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Building ports with China's assistance: Perspectives from littoral countries

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ABSTRACT

China's port development projects at home and abroad has generated much discussion among the scholars and policymakers. Since 5 of the top 10 container ports in the world are in mainland China and its shipping companies carry more cargo than those of any other nation, it points to the port efficiency and maritime infrastructure that China has developed in the recent years. However, some of China's port development activities abroad have been subject of controversy pertaining to its intentions around these projects. In this backdrop, the paper seeks to analyse China's port development initiatives from littoral countries' perspective, given their critical dependence on ports such that the level of port efficiency affects the economic growth of the region. The study takes Bangladesh's port development projects as an example to indicate the opportunities and challenges involved in such initiatives and the need to continue with port development program in a win-win cooperative framework.

KEYWORDS

Port efficiency; maritime infrastructure; China's port development strategy; trade

Introduction

As China's economy expanded rapidly over the last decade, discussions about China's maritime trade became popular both among scholars and policymakers. Central to this discussion, has been China's port development projects at home and abroad. China, being the world's largest exporter and second-largest importer, controls around 20 percent of the world's container fleet and its shipping companies carry more cargo than those of any other nation. Five of the top ten container ports in the world are in mainland China, plus another in Hong Kong, which indicates that China has made substantial capital investment in its ports in the recent years.[1] This can be further understood by following the shift in emphasis on ports and maritime trade, which currently focuses on port efficiency, port demand and port value added activities.[2] This theoretical shift has its roots in the growing empirical evidence, which is the increasing reliance of every country, (small, middle and big) and every region on the ports, pointing to its prominence as a key centre of international trade and global logistic network (refer to Table 1).

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Table 1. Trade (% of GDP) in Indian Ocean Region.

Country	1960	1970	1980	1990	2000	2010	2011	2012	2013	2014	2015	2016
Singapore	339.45	271.21	411.04	344.26	366.07	373.44	379.59	370.96	365.96	362.30	329.94	318.42
Seychelles			81.39	65.85	157.38	201.88	207.16	202.21	178.32	181.29		
Maldives			358.66	168.08		142.98	180.40	160.05	161.80	164.29	147.63	155.40
Mauritius			112.12	137.11	123.33	113.46	117.54	119.50	109.97	113.29	107.64	98.38
Bhutan			51.35	57.48	77.66	113.18	111.69	101.76	102.74	93.62	94.96	82.81
Sri Lanka	62.87	54.05	87.02	68.24	88.64	46.36	54.98	51.49	49.26	50.25	49.55	50.52
Malaysia	113.42	87.12	112.99	146.89	220.41	157.94	154.94	147.84	142.72	138.31	133.55	128.64
Saudi Arabia		72.37	90.76	71.71	68.17	82.55	85.54	83.51	82.71	80.64	72.35	60.86
South Africa	54.11	45.83	60.89	41.68	51.44	55.99	60.11	60.90	64.15	64.15	61.83	60.38
Myanmar					1.17	0.18	0.20	22.38	38.58	42.26	47.36	45.48
Iran, Islamic Rep.	31.24	39.67	42.48	37.08	41.26	43.77	43.19	47.37	50.33	44.60	39.02	43.21
Australia	27.03	26.17	32.36	32.22	40.86	39.84	41.22	42.64	40.62	41.90	40.81	39.95
India	11.42	7.74	15.55	15.67	27.19	49.69	55.62	55.79	53.84	49.01	42.20	39.81
Bangladesh	19.30	20.82	23.38	18.97	29.32	37.80	47.42	48.11	46.30	44.51	42.09	37.95
Kenya	64.77	60.49	65.42	57.02	53.31	54.23	60.45	57.77	53.13	51.30	44.38	37.93
Indonesia	22.63	26.94	49.45	49.41	67.09	46.70	50.18	49.58	48.64	48.08	41.87	37.39
Egypt, Arab Rep.		32.94	73.38	52.76	39.02	47.94	45.26	40.71	40.37	36.92	34.85	30.03
Pakistan		22.44	36.59	38.91	28.13	32.87	32.94	32.81	33.33	30.90	27.65	25.14
Middle East & North Africa	56.14	77.43	61.38	66.89	82.05	85.54	87.03	86.20	84.00	80.00	77.72	
East Asia & Pacific	22.80	24.96	38.52	39.99	51.82	61.26	64.36	63.29	63.14	63.17	58.04	54.13
South Asia (IDA & IBRD)	13.40	11.25	20.35	19.74	29.23	47.44	52.98	53.00	51.44	47.25	41.32	38.91
World	24.19	26.79	38.79	38.99	51.33	56.96	60.58	60.59	60.11	59.84	57.86	56.35

Source: Derived using World Bank Database.

Globalisation has further intensified this dependence in facilitating the intermodal transportation of freight and the efficiency of the supply chain.[3]

However, the extent of services provided by the ports and the level of supply chain gains depend on port efficiency, which constitutes of port capacity and the port governance model adopted to monitor its operations. In this context, China has performed really well over the last few decades. The port industry in China has gone through several stages of reform and currently represents a unique model of port governance. It is a centralised authority at the national level operating in tandem with decentralised port corporations, which owing to their nature of mixed ownership, function like commercial entities.[4] China's port development activities, however, are no more limited to the domestic level but also focus on projects abroad. China has not only invested in the world's biggest ports. Dozens of smaller harbours such as Djibouti, Hambantota in Sri Lanka, Darwin in Australia, Maday Island in Myanmar and proposed ports on the Atlantic Ocean islands of São Tomé and Príncipe and in Walvis Bay in Namibia have also attracted Chinese investments in port construction.[5] However, some of these investments have often been subject of controversy pertaining to China's intentions around the projects. For example, China's port expansion activities in Bangladesh or Hambantota in Sri Lanka has been viewed with suspicion by its neighbouring countries.[6] It is argued that these projects not only serve economic purpose but are also meant for promoting China's geo-strategic interests.

In this backdrop, the study seeks to analyse China's port development activities from the perspective of littoral countries', given their critical dependence on ports and that the level of port efficiency affects the economic development of the region. The study examines Bangladesh, as an example, and studies the relationship between its economy and the increasing reliance on ports by analysing the growth of container volumes in the recent years, and the capacity constraints encountered by its major ports. The case of Bangladesh, in fact points to the demand and supply link in port operations, wherein a mismatch between the two highlights increases the need for port efficiency in order to comply with the trade growth and ever-changing patterns in both supply and demand chains.

Demand versus port efficiency: A study of Bangladesh's port projects

Although a small country, it is the geographical location that makes Bangladesh a key maritime trading nation in the Indian Ocean. Located in north Bay of Bengal, it comprises of two natural ports, Chittagong and Mongla. Chittagong being the principal port represents the hub of economic activity in Bangladesh facilitating around 92 percent of national maritime transportation.[7] The maximum permissible draughts of vessels range from 8.50 m to 9.20 m and the maximum permissible Length overall (LOA) of a vessel is 188 metres.[8] Currently, a total of 12 container ships can berth at a time; six at the general cargo berths which are regarded as main jetties of the port, two at the Chittagong Container Terminal and four at the New Mooring Container Terminal.[9] The port provides easy access to a cost effective maritime corridor via which foreign trade can be carried out with all the South Asian countries as well as other Asian countries. In the absence of an advanced maritime cluster like Singapore, Chittagong port consists of organisations like sea port, ship building industries, ship breaking industries, marine academy, navy &

Table 2. Trade indicators of Bangladesh.

	1971	1980	1990	2000	2010	2015	2016
Trade (% of GDP)	20.82	23.38	18.97	29.32	37.80	42.09	37.95
Trade volume (USD million)	1489	4240	5993	15,649	43,579	82,101	84,037
GDP annual growth rate	−5.48	0.82	5.62	5.29	5.57	6.55	7.11
Trade annual growth rate	−20.44	24.35	13.63	7.52	36.59	6.68	2.36

Source: Derived from World Bank (WITS).

coast guard etc.[10] A number of export processing zones as well as local industries such as cement, fertiliser, refinery, silo etc can be found within the port limits.

However, the exponential growth in container traffic in Chittagong Port is not at par with the port infrastructure and capacity (refer to Table 2). The existing port facilities are not adequate to cope with the increasing demand for container handling, which is growing at 15-22 percent per year. It is estimated that by the year 2022, Chittagong port will not be able to handle 20 million tons of cargos.[11] Adding to the capacity limitation is the time taken for loading bulk containers, which goes up to 4.45 days, as compared to the standard time of 10 hours taken by advanced seaports.[12] The port still carries out its operation with the same numbers of jetties it had 10 years ago. As a result of such limitations and inefficiencies, exporters and importers are incurring huge losses as the exporters are not being able to ship their goods on time, whereas the importers are incurring huge losses, as they are counting demurrage for container vessels overstaying at the port.[13] Thus, the capacity issues faced at the port is taking a toll on the local business as well as international trade. For example, Bangladesh failed to achieve its export target for readymade garments in the last fiscal year (2016–17) mainly due to traffic and longer lead-time at the port.[14] This has not only upset the exporters but led to a loss of face among the buyer countries. The other factor that influences the port efficiency problem is the governance structure of the Chittagong port. The port often suffers from labour strikes, which impact on the loading of cargo for shipment, leading to congestion. The Chittagong Port Management Board seems to be dissatisfied with the power sharing arrangement as they are not allowed to take important decisions on major procurement schemes of the port.[15] Thus, it clearly reflects the need for an effective public private partnership model to govern the operations of such a highly complex seaport. The model also requires public sector intervention for national planning, ensuring safety and security of the ports and private sector participation to unburden the problem of investment as well as commercial services provision.[16]

Faced with these problems of port inefficiency, the Bangladesh government had initiated three major port development projects. One of them was to expand and modernise the Chittagong port, which would allow large ships to enter the port.[17] This plan was well received by China and expressed its interest of investing in the project.[18] However, a clear road map for the project was not laid out by either of the sides. Moreover, the Bangladesh government came under international pressure after China's investment proposal, which led to the granting of permission to Indian cargo ships use Chittagong port.[19] Thus, the expansion project failed to take off, as the geopolitics overruled geo-economics. Another project where China wanted to invest in was the $8 billion deep water Sonadia island project, which was conceived to overcome the limitations of Chittagong and Mongla ports.[20] The Chinese State Owned Company, China Harbour Engineering,

which also happens to be the same enterprise building Colombo port, was chosen for this project.[21] However, Dhaka and Beijing could not reach an understanding on the port project since the financial issues could not be resolved and the project was called off by the Bangladesh government.

The idea to develop a third seaport at Payra in Patuakhali district was first conceived in 2013.[22] The Payra deep seaport was then reconfigured as a cooperative port where many different countries could invest and operate terminals. Although the Payra project initially attracted investors from around 10 countries including India, the Shipping Ministry in India expressed their reservations towards investment due to the huge costs involved in maintenance dredging of the Payra port.[23] No official announcement has been made so far and thus, the future of the Payra port project remains unclear. The only port development project which remains alive and functional is the Matarbari project. In 2015, Japan proposed to finance and build a port at Matarbari by 2023, situated about 25 km from Sonadia, where another deep water port was intended to be set up.[24] The project aims at using the port for receiving coal, which could power an entire new industrial zone in the far southeast of Bangladesh. The Japan International Cooperation Agency (JICA), the chief financier of the project has agreed to invest Tk 28,939 crore into the project.[25] However, the project is running behind schedule, and was briefly stalled due to the 2016 terrorist attack at Dhaka's Holey Artisan Bakery in which many Japanese were killed.

Thus, the study about port development in Bangladesh, indicate that both geo-economics and geopolitics influence port expansion and modernisation plans. The unsuccessful foreign initiatives to develop ports in Bangladesh reveal the lack of clarity in defining objectives of the projects, failure to build an open dialogue between all the parties and inability to forecast the benefits and hurdles involved in executing these projects. As far as China's assistance is concerned in Bangladesh's port building activity, Dhaka has failed to tap its investor options for the benefit of its own ports, and could not strike a balance between geo-strategic concerns and its domestic needs.

China's port development strategy: Rationale and key drivers

After years of economic isolation, the first experiment of China's opening up was carried out in the coastal areas.[26] The four zones located near the coastal areas were earmarked as the "Special Economic Zones (SEZs)". These zones, however, had a long history of contact with the outside world through outmigration, and also by virtue of their proximity to Hong Kong, Macao, and Taiwan.[27] These coastal cities grew into important business centres owing to their access to sea ports. The ports not only became crucial modes of transport but also attracted foreign direct investment (FDI), expanding China's exports, and accelerating the infusion of new technology. These successful experiments which characterised the reform era, are being currently initiated in the form of Free Trade Zones (FTZ) by the Chinese government. The FTZ project, beginning with the creation of the Shanghai zone in 2013, is not only expected to carry forward the "Shenzhen spirit" but also deepen the economic integration process.[28] Following the proposal, cities including Shanghai, Shenzhen and Tianjin filed applications to the State Council and its ministries for the establishment of FTZs, which would allow China to reap benefits from international businesses.[29]

Table 3. China's ports in top 10 world container ports (Million TEU).

Rank	Port	Volume 2015	Volume 2014	Volume 2013	Volume 2012	Volume 2011	
1	Shanghai, China	36.54	35.29	33.62	32.53	31.74	1
2	Singapore	30.92	33.87	32.6	31.65	29.94	
3	Shenzhen, China	24.2	24.03	23.28	22.94	22.57	2
4	Ningbo-Zhoushan, China	20.63	19.45	17.33	16.83	14.72	3
5	Hong Kong, S.A.R., China	20.07	22.23	22.35	23.12	24.38	4
6	Busan, South Korea	19.45	18.65	17.69	17.04	16.18	
7	Qingdao, China	17.47	16.62	15.52	14.5	13.02	5
8	Guangzhou Harbor, China	17.22	16.16	15.31	14.74	14.42	6
9	Jebel Ali, Dubai, United Arab Emirates	15.6	15.25	13.64	13.3	13	
10	Tianjin, China	14.11	14.05	13.01	12.3	11.59	7

Source: Derived from Journal of Commerce annual top 50 world container ports; Lloyd's List annual top 100 ports; AAPA World Port Rankings

Given China's heavy dependence on trade, both for raw materials and for securing energy supplies and to ship its exports abroad, ports have been central features in China's economy and transport network. The ports also received renewed importance in China's official policy document on One Belt and One Road, as a complementary maritime component which portends a robust Chinese presence in Southeast Asia, Europe and Africa.[30] As a result, China's maritime infrastructure has developed at a breakneck pace in the last five years. Underlining this tremendous growth, seven Chinese ports are in the list of the world's top 20 container terminals (Table 3). Mainland China-based COSCO and China Shipping are two of the world's top ten container service operators in terms of fleet size and total shipboard capacity (TEUs).[31] China has 31,300 quay berths for production use, including 2221 berths of 10,000-ton-class or above and 1173 specialised berths for coal, crude oil, metal ores and containers, and improved large-scale, professional and automated deep water ports.[32] Between 2016 and 2017, Chinese firms invested in nine overseas ports, and China's investment in port infrastructure has been picking up at a very fast rate.[33] Besides facilitating trade, ports also provide broader economic value, such as supporting the local economy besides providing valuable data on logistics.

Opportunities and challenges

China's port development projects, thus present significant opportunities to the host countries. As China is an important trading partner and investor for many countries, Chinese investment in ports can attract more investment both from China as well as other countries, due to better infrastructure and a conducive business environment for investors. For example, China Merchants Group, a Hong Kong-based conglomerate with extensive port business, has tried to replicate Shenzhen's Shekou Industrial Zone in Djibouti port projects.[34] The plan is to utilise Djibouti's geographical advantages to develop a hub for regional shipping, logistics and trade. In this way, Chinese capital investments become win-win for many littoral countries, which despite being key generators of benefit, lag in terms of infrastructure, reliability and efficiency in the handling of freight, thereby increasing supply-chain costs.[35] Also, the study of ports in Bangladesh further bolster the argument that efficient ports play a key role in facilitating trade competitiveness and thereby support sustained economic growth across the region. In other words, ports can be identified as facilitators of trade and integrators in the logistics supply chain.[36]

Despite the numerous benefits, China's port development projects face many challenges in littoral countries. This includes stringent rules pertaining to foreign investment, and therefore requires a sensitive approach on the part of Chinese investors with respect to the country's local and national laws.[37] Also any investment in ports is a risky affair given the balancing act between keeping handling costs attractive to the shipping lines yet proving profitable for the port operator and local interests. Sometimes, legal issues such as environmental policies delay or even lead to the cancellation of many investments by China's SOEs due to their perceived impact on environment.[38] This vulnerability further increases when investment opportunity becomes subject to potential political uncertainty and security dilemmas in and around the region.[39] For example, China's investments in ports in the Indian Ocean Region have prompted concerns from the international community who view the move as a part of China's larger strategic and military interests.

Conclusion

Thus, it can be argued that the rise in China's port efficiency does not make it a reliable partner for building or developing ports in littoral countries. In other words, China's port development activities face much scrutiny, which would require China to exercise restraint in its port expansion projects while taking into account the geo-political as well as geo-strategic concerns of other countries. On the other hand, since ports are key to the economy of littoral countries, competition among prospective investor countries for port development projects are sometimes beneficial as it ensures efficiency by the investors, gives greater bargaining power to the host nations and also reduces the risk of financial returns among the investors. Further, the success of complex port investment transactions rests in part on a clear understanding between the investor and host countries as both seek to benefit from trade-led development strategies.

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