航道上錨碇。

第十條 - 分道航行

小於 20 米的機動船和任何長度的帆船，不應妨礙 (要禮讓) 只能在分線航行計劃內的船舶安全航行。

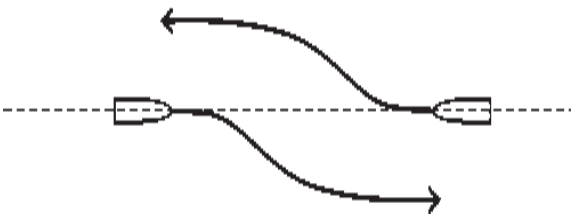
小船應在近岸交通區域航行。

橫越分線航道時，應以分線航道與船首成 90 度，及不得妨礙 (要禮讓) 正在分線航道內的船舶安全航行。

第二節 互見船隻的行為

第十四條 - 對遇局面

- 當兩艘機動船在相對的或接近相對的航向上相遇而涉及碰撞危險時，**各船須向其右舷轉變航向**，以致各從他船的左舷駛過。

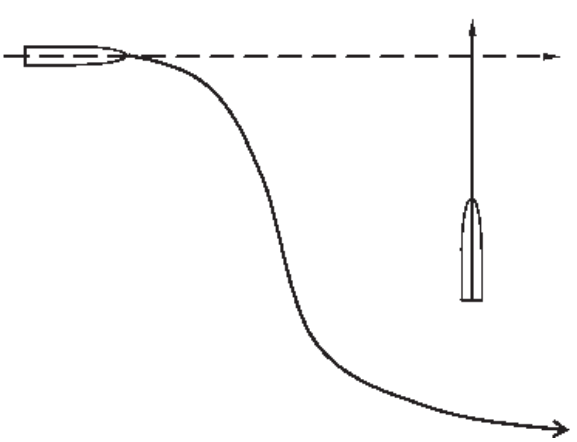


- 此種局面在下述情況下即當作存在：當一艘船隻看見他船在正前方或接近正前方，而如當時是夜間，它能看到他船的前後桅燈處在一條直線上或接近於處在一條直線上，及 或能看到兩盞舷燈，又或如當時是日間它能看到他船的相應形態。

- 當船隻懷疑是否存在此種局面時，它須假定存在此種局面並須據此採取行動。

第十五條 - 交叉相遇局面

- 當兩艘機動船交叉相遇而涉及碰撞危險時，有他船在其右舷的船隻須給他船讓路；如果環境允許，則須**避免從他船前方橫越**。



第三節 船舶在能見度受限制時的行為

第十九條 - 船舶在能見度受限制時的行為

(a) 第十九條應用於船舶在能見度受限制的區域或附近，而不能互見的時候。

(b) 每艘船應根據當前環境和能見度受限制的情況下，以安全速度航行。機動船應將其主機置於候命狀態，隨時可以調速和操控。

(c) 當遵守乙部第一節的條文時，每艘船必須考慮當前環境和能見度受限制的情況。

(d) 當船舶祇是用雷達探測到另一艘船存在，逼迫局面正在發展中或碰撞危機存在時，她應及早採取避讓行動。假如需要轉航向避讓，盡可能：-

i) 不要為正橫前船隻轉航向左，除非是被追越船；

ii) 不要轉航向朝著正橫或正橫後之船舶。

(e) 除非証實沒有碰撞危機存在，每艘船在其正橫前聽到他船的霧號，或不能避免與其正橫前的船舶形成逼迫局面，應將航速減至最少至僅可維持航向；必要時，停車和倒車，小心航行直至碰撞危機消除為止。

丁部 – 聲號和燈號

第三十四條 - 操縱行動和警告訊號

當雙方互相看見之時，**機動船舶**應以汽笛發出其操縱行動訊號。

短聲：一右　二左　三倒後

(d) 當雙方互相看見之時，由於任何理由，如有懷疑或不明白對方的意向或行動，有懷疑的一方應以汽笛發出聲音訊號。
最少五短而急促的短聲

第三十五條 - 能見度受限制下的聲音訊號

無論日與夜，船舶在能見度受限制下航行，必須發出本條規定的聲音訊號。

例如：

機動船在航中並在水中行進時，必須每不超過兩分鐘響一長汽笛聲；

機動船在航中，停船及沒有在水中行進時，必須每不超過兩分鐘響兩長汽笛聲。

筆者深信每位船舶駕駛員和船長嚴格遵守《1972 年國際海上避碰規則》，才能真正做到小心駛得萬年船。

(林傑：退休船長
Master Mariner, FIS, MH.)

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The number of words in an article should be around 1000, with soft copy in .doc format. Please mail to:
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Article(s) submitted for Seaview should be:
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