

ATTACHMENTS

ATTACHMENT CHAPTER 2

2.1 The First Industry Interview Survey Form

2.1.1. Shipping Company Interview Form

(1) Form A

Company Code No. _____ (refer to company list)

S/N

SHIPPING COMPANY INTERVIEW - Form A

1 Year of establishment _____

2 Ownership type

- ☐ Private (Indonesian)
☐ State-owned

- ☐ Joint Venture, please indicate nationality of mother companies
☐ All Indonesian
☐ Indonesian and Foreign, pls specify _____

3 Service offered (check if available) and revenue and cost contribution to company

	Share in total company revenue							
	0-10%	10-20%	20-30%	30-40%	40-50%	50-60%	60-70%	70-80%
<input type="checkbox"/> Freight shipping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Passenger shipping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Agency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Bunkering	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Warehousing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Trucking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Others, pls specify	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4 Category/ies of shipping line

- ☐ International ☐ Angkutan Laut Perintis ☐ Pelayaran rakyat
☐ Inter-island ☐ Angkutan Laut khusus

5 Organization and Manpower

Draw the company organization chart identifying headquarters and local offices

6 Indicate the manpower of your company

	No. of personnel	working days/week	working hours per day
Seafarer			
Head Office			
Others (Branch Office, etc)			

7 Top 5 major clients for freight shipping services (for the last two years 2001 and 2002)

	Client Name	Office location	Main cargo	Ports of shipment		Cargo volume (MT)	
				From	To	2001	2002
1							
2							
3							
4							
5							

	1998	1999	2000	2001	2002
8 Cargo volume handled in MT					
Container volume in TEU					

9 Kindly provide us with your freight rates in relation to origin and destination, for the top 5 commodities handled in 2002.

i. _____ fee: _____ ☐ /MT ☐ /TEU ☐ /CuM
ii. _____ fee: _____ ☐ /MT ☐ /TEU ☐ /CuM
iii. _____ fee: _____ ☐ /MT ☐ /TEU ☐ /CuM
iv. _____ fee: _____ ☐ /MT ☐ /TEU ☐ /CuM
v. _____ fee: _____ ☐ /MT ☐ /TEU ☐ /CuM

10 Major cost item of operation for year 2002, please indicate approximate amount to reach the total company expenses.

Consumption of fuel and lubrication oil

Fuel amount _____

Purchased from : (☐ Foreign ☐ Domestic)

Lubrication Oil amount _____

Purchased from : (☐ Foreign ☐ Domestic)

Maintenance and repair

Annual average cost

Location of dock (☐ Foreign ☐ Domestic ☐ Both)

Insurance

Type of insurance

Annual insurance payments _____ Rp - or - _____ % of annual income

Company (☐ Foreign ☐ Domestic ☐ Both)

Loan repayments

Interest payment

Principal Repayment

(☐ Foreign bank ☐ Domestic bank ☐ Both)

11 Do you intend to expand your fleet in the near future

☐ Yes how many _____ → go to Question 12

☐ No → go to Question 13

12 Please describe the ship or ships you would like to add to your fleet

	SHIP 1	SHIP 2
Procurement method	<input type="checkbox"/> New ship order ○ foreign shipyard ○ local shipyard <input type="checkbox"/> Second-hand ship order <input type="checkbox"/> Charter <input type="checkbox"/> Lease-purchase	<input type="checkbox"/> New ship order ○ foreign shipyard ○ local shipyard <input type="checkbox"/> Second-hand ship order <input type="checkbox"/> Charter <input type="checkbox"/> Lease-purchase
Type of Ship	<input type="checkbox"/> Tanker <input type="checkbox"/> Passenger <input type="checkbox"/> Bulker <input type="checkbox"/> Conventional <input type="checkbox"/> Container <input type="checkbox"/> Others	<input type="checkbox"/> Tanker <input type="checkbox"/> Passenger <input type="checkbox"/> Bulker <input type="checkbox"/> Conventional <input type="checkbox"/> Container <input type="checkbox"/> Others
Size (GT)	<input type="checkbox"/> = 175 <input type="checkbox"/> 2,001 ~ 5,000 <input type="checkbox"/> 176 ~ 500 <input type="checkbox"/> 5,001 ~ 10,000 <input type="checkbox"/> 501 ~ 1,000 <input type="checkbox"/> 10,001 ~ 15,000 <input type="checkbox"/> 1,001 ~ 2,000 <input type="checkbox"/> > 15,000	<input type="checkbox"/> = 175 <input type="checkbox"/> 2,001 ~ 5,000 <input type="checkbox"/> 176 ~ 500 <input type="checkbox"/> 5,001 ~ 10,000 <input type="checkbox"/> 501 ~ 1,000 <input type="checkbox"/> 10,001 ~ 15,000 <input type="checkbox"/> 1,001 ~ 2,000 <input type="checkbox"/> > 15,000
Estimated cost, if known (incl. Purchase, refurbishing, transportation) in Rp		
Financial scheme	<div style="text-align: right;">Share (%)</div> Long-term loan (>1 yrs) _____ Short-term loan (=1yrs) _____ Equity _____ Others _____	<div style="text-align: right;">Share (%)</div> Long-term loan (>1 yrs) _____ Short-term loan (=1yrs) _____ Equity _____ Others _____

13 Under what financial terms do you feel it would be (marginally) inducive to invest in a ship (new or second-hand) to expand your fleet

- i. interest rate should be at least _____% p.a.
- ii. the repayment period should be at least _____ years
- iii. the available amount should cover _____% of the total purchase cost of the ship
- iv. any other additional conditions ? : _____

14 What is your opinion of the lease-purchase agreement to finance a ship (new or 2nd-hand) procurement?

Lease-purchase agreement means that the Vessel becomes (or purchased as) Lessee's property after the termination of the lease period

- i.
 - ☐ It is more attractive than conventional schemes (i.e. bank loan)
 - ☐ It is equally attractive as conventional financial schemes
 - ☐ It is less attractive than traditional than conventional financial schemes

ii. Kindly elaborate on the major reason or reasons for your answer

iii. Under what conditions would make the lease-purchase agreement inducive for a ship investment

15 Kindly describe other practical scheme that will induce ship-owners to invest in (new or 2nd hand) ships, if any.

16 What is your opinion on available finance for a ship procurement (new or 2nd hand)?

- 17 Please indicate your company's policy by ranking the following key aspects of management based on your company's priority (1 is the highest priority)

priority	specific description
_____ Revenue maximization	_____
_____ Cost cutting in operation	_____
_____ Personnel development	_____
_____ Organizational strength	_____
_____ Safety in operation	_____
_____ Marketing of the company	_____
_____ Environmental consideration	_____
_____ Fleet expansion	_____
_____ Implementation of new technology	_____
_____ Financial resources (e.g. credibility and	_____
_____ linkages with banks)	_____
_____ (others)	_____

- 18 What do you recognize as impediments for the improvement and modernization of management of your company (indicate ranking, 1 is the most significant impediment)

priority	specific description
_____ Old age of ships	_____
_____ Lack of skills of seafarers	_____
_____ Lack of man-power	_____
_____ Shortage of vessel	_____
_____ Lack of fund	_____
_____ Poor port operation/facilities	_____
_____ Regulation and its implementation	_____
_____ High rate of invisible cost	_____
_____ Lack of information technology	_____
_____ (others)	_____

- 19 What should the government do to improve and expand Indonesian domestic shipping industry

i. ... With regards to Indonesian fleet expansion

ii. ... With regards to port services/facilities (specify port name)

iii. ... With regards to ship repair and maintenance (specify dock name)

iv. ... With regards to maritime safety and navigation

v. ... With regards to maritime shipping governance and regulation

(2) Form B

Company Code No. _____ (refer to company list)

S/N

SHIPPING COMPANY INTERVIEW - Form B

How many ships does your company use for freight shipping or passenger transport service (including chartered ships)? _____

Kindly describe your freight shipping fleet by filling in the following table

	Ship No.	Ship No.
1	Name of Ship	
2	Owned, leased, or chartered <input type="checkbox"/> Owned <input type="checkbox"/> Lease (Hire)-purchased <input type="checkbox"/> Chartered <input type="radio"/> Bareboat charter <input type="radio"/> Time charter <input type="radio"/> Voyage charter <input type="checkbox"/> Others	<input type="checkbox"/> Owned <input type="checkbox"/> Lease (Hire)-purchased <input type="checkbox"/> Chartered <input type="radio"/> Bareboat charter <input type="radio"/> Time charter <input type="radio"/> Voyage charter <input type="checkbox"/> Others
3	Type of Ship <input type="checkbox"/> Container <input type="checkbox"/> Conventional <input type="checkbox"/> Bulker <input type="checkbox"/> Tanker <input type="checkbox"/> Passenger <input type="checkbox"/> Others	<input type="checkbox"/> Container <input type="checkbox"/> Conventional <input type="checkbox"/> Bulker <input type="checkbox"/> Tanker <input type="checkbox"/> Passenger <input type="checkbox"/> Others
4	Type of shipping service <input type="checkbox"/> International <input type="checkbox"/> Pioneer <input type="checkbox"/> Inter-island <input type="checkbox"/> Special <input type="checkbox"/> Traditional	<input type="checkbox"/> International <input type="checkbox"/> Pioneer <input type="checkbox"/> Inter-island <input type="checkbox"/> Special <input type="checkbox"/> Traditional
5	Registered port (Flag)	
6	Class (BKI, NK, GL, ...)	
7	Size Length (m) _____ Breadth (m) _____ Depth (m) _____ Max. Draft (m) _____ GT _____ DWT _____ HP _____	Length (m) _____ Breadth (m) _____ Depth (m) _____ Max. Draft (m) _____ GT _____ DWT _____ HP _____
8	Carrying capacity <input type="checkbox"/> Persons <input type="checkbox"/> TEUs <input type="checkbox"/> MT	<input type="checkbox"/> Persons <input type="checkbox"/> TEUs <input type="checkbox"/> MT
9	Main engine power HP	HP
10	Normal speed Knots	Knots
11	Does the ship have its own loading/unloading equipment <input type="checkbox"/> No <input type="checkbox"/> Yes, brief description	<input type="checkbox"/> No <input type="checkbox"/> Yes, brief description
12	Year built	
13	Ship Insured Value year: _____ <input type="checkbox"/> Rp _____ <input type="checkbox"/> US\$	year: _____ <input type="checkbox"/> Rp _____ <input type="checkbox"/> US\$
14	Lease charge and year started (if chartered or hire-purchased) charge: _____ <input type="checkbox"/> Rp year: _____ <input type="checkbox"/> US\$ <input type="checkbox"/> per year <input type="checkbox"/> per voyage <input type="checkbox"/> others (specify)	charge: _____ <input type="checkbox"/> Rp year: _____ <input type="checkbox"/> US\$ <input type="checkbox"/> per year <input type="checkbox"/> per voyage <input type="checkbox"/> others (specify)

15	Was this ship purchased or leased from an Indonesian or Foreign company	<input type="checkbox"/> Indonesian <input type="checkbox"/> Non-Indonesian (foreign)	<input type="checkbox"/> Indonesian <input type="checkbox"/> Non-Indonesian (foreign)
16	Number of Crew	Indonesian: Non-Indonesian: Total:	Indonesian: Non-Indonesian: Total:
17	Major Service route, Ports-of-Call and service patterns.	Representative route: <input type="checkbox"/> tramper <input type="checkbox"/> liner	Representative route: <input type="checkbox"/> tramper <input type="checkbox"/> liner
18	Top 3 Major cargo movement	Commodity _____ Volume _____ <input type="checkbox"/> MT <input type="checkbox"/> TEU <input type="checkbox"/> CuM <input type="checkbox"/> pax Loading port _____ Unloading port _____	Commodity _____ Volume _____ <input type="checkbox"/> MT <input type="checkbox"/> TEU <input type="checkbox"/> CuM <input type="checkbox"/> pax Loading port _____ Unloading port _____
Commodity _____ Volume _____ <input type="checkbox"/> MT <input type="checkbox"/> TEU <input type="checkbox"/> CuM <input type="checkbox"/> pax Loading port _____ Unloading port _____		Commodity _____ Volume _____ <input type="checkbox"/> MT <input type="checkbox"/> TEU <input type="checkbox"/> CuM <input type="checkbox"/> pax Loading port _____ Unloading port _____	
Commodity _____ Volume _____ <input type="checkbox"/> MT <input type="checkbox"/> TEU <input type="checkbox"/> CuM <input type="checkbox"/> pax Loading port _____ Unloading port _____		Commodity _____ Volume _____ <input type="checkbox"/> MT <input type="checkbox"/> TEU <input type="checkbox"/> CuM <input type="checkbox"/> pax Loading port _____ Unloading port _____	
Commodity _____ Volume _____ <input type="checkbox"/> MT <input type="checkbox"/> TEU <input type="checkbox"/> CuM <input type="checkbox"/> pax Loading port _____ Unloading port _____		Commodity _____ Volume _____ <input type="checkbox"/> MT <input type="checkbox"/> TEU <input type="checkbox"/> CuM <input type="checkbox"/> pax Loading port _____ Unloading port _____	
Commodity _____ Volume _____ <input type="checkbox"/> MT <input type="checkbox"/> TEU <input type="checkbox"/> CuM <input type="checkbox"/> pax Loading port _____ Unloading port _____		Commodity _____ Volume _____ <input type="checkbox"/> MT <input type="checkbox"/> TEU <input type="checkbox"/> CuM <input type="checkbox"/> pax Loading port _____ Unloading port _____	
Commodity _____ Volume _____ <input type="checkbox"/> MT <input type="checkbox"/> TEU <input type="checkbox"/> CuM <input type="checkbox"/> pax Loading port _____ Unloading port _____		Commodity _____ Volume _____ <input type="checkbox"/> MT <input type="checkbox"/> TEU <input type="checkbox"/> CuM <input type="checkbox"/> pax Loading port _____ Unloading port _____	
Commodity _____ Volume _____ <input type="checkbox"/> MT <input type="checkbox"/> TEU <input type="checkbox"/> CuM <input type="checkbox"/> pax Loading port _____ Unloading port _____		Commodity _____ Volume _____ <input type="checkbox"/> MT <input type="checkbox"/> TEU <input type="checkbox"/> CuM <input type="checkbox"/> pax Loading port _____ Unloading port _____	
Commodity _____ Volume _____ <input type="checkbox"/> MT <input type="checkbox"/> TEU <input type="checkbox"/> CuM <input type="checkbox"/> pax Loading port _____ Unloading port _____		Commodity _____ Volume _____ <input type="checkbox"/> MT <input type="checkbox"/> TEU <input type="checkbox"/> CuM <input type="checkbox"/> pax Loading port _____ Unloading port _____	
Commodity _____ Volume _____ <input type="checkbox"/> MT <input type="checkbox"/> TEU <input type="checkbox"/> CuM <input type="checkbox"/> pax Loading port _____ Unloading port _____		Commodity _____ Volume _____ <input type="checkbox"/> MT <input type="checkbox"/> TEU <input type="checkbox"/> CuM <input type="checkbox"/> pax Loading port _____ Unloading port _____	
19	Total volume carried	_____ MT/year _____ passengers/yr	_____ MT/year _____ passengers/yr
20	Number of voyages per year		
21	Ship idle days per year	due to breakdown _____ days due to lack of cargo _____ days due to maintenance _____ days others _____ days	due to breakdown _____ days due to lack of cargo _____ days due to maintenance _____ days others _____ days
22	Ship operation days	at sea _____ days at port _____ days	at sea _____ days at port _____ days
23	Number of times sent to dock maintenance	in the last 3 years _____ in the last 5 years _____	in the last 3 years _____ in the last 5 years _____
24	Name and location of dockyard	name _____ city _____	name _____ city _____
25	Average days for dockyard maintenance per visit	dock time _____ days Floating time _____ days	dock time _____ days Floating time _____ days
26	Frequency of major (i.e. have to be idle) maintenance	Hull/deck _____ times per year Mechanical _____ times per year Total _____ times per year	Hull/deck _____ times per year Mechanical _____ times per year Total _____ times per year
27	Total crew related expenses/year	wages _____ <input type="checkbox"/> Rp food _____ <input type="checkbox"/> US\$	wages _____ <input type="checkbox"/> Rp food _____ <input type="checkbox"/> US\$
28	Ship store expense/yr (spare parts, consumables, etc.)	<input type="checkbox"/> Rp <input type="checkbox"/> US\$	<input type="checkbox"/> Rp <input type="checkbox"/> US\$

29	Total fixed cost (Regular basic expense even without operation)	<input type="checkbox"/> Rp /day,month <input type="checkbox"/> US\$ /day,month	<input type="checkbox"/> Rp /day,month <input type="checkbox"/> US\$ /day,month
30	Annual insurance cost	<input type="checkbox"/> Rp <input type="checkbox"/> US\$	<input type="checkbox"/> Rp <input type="checkbox"/> US\$
31	Annual cost for repair/maintenance	<input type="checkbox"/> Rp <input type="checkbox"/> US\$	<input type="checkbox"/> Rp <input type="checkbox"/> US\$
32	Annual Lubricating oil cost	<input type="checkbox"/> Rp <input type="checkbox"/> US\$	<input type="checkbox"/> Rp <input type="checkbox"/> US\$
33	Administration cost for all ships (answer only once)	<input type="checkbox"/> Rp <input type="checkbox"/> US\$	
34	Port charges / call (incl. Berthage, anchorage, pilotage)	<input type="checkbox"/> Rp <input type="checkbox"/> US\$	<input type="checkbox"/> Rp <input type="checkbox"/> US\$
35	Annual stevedore cost per year	<input type="checkbox"/> Rp <input type="checkbox"/> US\$	<input type="checkbox"/> Rp <input type="checkbox"/> US\$
	Fuel consumption per year	volume _____ MT/year cost _____ <input type="checkbox"/> Rp _____ <input type="checkbox"/> US\$	volume _____ MT/year cost _____ <input type="checkbox"/> Rp _____ <input type="checkbox"/> US\$
36	Agency fee per call	cost: <input type="checkbox"/> Rp <input type="checkbox"/> US\$	cost: <input type="checkbox"/> Rp <input type="checkbox"/> US\$
37	Other expenses	<input type="checkbox"/> Rp _____ <input type="checkbox"/> US\$ _____	<input type="checkbox"/> Rp _____ <input type="checkbox"/> US\$ _____

2.1.2. Shipper and Forwarders Interview Form

Company Code No. _____ (refer to company list)

S/N _____

SHIPPERS & FORWARDERS INTERVIEW

- 1 Year of establishment _____
- 2 Ownership type
☐ Private (Indonesian) ☐ Joint Venture, please indicate nationality of mother companies
☐ State-owned ☐ All Indonesian
 ☐ Indonesian and Foreign, pls specify _____

- 3 Service offered (check if available) and revenue and cost contribution to company

		Share in total company revenue								
		0~10%	10~20%	20~30%	30~40%	40~50%	50~70%	70~80%	80~90%	90~100%
<input type="checkbox"/>	Warehousing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Trucking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Agency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Customs Clearance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Wholesale/Retail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Manufacturing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Agriculture/Mining	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Petroleum	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	others (specify)									
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 4 Organization and Manpower

Draw the company organization chart identifying headquarters and local offices

- 5 Indicate the manpower of your company

	No. of personnel	working days/week	working hours per day
Workers for operation			
Head Office			
Others			

6 Top 5 cargo shipped by your company

	Main cargo	Ports of shipment		Cargo volume (MT)		
		From	To	2000	2001	2002
1						
2						
3						
4						
5						

7 Logistics Facilities

item quantity/unit
 Trucks _____ units
 Warehouses _____ units _____ area in sq. m.
 Land _____ area in sq. m.
 Others (please enumerate and describe):

Cargo handling volume	1998	1999	2000	2001	2002
Conventional/bulk cargo in MT					
Container volume in TEU					

9 Kindly provide us with your freight rates in relation to origin and destination, for the top 5 commodities handled in 2002.

i. _____ fare: _____ ☐ /MT ☐ /TEU ☐ /CuM
 ii. _____ fare: _____ ☐ /MT ☐ /TEU ☐ /CuM
 iii. _____ fare: _____ ☐ /MT ☐ /TEU ☐ /CuM
 iv. _____ fare: _____ ☐ /MT ☐ /TEU ☐ /CuM
 v. _____ fare: _____ ☐ /MT ☐ /TEU ☐ /CuM

10 Major cost of operation for year 2002, please tick the top 5 item and indicate their approximate share in the total company cost

(select top five only)	0-10%	10-20%	20-30%	30-40%	40-50%	60-70%	70-80%	80-90%	90-100%
<input type="checkbox"/> salaries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> shipping cost	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> administration cost	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> maintenance and repair	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> taxes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> loans payments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> truck operation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> liability claims	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 11 How would you rate the following aspects of Indonesian freight shipping service ?
Please consider the importance of each item when you choose shipping company.

	Very bad	Bad	So-so	Good	Very good	No opinion	Rank
Price	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Reliability of schedule	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Reliability in preserving cargo state	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Security against loss and pilferage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Speed of delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Cargo information and monitoring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Carrying capacity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Convenience of scheduling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Other important aspects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____

- 12 What are the major points of concern as an Indonesian shipper or forwarder? Please rank the following points according to importance - "1" is the most important.

	Rank	Specific description
Revenue maximization	_____	_____
Financial resources	_____	_____
Cost cutting in operation	_____	_____
Personnel development	_____	_____
Organizational strength	_____	_____
Safety in operation	_____	_____
Marketing of the company	_____	_____
Environmental consideration	_____	_____
Implementation of new technology	_____	_____
Others (please specify)	_____	_____
_____	_____	_____
_____	_____	_____

- 13 What do you consider is the most significant obstacle for the improvement and modernization of your company's management? Please rank the following points according to importance - "1" is the most important.

	Rank	Specific description
Conventional system in industry	_____	_____
Lack of human resources	_____	_____
Poor port operation/facilities	_____	_____
Regulation and its implementation	_____	_____
High rate of invisible cost	_____	_____
Lack of information technology	_____	_____
Lack of land	_____	_____
Lack of good inter-modal facilities	_____	_____
Cumbersome documentations	_____	_____
Lack of finance	_____	_____
Others (please specify)	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

14 What should the government do to improve Indonesian Domestic Freight Shipping Industry

i. ... With regards to improving the plight of shippers or forwarders

ii. ... With regards to port services (specify port name)

iii. ... With regards to cargo insurance

iv. ... With regards to governance and regulation of the domestic freight industry

v. ... With regards to documentation procedures

v. ... With regards to any other issue (please specify and give a brief description

2.2 The Second Industry Interview Survey Form

SHIPPING COMPANY INTERVIEW

Name of Company : _____

1. Number of vessel (Commercial vessel) _____
2. Method of finance (All (100%)/Major (99%-50%/Minor (49%-10%)/Exceptional (9%-0%) :
 - (1) Own fund
 - (2) Foreign loan (Interest rate/Period/Share/Paid back or not it)
 - (3) Government loan (Interest rate/Period/Share/Paid back or no it)
 - (4) Domestic Bank loan (Interest rate/Period/Share/Paid back or no it).....
.....
3. Problem of foreign loan:
If yes, please description of problem
 - (1) Guarantee
.....
 - (2) Interest rate
.....
 - (3) Collateral
.....
 - (4) Regulation
.....
 - (5) Others
.....
4. Problem of government loan:
If yes, please description of problem
 - (1) Guarantee
.....
 - (2) Interest rate
.....
 - (3) Collateral
.....
 - (4) Regulation
.....
 - (5) Others
.....

5. Problem of domestic bank loan:

If yes, please description of problem

(1) Guarantee

.....

(2) Interest rate

.....

(3) Collateral

.....

(4) Regulation

.....

(5) Others

.....

6. Problems of domestically manufactured ships:

If yes, please description of problem

(1) Price

.....

(2) Quality (Energy efficiency, Operationally, Troubles)

.....

(3) Maintenance and rehabilitation easiness

.....

(4) Durability

.....

(5) Equipment durability (Sailing, Communication, Loading & Unloading, Service facilities)

.....

(6) Others

.....

7. Problems of port:

If yes, please description of problem

(1) Berth, basin area (anchoring area), breakwater, water way

.....

(2) Facilities (Loading and Unloading))

.....

(3) Forwarding service

.....

(4) Custom control and inspection

.....

(5) Transfer cargo (Reloading)

.....

(6) Storage

.....
(7) Connecting road

.....
(8) Communication

.....
(9) Safety

.....
(10) Port Management

.....
(11) Others

8. Problems of pioneer shipping :

If yes, please description of problem

(1) Insufficient cargo

.....
(2) Insufficient subsidy

.....
(3) Insufficient port facilities (berth, anchoring area, breakwater, water ways, etc)

.....
(4) Insufficient port facilities (Loading and Unloading)

.....
(5) Forwarding service

.....
(6) Storage

.....
(7) Connecting road

.....
(8) Communication

.....
(9) Safety

.....
(10) Port Management

.....
(11) Others

ATTACHMENT CHAPTER 3

3.1 Introductory Workshop on the Indonesian Shipping and Shipbuilding Development

3.1.1. What is the Meaning of Modernization of Marine Industries? (Prof. Emeritus Koyama – JICA Study Team)

What does it mean.....

Modernization of Marine Industries

2002.12.19.
Professor Takeo Koyama
JICA Team

Impact of IT in Industrial Structure

Integrated / Centralized System → Collaborative / Distributed System

The diagram illustrates the impact of IT on industrial structure. On the left, a pyramid represents an 'Integrated / Centralized System'. An arrow points to the right, where a cloud-like shape represents a 'Collaborative / Distributed System'.

Collaboration of Competent Partners Offers Smart and Competitive Solutions

The diagram shows a collection of interlocking puzzle pieces in various colors (green, yellow, orange, purple) arranged in a circular pattern, symbolizing the collaboration of competent partners.

Quality is the Key for Effective Collaboration

Collaboration can not be achieved without partner's confidence.

ISO 9000 series is the global standard for process quality and, at the same time, a passport for collaborative business.

Success of industrialization is based on quality control.
Japan⇒US, EU ⇒ China

The diagram shows the PDCA cycle: Plan, Do, Check, Act. It is a continuous loop with arrows indicating the flow from Plan to Do, Do to Check, Check to Act, and Act back to Plan.

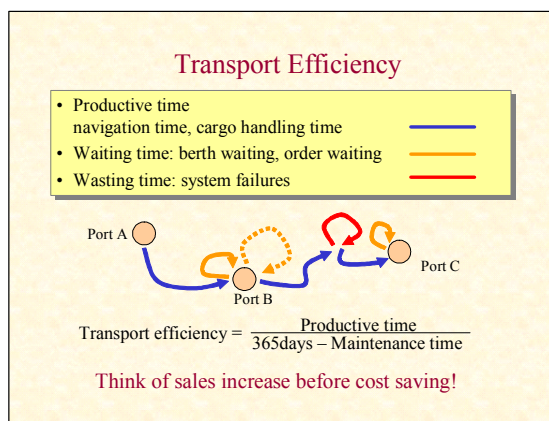
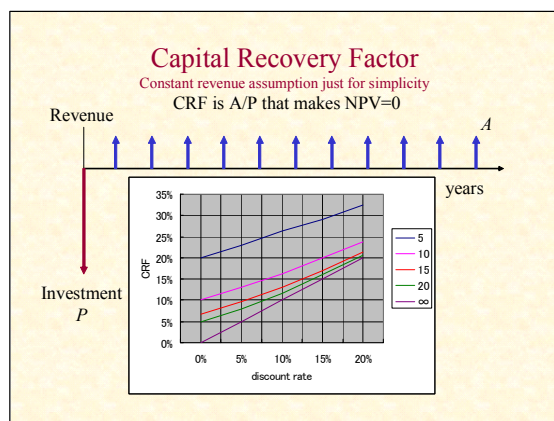
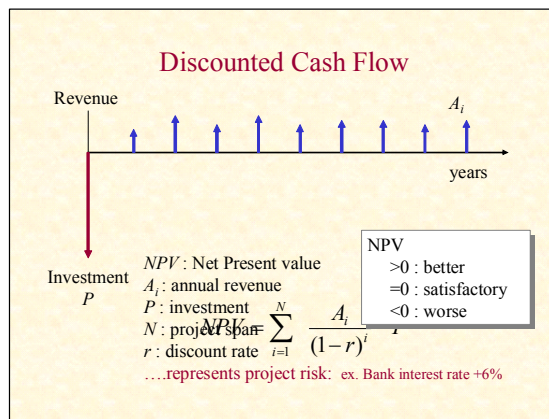
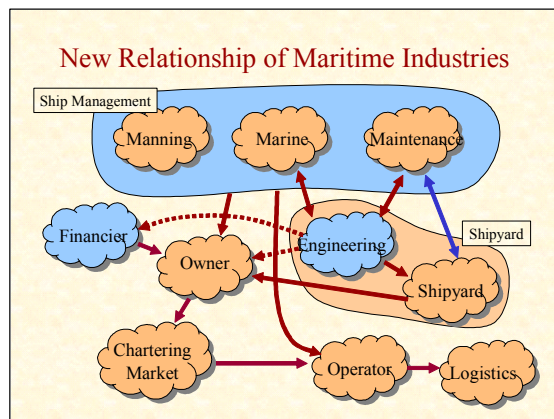
Establishment of PDCA cycle yields continuous improvement: "High quality is less expensive".

Distributed Shipping Functionalities

The diagram is an organizational chart showing the distribution of shipping functionalities. It starts with 'Owner' and 'Operator' at the top. 'Owner' is linked to 'Asset Owner' and 'Ship Management'. 'Operator' is linked to 'Operator' (a sub-entity), 'Special Cargo Operator' (Tanker, Bulk-carrier), 'General Cargo Operator' (Container ship), and 'Logistics'. A note specifies 'NVO: Non Vessel Operator'.

Global / Domestic Logistics

The diagram illustrates global logistics flow. It shows 'Forwarder A' and 'Forwarder B' connected by 'Shipping lines'. Below them, a large blue arrow represents 'Logistics' with the text 'Global door to door service using available links (air/ship)'.



- ### Two Aspects of Indonesian Shipping
- Regional / Global competitiveness:
Jawa, Sumatera, Kalimantan and part of Sulawesi have a plenty of sea-borne transportation demand. The area of country should be open in future for the regional economical liberalization. Or, Indonesian domestic shipping serves for regional transport.
 - Pioneer shipping:
Rest of archipelago need the life-line transportation link that serves the infrastructure for the national unification. Even in this case, a sort of competitive environment should be employed for shipping (ex. PFI).
- Individual policy should be applied for each of two aspects.

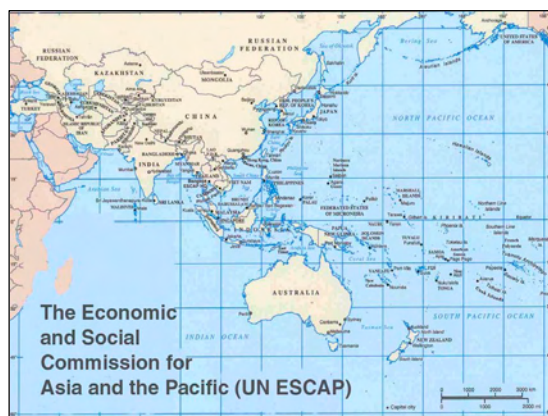


3.1.2. Special Speech from ESCAP Secretary (Satoshi Masuda – ESCAP Secretary)

Workshop on “Development of Indonesian Shipping and Maritime Industry”
19 December 2002, Jakarta

ESCAP
Transport Activities

Satoshi Masuda
Senior Maritime Expert
Transport and Tourism Division



Three Theme Areas of ESCAP

- Reducing poverty
- Managing globalization
- Emerging social issues

ESCAP Transport Activities

3

ESCAP Road Map – Transport Sector



Ministerial Conference on Infrastructure 2001
Seoul Ministerial Declaration on Infrastructure Development
New Delhi Action Plan 2002-2006

ESCAP Transport Activities

4

Transport Sector

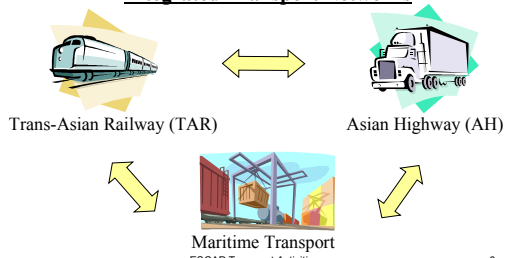
- Integrated transport networks
- Facilitation and logistics

ESCAP Transport Activities

5

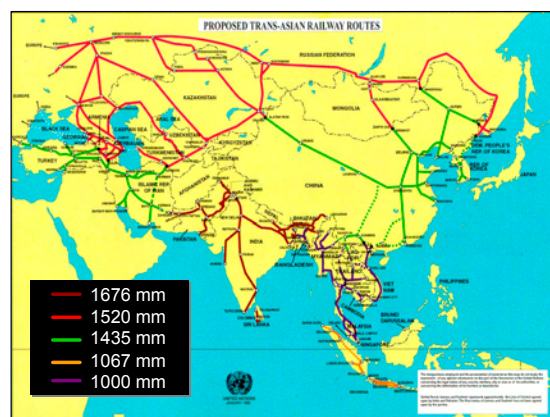
ESCAP Role in Transport Development

Integrated Transport Networks



6

Asian Highway Map (November 2001)



Recent Activities

Policy/legislation

- Liberalization of maritime transport services under WTO GATS
- Maritime policy planning models
- Shipping policy development
- Port tariff
- Multimodal transport

ESCAP Transport Activities

9

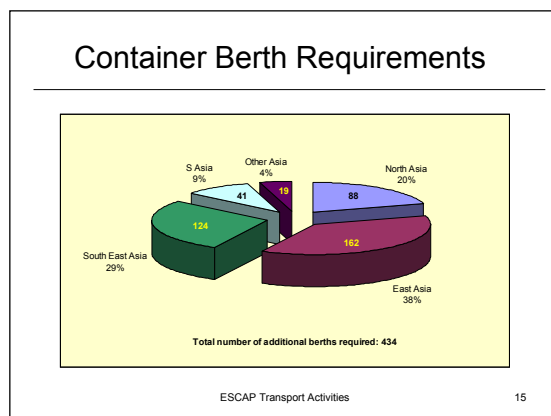
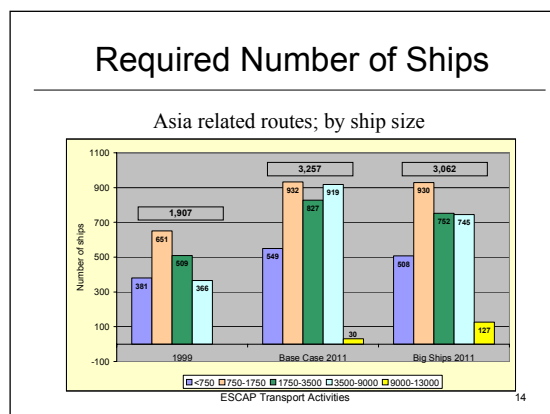
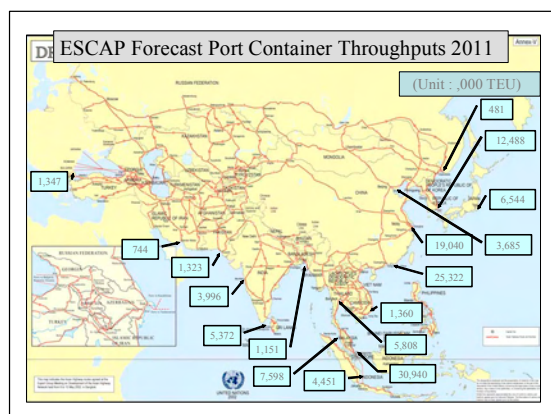
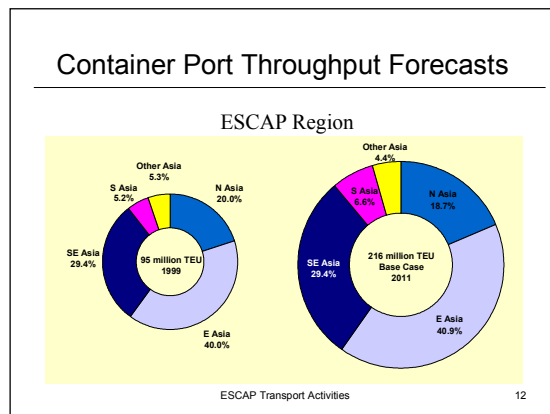
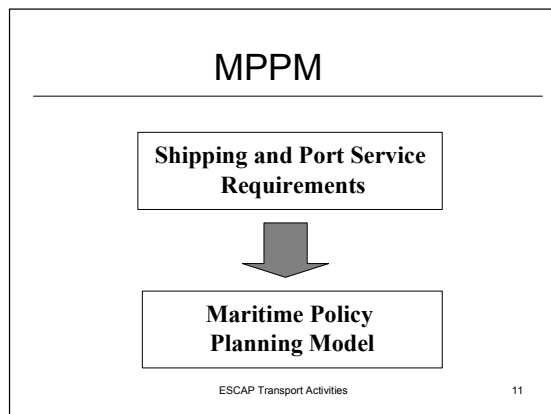
Recent Activities

Approaches to Networking

- Maritime manpower planning, training and employment
- Tripartite meetings – Shipowners, shippers, ports
- Port as logistics center
- Cruise shipping

ESCAP Transport Activities

10



- www.unescap.org/tctd/
- Secretariat: Water Transport
 - Project Activities
 - Publications
 - Maritime Manpower Planning
 - Committee 2002
 - New Publications
 - Selected Events
- ESCAP Transport Activities

- ### Former sections of Transport Div.
- Water transport
 - Land transport
 - General transport, coordination and communication
 - Tourism
- ESCAP Transport Activities

- ### New sections as of August 2002
- Transport facilitation
 - Transport infrastructure
 - Transport policy and tourism
- ESCAP Transport Activities

Transport Facilitation

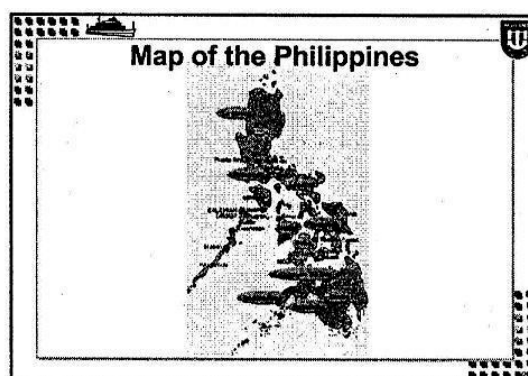
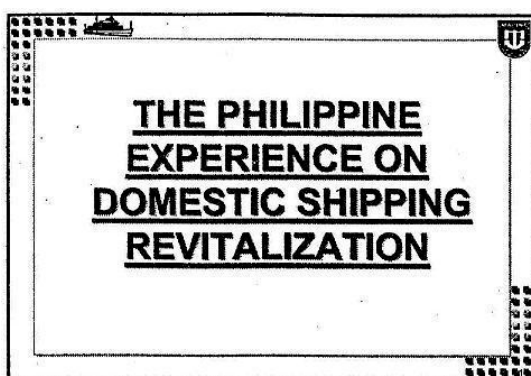
- ❑ Removal of non-physical barriers and inefficiencies.
- ❑ Cross border movement of goods and harmonized legal regimes.
- ❑ Landlocked countries and transit transport.
- ❑ Capacity building to strengthen multimodal transport and logistics.

ESCAP Transport Activities

19

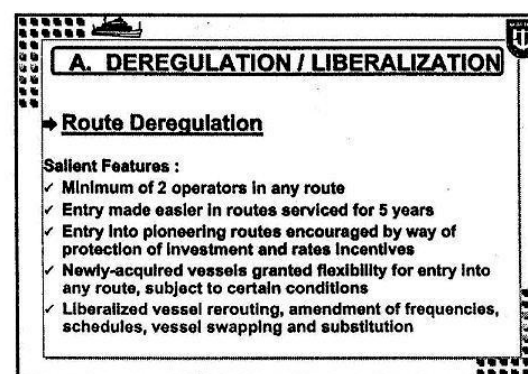
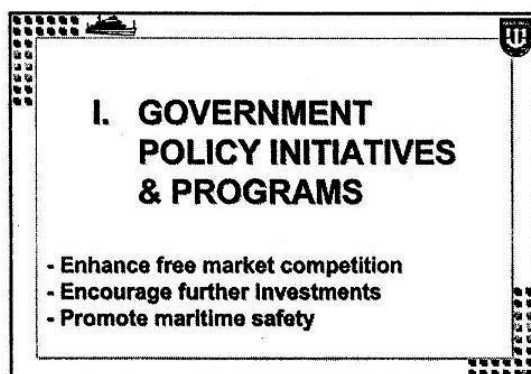
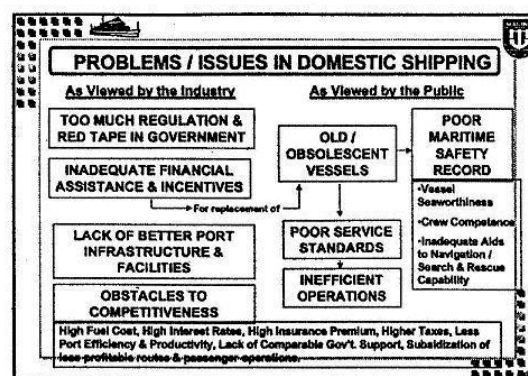
Thank you

3.1.3. Philippines' Experience on Domestic Shipping Revitalization (Atty Glen G. Cabanez – Regional Director of Philippines Maritime Industry Authority)



Philippine Merchant Fleet Profile, 2002

Type of Vessel	No. of Vessels	Average Age	Average GRT	Total GRT
Passenger-Ferry	307	10	53	16,111
Passenger-Cargo	1,430	8	327	469,633
General Cargo	1,745	13	338	588,645
Container	21	25	2,647	55,591
Liquid Cargo/ Lighterage	28	15	459	12,862
Barging	217	18	589	127,776
Tanker	197	16	916	180,443
Towing/Salvage	475	19	80	38,151
Pleasure	101	7	19	1,880
Pilotage	12	33	14	166
Others	1,152	6	54	62,343
TOTAL	5,694	12	274	1,553,601



A. DEREGULATION / LIBERALIZATION

→ **Rates Deregulation**

Salient Features :

- ✓ 1st & 2nd Class Passage rates deregulated
- ✓ Class "A", "B" and "C" freight rates deregulated
- ✓ Reefer, Livestock and Transit rates deregulated
- ✓ Ad Valorem rates abolished
- ✓ Fork Tariff System for regulated rates

B. STREAMLINED & LIBERALIZED ADMINISTRATION

→ **Age & size restrictions on vessel acquisitions removed**

→ **Facilitated resolution of franchise applications/ complaints**

- Summary procedures
- Compromise & arbitration

B. STREAMLINED & LIBERALIZED ADMINISTRATION

→ **Shortened Port Clearance procedures**

- lesser copies of required documents
- only the Phil. Ports Authority to clear vessels

→ **Improved delivery of services**

- rationalized documentary requirements & procedures

C. INCENTIVES & FINANCING PROGRAM

→ **Investment Priorities Plan (IPP)**
Exemption from import duties & taxes

- 1990-1st Sem 98: 159 vessels = US\$ 309.04 M

→ **Domestic Shipping Modernization Program (DSMP):** Financing for vessel importations or local construction = JPY 15 B = PhP 3.91 B

- As of 31 Dec. 1997: 97 vessels = PhP 2.73 B

D. MARITIME SAFETY ENHANCEMENT

→ **Vessel Classification**

→ **Phil. Merchant Marine Rules & Regulations revised/updated**

→ **STCW Convention**

→ **Maritime education/ training/ certification upgrading**

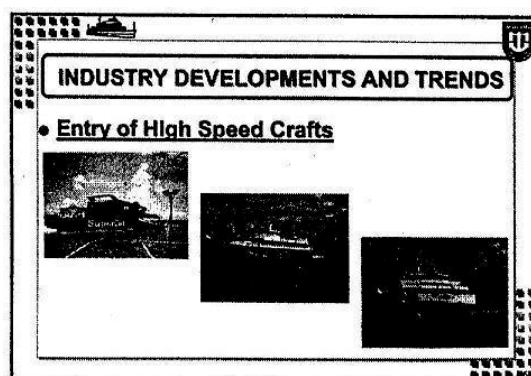
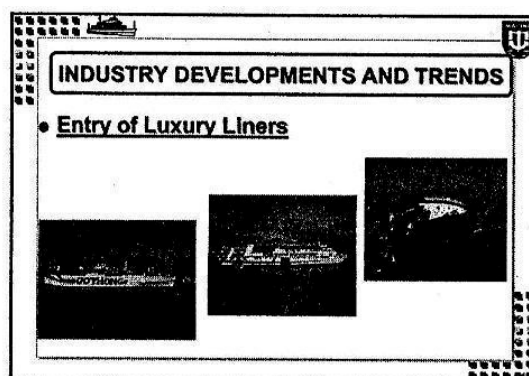
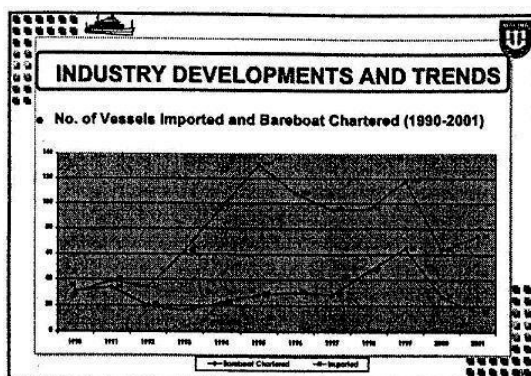
→ **Maritime Safety Improvement Projects**

→ **NSM/ISM Code implementation for selected domestic vessels**

INDUSTRY DEVELOPMENTS AND TRENDS

• No. of New Companies Going Into the Domestic Shipping Business (1991-2001)

Year	No. of New Companies
1991	10
1992	15
1993	20
1994	25
1995	30
1996	35
1997	40
1998	45
1999	50
2000	55
2001	60



A. OVERALL GOALS/OBJECTIVES

- Domestic Shipping Fleet + Overseas Fleet
 - ↳ Efficient movement of raw materials/products for domestic & international markets
 - ↳ to support the country's drive for global competitiveness
- Domestic Shipping Fleet
 - * adequate * efficient * economical
 - * with acceptable standards
 - ↳ catering to/ supporting the transport requirements of:
 - * agriculture * trade & industry * tourism

A. OVERALL GOALS/OBJECTIVES

- Seaworthy vessels
 - ↳ manned by well-trained/ competent officers & crew
 - ↳ sourced from & effectively maintained by a developed local shipbuilding/ repair industry.

B. FUTURE PROGRAMS

- Continue to promote Fleet Modernization & Attract More Investments
 - ↳ Comprehensive vessel retirement-cum-replacement policy & program
 - ↳ Maritime Credit Corporation concept
- Foster Improvements in service standards
 - ↳ Institutionalize monitoring systems

3.1.4. What is expected to JICA Study? (Barens Th. Saragih – INSA)

<p>Discussion Paper on</p> <p>Development of Shipping and Shipbuilding Industry</p> <p>J I C A</p> <p>Jakarta, 19 December 2002</p> <p>Barens TH Saragih Chairman, I N S A</p>	<p>Shipping Industry</p> <p>Targets</p> <ol style="list-style-type: none"> 1. To turn Indonesia as Ship-Owners' Nation, rather than Users' Nation 2. To enhance the carriage of cargo: 75 - 80% domestic shipping routes (cabotage) 30 - 35% share on export-import (fair share through negotiation)
<p>Continued</p> <ol style="list-style-type: none"> 3. To reduce the huge deficit on Balance of trade in services and provide employment opportunities 4. To enhance Fleet-rejuvenation and expansion in cooperation with ship building industry 	<p>Domestic Shipping</p> <ul style="list-style-type: none"> = Plays as infra-structure of the Nation Building = To enhance the mobility of people and cargo between the population centers in the archipelago = Need to harmonize shipping and Port technologies through specialization of Ports and Terminals according to types of cargo handled = Promotion of Ro-Ro Passenger Ships
<p>Shipping Industry Orientation</p> <p># Efficient Shipping and Terminals for:</p> <ul style="list-style-type: none"> - Passenger and Ferry Services - Break bulk including Ro-Ro Operations - Container Shipping - Dry Bulk including Tug and Bays - Crude Oil Carrier - Refined Product Carrier - LNG Carrier - LPG Terminals - Chemical (Organic) Carrier 	<p>Seaport Policy - Master Plan Objectives</p> <ul style="list-style-type: none"> # To meet demands of country's industrialization process # To meet the entire flow of sea borne trades # To take advantages of nature of shipping potentials to develop ports for better serving the trade
<p>Continued</p> <ul style="list-style-type: none"> # To meet the inter-support between port and port complexes # To set up better connection of sea-port system and network of sail, road and inland waterways 	<p>Master Plan Orientation</p> <ul style="list-style-type: none"> # To upgrade the existing port # To constant keep sea port in key economic area as international transshipment Hub Port # To develop specialized ports for passengers, break bulk, liquid and dry bulk cargoes

Continued

- # To develop local supporting ports
- # To develop maritime services and related infra structure
- # To apply advanced and modern technologies in port management and operation

Ship Building Industry

- = To meet the demand of National Shipping Industry
- = At a competitive standards and costs
- = Employment opportunity for skilled and trained personnel

Shipping and Shipbuilding Industry

- = To provide financial back up for new buildings
- = To enhance shipping logistics market for spare parts and shipbuilding materials
- = To enhance small and medium size industry participating in shipbuilding

Funding the Industry

Government to assign a Non-Bank Financial Institutions the tasks:

- = to acquire financial services, both domestic and foreign loans for shipbuilding
- = to act, on behalf of Government, as guarantor of the loans and placing ships as collateral
- = to act as Supervisor of the Loan Agreement and Executor, if necessary

Thank you

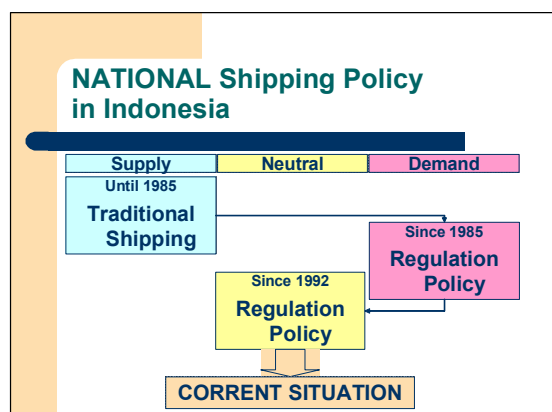
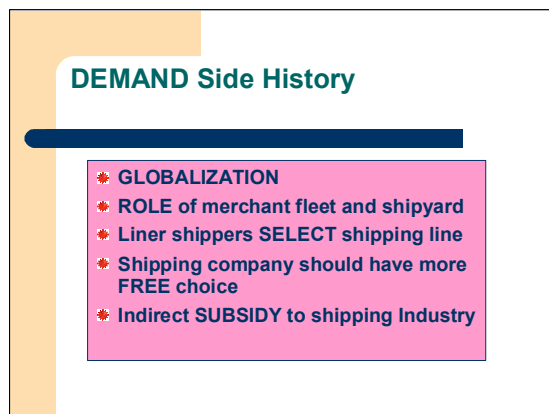
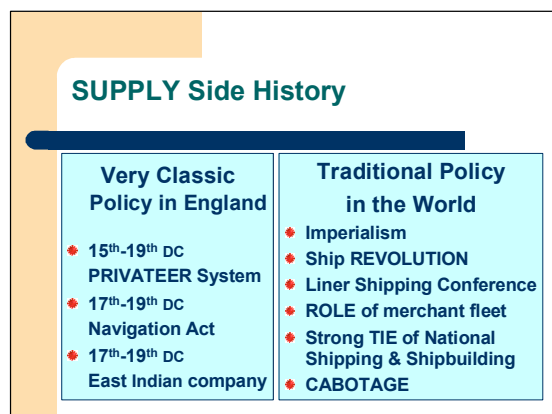
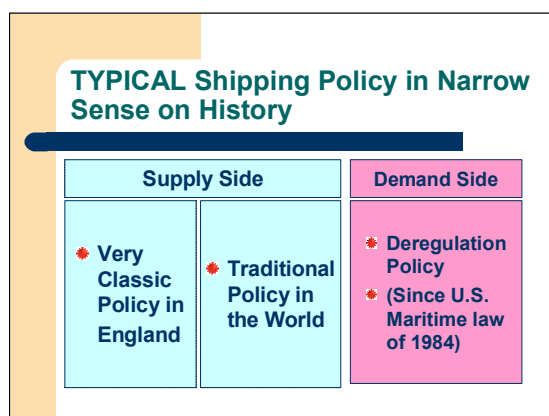
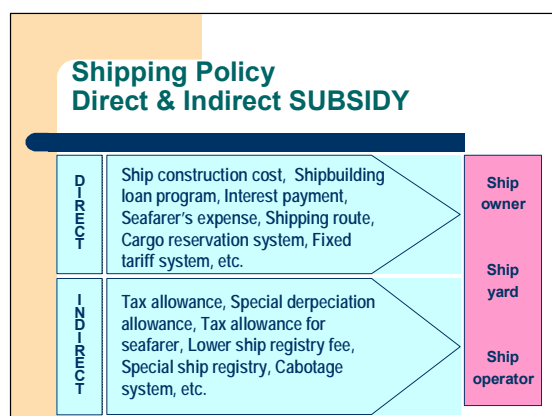
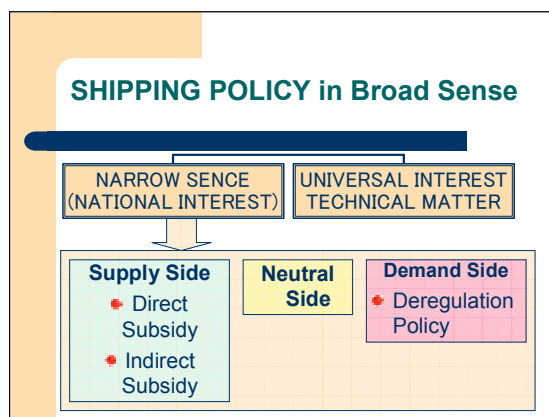
3.2 Internal Workshop on Sectoral Issue Findings

3.2.1. Maritime Transport Policy (Ohtake Kunihiro – JICA Study Team)

SHIPPING POLICY
in Narrow Sense as Indonesian
National Shipping Strategy in
the 21st Century

Prof.OHTAKE Kunihiro

March 12, 2003
Hotel President



Analyze The Share of Indonesian Shipping in Domestic Trade (%)

Service Type	Operation	Ship-owners		Indonesian Seafarers
	M & OP	I.N.F	F.F.	
Passenger Service	100	100	0	100
(Cargo) Liner	100	b	100-b	50 + b/2
Traditional	100	100	0	100
Pioneer	100	100	0	100
Special	100	e	100 – e	50 + e/2

M&OP: Marketing & Operation
I.N.F.: Indonesia National Flag
F.F.: Foreign Flag

