



Industry Forum

27th March 2009





**Port Kembla Port Corporation - Industry Forum
Friday 27th March 2009**

Introduction

The Port Kembla Port Corporation hosted an Industry Forum on Friday 27th March 2009 bringing together port users and stakeholders.

The aim of the forum was to look at ways in which the Corporation could/can work in collaboration and cooperation with customers, stakeholders and the community for the future growth and development of the port.

Objectives

The objectives of the forum were:

1. To discuss current issues facing the port community and the future of PKPC,
2. To highlight key achievements and potential for better working partnerships,
3. To create a networking opportunity to share ideas – allow all parties to have a say,
4. To identify possible investment opportunities.

Process

A number of presentations were given to address topic areas/ issues as identified in the recent customer survey. Working group sessions were undertaken in order to initiate discussion and gain valuable feedback regarding whole of port issues.

Activity	Process
Chairman's Address Nick Whitlam	The Chairman welcomed dignitaries and participants, outlined the process for the day and expected benefits.
Official Welcome Noreen Hay	The Member for Wollongong welcomed guests and introduced Minister for Ports Joe Tripodi MP.
Presentation by the Hon. Joe Tripodi MP, Minister for Ports & Waterways	Minister Tripodi gave a presentation on the recent achievements at the port of Port Kembla, outlining details of future plans for the development of the Outer Harbour.
CEO's Presentation 1 Dom Figliomeni	The CEO spoke about PKPC as customer focused organisation, he outlined the key findings from the recent customer survey and spoke about the various opportunities for investment in the Illawarra region.
Roads Presentation Nick Boyd	The RTA presented on the capacity of local roads and noted that in general local roads had a good safety record. Mention was also made on projects under way to improve safety where possible.
Rail Presentation David Mayo	Pacific National noted that while currently there is rail capacity it is important that consideration is given to the future needs of rail users.
AQIS Presentation Bob Murphy	AQIS outlined the requirements of import cargo to ensure that Australia's bio security is not compromised. AQIS noted that it was prepared to work with importers to address quarantine issues.
Working Group Session 1	To initiate table discussion – participants were asked the question: What have you heard so far, any issues, questions or concerns you would like raised?
Working Group Session 2	Participants were asked to work through the following questions: <ol style="list-style-type: none"> 1) <i>What direction should Port Kembla Port Corporation head to inspire investment in the Illawarra over the next five years? (Blue)</i> 2) <i>What key challenges do you face in your business/organisation over next three to five years? (Yellow)</i> 3) <i>How can Port Kembla Port Corporation assist you to meet those challenges? (Pink)</i> Reference Appendix A for participant responses.

CEO's Presentation 2 Dom Figliomeni	The CEO introduced the rationale behind the introduction of a new pricing strategy concept. He indicated that further research was being undertaken and was seeking input from stakeholders.
Pricing Presentation Victor Keddis	Presentation from Inovyse. Mr Keddis gave an overview of the purpose and options/alternatives for a change in the pricing strategy.
Working Group Session 3	<p>Participants were asked to work through the following questions:</p> <p><u>Shipping Cluster</u></p> <p>1a) Thoughts on the pricing strategy - positives, negatives and questions needing an answer. 1b) Review of today's activities – suggestions for future forums.</p> <p><u>Logistics/Service Agencies</u></p> <p>2a) Communication. 2b) Review of today's activities – suggestions for future forums.</p> <p>Reference Appendix B for General Feedback and Comments</p>
Closing Remarks Hon. Joe Tripodi MP, Minister for Ports & Waterways Dom Figliomeni Nick Whitlam	<p>The Minister gave an overview of the key messages emerging from the discussions. The CEO outlined the next steps which included collating the output from the day into topic streams, identifying those matters under the control of PKPC and providing annual feedback on progress made on those matters.</p> <p>The Chairman thanked all for participating in this important first feedback forum between port customers, community representatives and stakeholders.</p>

Outcomes Summary

The following topic streams were identified as areas of relevance for the future growth and development of the port and port users:

- Road
- Rail
- Port Infrastructure/Outer Harbour Development
- Pricing
- Communication
- Port Operations
- Land Availability
- Logistics/Supply Chain
- General
- Forum Feedback

ROAD

Issue	Stakeholder Suggestions/Comments
Road Infrastructure	<ul style="list-style-type: none"> • Ensuring sufficient road capacity • Capacity of Picton Road/Mt Ousley
Competitive Rates	<ul style="list-style-type: none"> • Strong competition in road services

RAIL

Issue	Stakeholder Suggestions/Comments
Intermodal shift - Road to Rail	<ul style="list-style-type: none"> • Ensuring rail capacity is sufficient to meet future port capacity • Movement from road to rail will improve community support for port operations
Rail infrastructure	<ul style="list-style-type: none"> • Need to ensure sufficient capacity for freight • Competition between commuter services and freight demand • Strategic rail links to the west (Maldon Dombarton/Moss Vale) • Revitalisation of country rail lines • Remove bottlenecking at key points on rail network • Ensure capacity to cater for forecast/future growth
Government	<ul style="list-style-type: none"> • Influence/lobby Government on necessary rail requirements

PORT INFRASTRUCTURE/OUTER HARBOUR DEVELOPMENT

Issue	Stakeholder Suggestions/Comments
Common User Facilities	<ul style="list-style-type: none"> • Provide competitive and efficient common user facilities • Need for increased berths/facilities for assorted bulk products • Efficient materials handling to ensure rapid ship turnaround
Storage	<ul style="list-style-type: none"> • Ensure sufficient land storage facilities available to support berth capacities
Infrastructure planning	<ul style="list-style-type: none"> • Ensure adequate infrastructure capacity ahead of demand (forward planning) • Planning for support services (eg tug facility) and small vessel repair facility
Outer Harbour Development	<ul style="list-style-type: none"> • Work closely with Government and industry to develop the Outer Harbour • Continue to diversify port trade through range of facilities in new development

PRICING

Issue	Stakeholder Suggestions/Comments
Comparative Pricing	<ul style="list-style-type: none"> • How does PK pricing compare to other Eastern seaboard ports? • Ensure PKPC remains as cost focussed as its customers • Ensure pricing does not increase at unrealistic rates
Flexibility	<ul style="list-style-type: none"> • PKPC should be flexible in pricing in order to assist shipping lines to increase total port throughput • Flexible pricing strategy toward various industry sectors

COMMUNICATION

Issue	Stakeholder Suggestions/Comments
Stakeholder Interaction	<ul style="list-style-type: none"> • Work closely with stakeholders to ensure port planning and investment priorities do not conflict • Looking to PKPC to enhance its role as a communication 'conduit' for business related opportunities • PKPC as an "information centre" • Establish directory of service providers (website) • Continue to provide regular updates of developments/opportunities • Clear investment plan/timeline giving stakeholders clear picture for 3, 5,7 year predictions/plans
Community	<ul style="list-style-type: none"> • Use current channels to ensure community adopt a balanced view of development • Maintain ongoing communications and engagement with community regarding developments, environmental impacts and social issues.
Communication Methods	<ul style="list-style-type: none"> • Continue/enhance use of electronic information delivery

PORT OPERATIONS

Issue	Stakeholder Suggestions/Comments
Vessel Priorities	<ul style="list-style-type: none">• Continue to prioritise tidal vessel movements• Transparency of vessel prioritising• Minimising changes to berthing schedules
Pilotage	<ul style="list-style-type: none">• Address pilot fatigue issues• Ensure sufficient pilot availability
Third Party Providers	<ul style="list-style-type: none">• Maintain competition for provision of port services
Environmental	<ul style="list-style-type: none">• Consider community concerns on environmental issues in the port
Dredging	<ul style="list-style-type: none">• Adopt a single plan approach to maintenance dredging

LAND AVAILABILITY

Issue	Stakeholder Suggestions/Comments
Land Use	<ul style="list-style-type: none">• Ensure sufficient buffer zones to prevent urban encroachment• Planning for future land requirements to support port capacity

LOGISTICS/SUPPLY CHAIN

Issue	Stakeholder Suggestions/Comments
Supply Chain Management	<ul style="list-style-type: none">• Integration of import/export logistic chains is vital• PKPC to be a proactive facilitator in land based logistics

GENERAL

Issue	Stakeholder Suggestions/Comments
Role of Government	<ul style="list-style-type: none">• Ensure Government maintains balance between support for community and industry
	<ul style="list-style-type: none">• Suggest (state) Government provides a review mechanism for excessive monopolistic pricing policy

FORUM FEEDBACK

Issue	Stakeholder Suggestions/Comments
Topic Selection	<ul style="list-style-type: none">• Need to focus on specific issues
Format	<ul style="list-style-type: none">• Shorter sessions with a more focussed topic areas• Consider focus groups to develop solutions not just problems

Appendix A – Working Session 2

What direction should PKPC head to inspire investment in the Illawarra over the next five years?	What key challenges do you face in your business/organisation over the next three to five years?	How can PKPC assist you to meet those challenges?
No response.	Storage Capacity - Land	Ensure port charges don't increase at unrealistic rates
<p>1 - Overall development strategy and provide infrastructure on forecast demand. 2 - Provide cost incentives to port service providers. 3 - Reduce red tape (if any). 4 - Make regulations that are conducive to promote investment. 5 - Cater to all types of cargo - diversify. 6 - Look for public/private partnerships. 7 - Overall strategy for the state's three ports. 8 - Rail to cater more for other types of cargo to achieve 40% on rail. 9 - Ability for the port to cater for 'peak periods'. 10 - Keep all informed of developments in a timely manner.</p>	<p>1 - Retaining viability over the period of the GFC. 2 - Retaining the same level of staff to ensure smooth operations at the end of the GFC. 3 - Increased regulations on a state and federal level - especially relating to the environment.</p>	<p>1 - Keeping costs down. Reduce if possible. 2 - Ensure any systems introduced are standard throughout all Australian ports. 3 - Keep all parties involved, informed and discuss proposed developments with stakeholders.</p>
<p>Provide a functional facility at highly competitive cost. Ensure easy access for PCC and RoRo, no delay to access berths. Security. Take an integrated state base approach to trade facilitation. If new trade to be introduced consider impact on existing trade and customers.</p>	<p>Settling the industry into PK. Ensuring the facilities are adequate to service the trade during peak or exceptional circumstances e.g. quarantined shipments. Assessing that the logistic infrastructure does have the capacity to facilitate industry requirements. If no land available for lay down, ships will bypass. Innovative and flexible style of port management.</p>	<p>Manage costs - both port and service providers especially AAT. Oversight operational activities to ensure the facility functions as intended.</p>
<p>Link effectively to Port Botany. Create efficient logistic links to the port. Reduce cost of and improve port related service provision. Support established users.</p>	<p>Developing and maintaining low cost, effective logistics solutions.</p>	<p>Support us to lower costs and improve flexibility. Reliable low cost service provision. Support the improvement of logistics links to Port Kembla.</p>

Single port management plan. Working with other port authorities (NSW). Use of assets, equipment and knowledge. Land use and develop. Port capacity (throughput).	Imports of steel. Lower costs. Vessel traffic management. Weather changes and impact on navigation. Dredging - maintenance of current berth depths.	Port costs. Forecasting vessel movement - not visible 24 hour to terminal operators. Single plan approach to maintenance dredging.
	Ensuring we maintain a safe and efficient road network. Specifically: Improving road safety on all roads in the Illawarra, Planning for the impacts of future land use on the traffic capacity of the network, Developing and prioritising short term and long term infrastructure works to address identified deficiencies.	Assist with the long term planning and forecasting of future freight volumes - WOLSH Model upgrade. Encourage or facilitate discussion between freight operators ARTC and other stakeholders to identify interim solutions to major infrastructure projects. Promote road safety to operators.
As discussed today, the key to promoting investment is to ensure the entire supply chain is integrated. Port expansion without the requisite road and rail access will result in over capitalisation of port infrastructure.	Supply constraints - the economic crisis has reduced demand for product internationally and domestically. As demand returns the achievement of approvals to operate in an increasingly "green" community. Getting the community to adopt a balanced view of development.	The port has been focussed on non traditional trade growth in recent years. The port's involvement in the coal chain logistics modelling project is an excellent example of the port supporting traditional and new trade. Look forward to continued support for coal growth through Port Kembla.
1 - Work with Government and industry to overcome reliance on single pathways i.e. Mt Ousley (Roads), Viaduct (Rail). 2 - Maintain flexibility for a mix of commodities. ie. New cars may not mix with iron and coal.	1 - Price competitiveness with private infrastructure in Western Australia. 2 - Processing costs and potential location of secondary processing site. 3 - Attracting investment and credit.	
Provide port capacity in excess of demand.	Having sufficient coal chain capacity to meet projected forecast tonnes, Gaining alignment from all stakeholders on what the precise task will be.	As owners of the Inner Harbour terminal, review infrastructure options (with PN) to accommodate more and longer trains, Attempt to influence, were possible, stakeholders to gain alignment of required task.
Keep doing what you are doing e.g. today and pushing to increase the transport infrastructure including port capacity.	Coordination and funding.	Continue your support.

Infrastructure, security and anticrime.	Further development of our product. Obtaining environmental approvals and permits for testing locations.	Thank you for all assistance and help and support so far. Please continue. In some cases we might require some support from PKPC to help to deal with other PK port organisations.
Establish and invest (with Government support) in the infrastructure to support development. Look at innovative delivery methods to deliver infrastructure of appropriate quality and maintenance/asset management principles to support and sustain it.	Communicating with organisations such as PKPC to provide input into solutions.	Remain open to discussion and give/continue to give clear indication of intent and direction.
1 - PKPC need to have more leverage to contain costs imposed by their lessees. 2 - Better road infrastructure. 3 - Have dedicated berths for key commodities. General cargo vessels to be kept on separate general cargo berths.	Costs. Port Kembla is the most expensive port with respect to navigation charges and tugs. The cost to put a vessel in Port Kembla is highest compared to other main ports. Dedicated RoRo and PCTC berths so it does not have to mix high quality fragile cargo with general and bulk cargo.	1 - Quick response to customers challenges. 2 - Reduce costs to make Port Kembla more attractive for project cargos and customers.
Continue to coordinate approach to ensure the road and rail infrastructure issues are resolved - with Maldon/Dombarton as the primary issue.	Costs. Costs. Costs!! Managing increased number of capesize vessels to support increased steelmaking. Managing dredging issues especially from an environmental viewpoint.	Cost control - ensuring PKPC remains as cost focused as your customers are. Continue to support 'tidal' vessel priority access to tide windows. Timely advice of harbour depth issues and working group coordination regarding dredge spoil disposal.
Continue what it is now doing by interacting with the stakeholders in increasing the efficiency of the total system i.e. freight (change to rail) access and port facilities.	Maintaining efficiencies.	By meeting and discussing mutual problems. By keeping the operation efficient and thereby keeping costs low.

Work closely with stakeholders to ensure that the port's planning and investment priorities do not conflict with their stakeholders. This will ensure the continuing growth of the current stakeholders.	Identifying opportunities for growth. Maximising return on current large investments. Responding quickly and positively to our customers requirements.	Develop joint marketing initiatives. Maintain an open and free flow of market information, as well as their infrastructure development plans for the future.
To increase capacity and flexibility of the port. Secure 'no bottle necks' goods receiving operation.	1 - Commence mining. 2 - To secure rail transport arrangements from the mine site to coal terminal.	1 -Stay in touch with us. 2 - Be competitive with your charges.
Correct/provide infrastructure for inland freight i.e. road and rail. Potential customers are looking for lower costs to the port with min holds.	Able to provide suitable storage, keeping costs down. Competition from other ports (Newcastle, VIC and SA). Also matching investment against throughput.	Meeting in holding costs both lease and tonnage levies. Seeking suitable storage areas.
Continue to develop the value proposition for potential investors. Develop investment opportunities (packages) for Australian institutional investors.	Availability of employment (industrial) lands.	Continue to play a lead role in working with land-holders to release and develop industrial land.
Maldon Dombarton rail line, Reduce road traffic, Support supply chain logistics.	Land use planning - SEPP MP - 3 Ports and relationship to Councils planning controls. External port impacts on surrounding community e.g. increased road traffic.	Keeping Council and community informed of projects. Supporting road/rail upgrades e.g. Maldon Dombarton.
Work closely with governments and industry to continue to develop the port - the Outer Harbour. Make Port Kembla most efficient in Australia. Continue to promote infrastructure development e.g. Maldon Dombarton.	Member businesses surviving the GFC i.e. might close in the next 12 months and not be around in the next 3 - 5 years. Competing in global markets - port ensure efficiency and keep charges competitive.	As per the 'Blue Card'.
Ensure that sufficient land is available for port development, Ensure that the port remains safe for shipping.	Improve the PK harbour environment.	Continue to invest time and effort and money in the PK harbour environment. Interact with the community in a clear and transparent manner on environmental issues. Respond to community concerns on environmental issues in the port and on port land.

Provide true common user berths for break bulk operations in its own right, not leased to third parties. Provide those facilities ahead of the port where existing facilities can not cope. Ensure the widest spread of cargo handled to ensure sustainability.	Access to berths with back up in terms of storage and receipt/delivery facilities.	Provide competitive and efficient common user break bulk berths and supporting infrastructure.
Facilitate expansion. Need to provide expansion opportunities on competitive commercial conditions.	Stabilisation of coal market. Sufficient infrastructure below rail/port to allow for capture of increased demand. Community concerns.	Lobby Government to ensure sufficient rail access is made available noting competing interests from commuter demand. Rail model. Ensure expansion does not compromise existing users.
Promote port capacity in advance of exporters demand.	Below rail capacity within the Inner Harbour terminal.	Alignment of capacity with demand for export coal.
Demonstrate it's capacity in logistics management - taking into account the broader community aspects in its development plans, Continue to play a role in regional infrastructure and development issues.	For the heritage park, regaining traction in development and operations once the Maritime precinct development is completed.	Provide indirect and where possible direct support to development of the Heritage Park and conserving and interpreting heritage assets.
1 - Ensure competitive rail access/road access, 2- Provide adequate berth facilities, 3 - Continue with the Outer Harbour development.	Reducing fixed costs during cyclical down turn and retain capacity for next upswing. 2 - Accessing funding/supporting cash flow to enable investment during the down turn to avoid being caught in the next upswing.	To provide strategic port assets for Cement Australia to access on a common user basis (berth and/or unloading facilities).
Be more nationally focussed rather than concentrating on the Illawarra only, that way PK can become "primo inter pares" - first amongst equals.	Total logistic chain management and infrastructure. Land back up road and rail.	By being an integral part of international logistics chains - efficiency, cost and operative. Need to be a proactive facilitator or shore based logistics. Oversight of contractors/terminals.
Infrastructure development.	Berth availability as well as yard space. Pilots and tugs. Space for our ships handling safely within the port limits.	Increase number of pilots. Be aware of the new Panama Canal size vessels after 2014.
Marketing to obtain new trade at Port Kembla to enable further development of berths etc.	Busy trade means berth congestion.	Avoid congestion by either developing berths/wharves. Better communication between agents.

<p>Coordinated approach to logistics solutions across the transport freight sectors. Aligned capacity/commercial/investment across coal chains.</p>	<p>Being able to have a clear view of demand/coal chain capacity so as to be able to make investment decisions for new rolling stock and get timing right.</p>	<p>Creating alignment across the logistics chains with key service providers/operators etc.</p>
<p>Infrastructure - lobby government. Staging areas (land lease) maintenance yards, greater supply chain infrastructure for smaller cargoes i.e. bond stores, PH rack warehouse free cargo etc. Directory of local service providers across the board - public liability and industry need to understand PK is more than a car berth/port.</p>	<p>Congestion. Picking up project opportunities and promoting ourselves as a carrier that calls PK and can service multiple trade lanes and capabilities. Pilot fatigue due to multiple port moves</p>	<p>1 - Transparency of vessel prioritising. 2 - Offer sales leads pertinent to carriers capabilities and trade lanes, assist by promoting partners through networking outlets and advertising. 3 - Address pilot fatigue issues, by addressing congestion. 4 - Directory for service providers published on website (inc gov grants). 5 - Establish email database and send important government and industry announcements and general local information and opportunities. 6 - Advertise tender opportunities on website for new business through port.</p>
<p>Support infrastructure development for sound commercial economic benefits for future business growth.</p>	<p>Better understanding the overall supply chain, the complex interactions to enable opportunities for increased capacity.</p>	<p>Assist in minimising identified supply chain bottlenecks and supporting opportunities for improved capacity.</p>
<p>Build on base. Look to diversity - away from coal. Look for a niche - "Free Port" Promote area as a industrial/tourist port transit.</p>	<p>1 - Rebuild in a new more competitive market both long, medium and short term. 2 - Staff retention and training. 3 - Investment and diversification within the shipping/logistic/transport industries.</p>	<p>1 - Continue to be flexible and keep a strong relationship with us - keeping us abreast of developments and requesting input on our plans and their possibilities. 2 - Statistical information in manageable and easily manipulable formats. 3 - Training programs and opportunities. 4 - Information centre.</p>
<p>Show a clear investment plan and time line to your stakeholders. Give clear indications of market movements over the next 3,5 or 7 years.</p>	<p>Port stabilisation of markets. Quality of transport infrastructure. Ability of private rail operators to remain viable. Meeting the market costs from imported product.</p>	<p>Demonstrate an ability to grow the transport infrastructure to match the coal transport 22K tonnes to 44K tonnes so the break bulk and oil services are not impaired by bulk (coal and grain) trains.</p>

<p>Ensuring that rail modelling and new track design meets expected growth volumes, Ensure integration of new technology is built into the 'green fields' operation e.g. AQIS cameras to speed up process and maximise resources.</p>	<p>Ensuring revenue meets the investment on the rail network, Encouraging new business to rail through our customer base, Ensuring rail capacity meets demand.</p>	<p>By providing specific information relating to expected or forecast volumes by product type. In addition to producer location and their productivity expectations.</p>
<p>Development of the Outer Harbour with the focus on import/export business. This industry has the greatest impact on local economic development and investment, that in turn will drive future port growth ie. self generating. Publicly align PKPC future growth to key partners in a manner that reduces uncertainty for investors e.g. Moss Vale Enterprise Zone. Lobby State Government to develop macro state strategy on the import/export system eg. Are containers going to Newcastle or Port Kembla? Progress on the Southern Highland Inland Port is reliant on being designated as State significant.</p>	<p>Financing essential infrastructure. Minimising risks and uncertainty for investors. Promotion of the inland port to industry and government.</p>	<p>Assist more formally in promotion of the Southern Highlands inland port. Assist in getting SH inland port designated as such by state government and recognised as crucial infrastructure and integral to Port Kembla growth.</p>
<p>Cost down approach to pricing to facilitate growth amongst existing and potential customers (use volume to allow cost reductions), The busier the port the pricing structure can change as cost spread over the users.</p>	<p>Absolute cost focus (reduced margins), Increased competition (International), Export sales becoming more important accompanied with tougher pricing/sales environment.</p>	<p>1 - Facilitate increase volume and lower overall cost to existing and potential customers, 2 - Maintain and promote competition within the port and port services provisions.</p>
<p>Do not build additional break bulk facilities when existing unpaid assets are under utilised, Market trade through port by eliminating extra freight expense of Sydney market through better infrastructure than congested Port Botany.</p>	<p>Getting adequate return on investment. Getting cargo movements to rail. Certainty of rail windows if this happens. Market/compete for container trade. Environmental fallout.</p>	<p>Marketing shipping lines and container lines to use Port Kembla.</p>

	Reduced cargo volumes due to GFC. High port charges in comparison to other ports. Cargo capacity at the AAT Terminal in the future.	Keep costs down. Lower port charges at the port as the full PCC trade has moved to Port Kembla. Additional port calls and cargo volume should have significantly increased PKPC revenue. Ensure there is sufficient capacity to handle growing cargo volumes in the future.
Insist on adequate infrastructure around the port to cause the least impact on the nearby residents, Continue monitoring water quality of the harbour, Increase security in the harbour so that no 'accidents' occur, Inspect safety standards on ships to make sure our coast line is protected from 'accidents' such as happened in Queensland recently, Work only with qualified wharf members, Set standards and not only guidelines.	Just staying alive.	Keep public consultation active and meaningful. Public engagement is vital. Maintain public consultation and meaningful engagement.
Continue development carefully taking account of research and marketing opportunities. Port should develop mainly break-bulk and bulk opportunities. Opportunities in distributing commodities.	Continue to provide quality service in a growing port. Develop to cover new cargoes and clients.	Continue to advise of port developments and consult with stakeholders.
Not just investment in port facilities but need to ensure adequate investment in supporting infrastructure (don't want growth in one area to strain existing resources in already established areas).	Growth of export market. Market (pricing) volatility. Potential increased competition from other performing ports in Australia.	Assist to ensure Port Kembla retains its good reputation - efficient and reliable, fast turnaround time. Assist to ensure adequate infrastructure available as the port grows and that it is available when needed - no delays or lags between demand and ability to meet this.
Develop a container terminal and an inland metro port between PK and Sydney. Joint ventures with other port companies. Broader client base - Marketing.	Maintain industry share and developing new customer bases. Road and rail congestion. Competition. Provision of quality service. Congested berths - pressure for optimum vessel turnaround times. Increase productivity.	Equity of business opportunity i.e. redefine priority berthing system. Better communication - website

Finalise port master plan, Lobby Government for largest possible share of infrastructure funding to minimise private capital required to realise port developments, Consult closely with port users to ensure port plans remain valid.	Maintaining skilled labour in business. Implementing workplace labour arrangements that allow the business to 'flex' up and/or down in response to market changes. Minimising costs. Maintaining safety focus.	Retaining port charges at current levels or decreasing same. Implement systems to prevent/minimise changes to berthing schedules. Working with government to facilitate infrastructure improvement land-side of berths.
Look to work closely with the key customers to ensure communication is effective and transparent. Support the key stakeholders and acknowledge the inputs to the port.	Rapid expansion to accommodate our business plans in meeting our export of coal requirements. Communicating the above to relevant key stakeholders - PN, PKCT, RTA, WCC etc.	Allow for further and continuing involvement in the consultation process. Acknowledge and support those customers who are most key to the injection of the port facilities. Work more closely with key stakeholders.
Maintain its current informative position in relation to the community, thereby making the community feel 'included' in what is happening in their environment. There are a lot of residents quite passionate about their port and also concerned about any implications some changes will have.	Hoping that all the plans will be without confrontation so I have less meetings to go to.	Keep in touch. Insist on the Maldon Dombarton line completion.
	1 - Infrastructure/rail, road and ports. 2 - Government leadership for the transport industry. 3 - Labour. 4 - Declining small - medium manufacturing. 5 - Perception of the transport industry.	
Provide infrastructure and facilities to ensure that cargo can be moved with minimal costs - more competitively than Sydney and other major Australian ports. Promote our port position as more attractive and desirable to Sydney Western Region and Country NSW.	Ensure compliance with Customs procedures for the import/export of cargo/persons.	
Sound infrastructure with emphasis on rail, Consider the carbon footprint, Enable the community to maintain good health by eliminating noise and air pollution, Build (finish) Maldon Dombarton rail line.	Decrease in road haulage - on to rail, Curfew on trucks (nightly) retain, Reduce carbon pollution, Consider the tourist industry, Do not work against nature.	Maintain good liaison with the community, Transparency, Responsibility towards the community, Support finishing Maldon Dombarton.

<p>Provide a stable environment where businesses are confident that they can produce positive cash flows and return on investment into the future.</p>	<p>Effects of climate change (drought). Lack of Government investment in country infrastructure i.e. rail lines in country NSW.</p>	<p>Use its influence to get NSW Government to spend money on country rail lines.</p>
<p>Greater promotion of port as 'stand alone' port with access to local industry base and expertise.</p>	<p>1 - Regulatory reform. 2 - Advocacy for recreational and commercial boating sectors. 3 - Meeting Government of the day imperatives. 4 - Meeting public expectations. 5 - Locally managing recreational/shipping interface within the port with increased ship movements.</p>	<p>Provide scope within Outer Harbour development for smaller commercial vessel repair facilities to cater to South Coast area which will create employment.</p>
<p>New opportunities - break out from traditional moulds, Look beyond Bluescope/Coal = future, common user facilities.</p>	<p>Competition. Trade uncertainties. Need for modern base. Cost/revenue pressures.</p>	<p>Pricing reviews. Tug facility development. Information sharing.</p>

Appendix B – General Feedback and Comments

The machinery of government lands itself more to the community than it does to industry.

Just an idea - Lots of complaints about tug usage. How about the port having a contract with the service provider and allocating tugs as required on a 'fixed charge' basis to the vessel. Try to make it one charge per ship.

Ships go where cargo is not the other way about! It may not be feasible to introduce a promotional fee structure over and above a fixed number of ships.

NSW Government to consider a review body along the lines of the Queensland Competition Authority to provide a review mechanism for excessive monopoly price increases by AAT. At the moment there is no recourse. If the importer refuses to pay the increased costs, AAT will refuse stevedores access to vessels.

Each industry sector should be approached to determine which options would best suit their sector.

Ideally Port Kembla could negotiate charges and logistics with P/National and provide complete port charge to a coal producer. Stay in touch with the bulk commodity producer to predict delivery or potential disruptions of production.

Supply chain activity - Consolidation of port services if it can lead to a reduction of port costs.

Feedback to PKPC from customers and community should drive their future. An essential part of the feedback mechanism is communication with various stakeholders. The forum is a useful mechanism for the transfer of information between the different parties that have an interest in the operation of the port. Perhaps for the future, there needs to be more interaction between the different groups in developing the future communications of the port community. PKPC works well with the community and needs to maintain this service level.