



MOHAMMED BIN RASHID SCHOOL OF GOVERNMENT

POLICY ANALYSIS EXERCISE

Summary

This policy brief aims at advancing His Highness Sheikh Mohamed Bin Rashid's vision mentioned in the 50 years charter to create Dubai's own Silk Road (Rashid, 2019). This vision promotes Dubai as a pivotal hub in the global economy, as part of the Dubai plan 2021 (Council, 2015). The Dubai Silk Road Strategy, which has been approved by His Highness Sheikh Hamdan Bin Mohamed Crown of Dubai, focuses on enhancing the strategic and operational connection of logistic services between Dubai Ports World terminals across the world, with Emirates Airlines playing a crucial role (Mohammed, 2019). Since Dubai Ports are a critical component in this strategy, and Jebel Ali port is the main terminal in their network, this brief explores how Jebel Ali Port can contribute to achieving the Silk Road strategy. The brief examines the measures that Jebel Ali Port has already put in place leading to its ranking as the ninth busiest terminal in the world in terms of cargo volume as per the World Shipping Council in 2016 and most productive port in the world in 2013 as per JOC report (worldshipping, 2018). The brief also explores the best practices and innovative approaches at the port of Singapore which is ranked as the top competitive port in the world (ISCDI, 2019). Finally, a number of policy recommendations are provided targeting areas of improvement which could be implemented in Jebel Ali port to boost its competitiveness toward accomplishing the vision of Dubai Silk Road.

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Dubai Silk Road: A Strategy to Enhance Jebel Ali Port Competitiveness

Introduction

The research behind this brief has been inspired by the vision of His Highness Sheikh Mohamed Bin Rashid after the launch of the "Dubai Silk Road" initiative. This initiative focuses on enhancing and increasing the volume of trade passing through Dubai. Therefore, the main question this brief tackles is how to achieve the objective of the "Dubai Silk Road" vision?

Behind every successful megaproject in Dubai there is a story of challenge. In 1959, the Creek was the only port in Dubai and its main trade was in this area. However, the depth of the Creek was insufficient to allow bigger trade ships to sail in. The restriction presented a challenge to Dubai's trade-based economy and it was predicted that this limitation would ultimately affect Dubai's competitiveness. Dubai's Ruler, Sheikh Rashid Al Maktoum, commissioned a project to deepen the

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Creek. The project was completed successfully and allowed bigger ships to pass through Dubai, and as a result more trade opportunities followed (Zahed, 2008). Today, some sixty years later, Dubai faces new challenges with the current harsh economic environment, geopolitical issues in the region and strong competition from rival cities. The Dubai Silk Road project launched by H.H. Sheikh Mohammed Bin Rashid in January 2019 addresses these challenges, in order to retain Dubai's position in the world trade economy and to increase the trade volume passing through the city.

The focus of this brief is on Dubai Ports World since it is the main operating company managing more than 70 ports within its network (DPWorld, 2020), and more specifically on its main flagship port, Jebel Ali Port. In order for Jebel Ali Port to contribute towards achieving the vision of the Dubai Silk Road and enhance Dubai's trade it needs to be more competitive. Ports competitiveness is determined by how frequent shipping companies select certain ports compared to others which allows the market to grow and trade volume to increase (Merk, 2014). Therefore, to address the brief's main objective, the following questions are tackled:

1. How can Jebel Ali Port be more competitive to raise the volume of the trade?
2. What are the factors that can make Jebel Ali Port more competitive?

A better understanding of the main competitiveness drivers of ports is needed here. Competitiveness drivers included in previous research and International Shipping Centre Development Index (ISCDI) were identified. Because Singapore's port (PSA) has been ranked as the most competitive globally for the last six consecutive years (ISCDI, 2019), benchmarking was carried out between Dubai's Jebel Ali Port

and PSA. Identification of the drivers attributed to PSA's success can aid Jebel Ali Port narrow down areas of improvement, stimulating the volume of trade passing through the city which will in turn contribute towards the success of the "Dubai Silk Road" vision.

Research Methodology:

The research methodology is based on a case study of Singapore Port Authority (PSA). A case study design was deemed more appropriate for this study, since it is based on a qualitative approach in which the investigator explored a real life case over time involving in-depth data collection from reports, multiple sources of information, a case theme and a case description (Alpi & Evans, 2019).

Singapore is usually benchmarked with Dubai due to the many similarities shared between them, such as lack of natural resources and small geographical size. Moreover, Singapore port has occupied the top of competitiveness list for six years in row (ISCDI, 2019) and has been ranked as the second busiest port in the world for many years (Lloyds, 2019). In terms of an international port competitiveness index, the most relevant is the International Shipping Center Development Index (ISCDI) which is prepared by the Baltic Exchange and Xinhua news agency based in London (Today, 2019).

Drivers of Port Competitiveness (Previous researches)	Similar Competitiveness Drivers in ISCDI	ISCDI index sub indicators
Economies of scale in shipping	Port factors (Container Throughput, Number of Cranes & Port Draught)	Port factors: Container throughput, Dry bulk cargo, Liquid bulk cargo, Number of Cranes, Total Length of Container Berth and Port Draught
Governance changes	Shipping Services (Maritime legal services)	Shipping services: Shipping Brokerage Services, Ship Engineering Services, Shipping business service, Maritime legal service, Shipping Finance Service and Ship repair service
Coopetition among ports in proximity	-	General Environment: Government Transparency, Extent of e-government and administration, Economic Freedom, Custom Tariff, Ease of doing business index and logistics performance index
Inter-firm networks	-	-
Green & Sustainability challenges	-	-

Table 1: Comparing Port Competitiveness Drivers in Previous Research and ISCDI Index

Comparing drivers of port competitiveness identified from literature review with the ISCDI index competitiveness indicators in Table 1 revealed the following similarities:

Economies of scale in shipping is mainly attributed to the capacity of ports handling huge (mega) ships. The first driver of competitiveness is found in ISCDI index involving port factors with sub-indicators like number of cranes, total length of container berths and port draught, factors representing the capacity of a port. The second driver mentioned in the literature is governance changes which is mainly about the reform in port governance to make ports more competitive. In comparison, similarities exist in terms of the competitiveness indicator in the ISCDI index for maritime legal services tackling the legal issues related to ship or property losses. Both port governance and maritime legal services concentrate on the ports' legislative infrastructure.

As shown in Table 2 below, Singapore has topped the ranking in the International Shipping Index for six consecutive years (2014-2019)

Ranking	2019	2018	2017	2016	2015	2014
1	Singapore	Singapore	Singapore	Singapore	Singapore	Singapore
2	Hong Kong	Hong Kong	London	London	London	London
3	London	London	Hong Kong	Hong Kong	Hong Kong	Hong Kong
4	Shanghai	Shanghai	Hamburg	Hamburg	Rotterdam	Rotterdam
5	Dubai	Dubai	Shanghai	Rotterdam	Hamburg	Hamburg
6	Rotterdam	Rotterdam	Dubai	Shanghai	Shanghai	Dubai
7	Hamburg	Hamburg	New York-New Jersey	New York-New Jersey	Dubai	Shanghai
8	New York-New Jersey	New York-New Jersey	Rotterdam	Dubai	New York-New Jersey	Tokyo
9	Houston	Tokyo	Tokyo	Tokyo	Busan	New York-New Jersey
10	Athens	Busan	Athens	Athens	Athens	Busan

Table 2: Top Ten Port Cities in ISCDI Index, Source: (ISCDI, 2019)

Analysis

Comparing Dubai's Jebel Ali port with Singapore PSA port in terms of capacity we can see the following differences:

Port	Capacity	Container Throughput	Number of Quay Cranes	Port Draught
Jebel Ali	19.3 million TEU (DPWorld, 2020)	14.95 million TEU (worldshipping, 2018)	102 (DPWorld, 2020)	17 meters (DPWorld, 2020)
PSA	43 million TEU (Globalpsa, 2020)	36.6 million TEU (worldshipping, 2018)	195 (Globalpsa, 2020)	18 meters (Globalpsa, 2020)

Table 3: Benchmarking between Jebel Ali and PSA Ports in terms of Capacity

In Table 3, comparisons are made between Jebel Ali and PSA ports in terms of capacity. A port that can handle more cargo is more preferred by users and leads to more imports, exports and transshipments (YEO & SONG, 2003).

Port Capacity

Port capacity means the maximum traffic a port terminal can handle in a given scenario (Ana, 2012). Comparing the two terminals shows that Singapore PSA port has almost double the capacity of Jebel Ali port with PSA port able to handle 43 million TEU (Twenty foot Equivalent Unit of cargo), while Jebel Ali port able to handle 19.3 million TEU per year.

Container Throughput

Port throughput refer to the actual number of containers of cargo (TEU) that the port handles over a specific period (BTS, 2016). Table 3 indicates that PSA port's throughput doubled that of Jebel Ali port in 2018, where PSA port handled 36.6 million TEU while Jebel Ali port handled 14.95 million TEU.

Quay Cranes

Quay cranes are used for loading and unloading cargo from ships to the port, while yard cranes are used in the port yard to handle materials heading for storage (Techniques, 2009). Quay cranes are one of the most crucial elements contributing to port capacity, since ports with a higher number of quay cranes can handle more cargo. Comparing PSA port with Jebel Ali port in Table 3 shows that PSA port is equipped with 195 quay cranes, while Jebel Ali port has just 102 quay cranes.

Port draught

The draught or draft of a ship is the vertical distance between the lowest point of a ship and the water surface (Figure 1). The draft determines the minimum depth of water the ship can safely navigate. Before approaching any port terminal it is important for each ship not to exceed the draft limit of the port (Xing, Kjetil, & Jorgen, 2017). Ports with greater depths or drafts are at an advantage since they can handle larger ships. Comparing PSA port and Jebel port in Table 3 shows both ports have almost the same draft, with PSA port draught at 18 meters and Jebel Ali port draught at 17 meters.

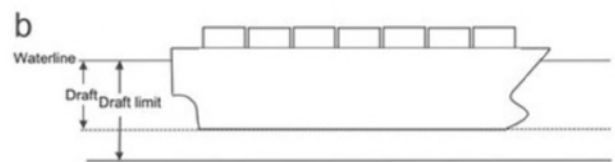


Figure 1: Ship Draft and Draft Limit, Source: (Xing, Kjetil, & Jorgen, 2017)

From the above comparison of Jebel Ali and PSA in terms of port capacity the main gaps that need attention from Jebel Ali port authority are in relation to increasing the maximum capacity of the port.

Maritime Legal Services

Any legal issues related to property or ship losses or share losses between parties along waterways and at sea are handled by the maritime legal services. One of the main roles of maritime legal services are in international maritime arbitration and describes the country's soft power in maritime trade (ISCDI, 2019).

A comparison of Dubai and Singapore in terms of the number of maritime arbitrations held per year is set out in Table 2 below:

City	No. of Maritime Arbitrations
Dubai	Less than 20 (Dean, Neame, Eddings, Colaco, & Shorrocks, 2019)
Singapore	More than 120 (Dean, Neame, Eddings, Colaco, & Shorrocks, 2019)

Table 2: Number of Maritime Arbitrations held in Dubai and Singapore in 2016

Table 2 shows Singapore as the preferred location of the shipping companies and stakeholders for dispute resolution with more than 120 maritime arbitrations held there and less than 20 arbitrations held in Dubai in the year 2016 (Dean, Neame, Eddings, Colaco, & Shorrocks, 2019).

Singapore Maritime Arbitration Centre

The Singapore Chamber of Maritime Arbitration (SCMA) was founded in May 2009 and prior to this, from 2004, dispute resolution was managed by Singapore International Arbitration Centre (SIAC) (SCMA, scma.org.sg, 2020).

Dubai Maritime Arbitration system

In 2016, Dubai further enhanced its commitment to the industry by establishing a dedicated arbitration center for maritime dispute resolution, the Emirates Maritime Arbitration Centre (EMAC) (Khader, 2018).

Arbitration Centre	Administration and Management fee	Arbitrator's fee
EMAC	1000 to 60,000 AED depends on claim value (Khader, 2018)	Hourly based (Khader, 2018)
SCMA	No administration & Management fee (SCMA, scma.org, 2020)	Parties are free to negotiate on Arbitrator's fee (SCMA, scma.org.sg, 2020)

Table 3: Comparing EMAC & SCMA in terms of Administration, Management & Arbitrator's fees

Comparing both arbitration centers shows that Dubai's marine arbitration center, EMAC, charges for administration and management services. This means the higher claim value is, the higher charges will be. Also, the arbitration fee based on an hourly rate means that the longer case take, the higher charges will be. Singapore's marine arbitration center SCMA is an attractive alternative, since it does not charge any filing, administration and management services fees, and it is flexible where the parties involved have control of the arbitrator's fee.

Moreover, Singapore's arbitration center SCMA has designed a "Light Touch" framework which means minimum institution intervention allowing parties to have more flexibility. For instance, with SCMA it is not compulsory to state details such as relief or remedy sought or the nature and circumstances of the dispute at the initial stage of filing a case. Parties use this provision to attempt early settlement without incurring additional unnecessary costs (Lee S. , 2019). In contrast, Dubai's arbitration center EMAC requires submission of a brief description of the nature of dispute and identification of the payment of the registration fee to the center, to commence the arbitration process case information such as relief or remedy sought (Arbitration, 2016).

Thus, the main disadvantages in Dubai's current marine arbitration system appear to be associated with cost and the current rules.

Policy Recommendations

1. Investing in Infrastructure: Regarding the first port competitiveness driver discussed above, increasing port capacity requires governments to investing billions of dollars. In the example of Singapore, in 2018, the Monetary Authority of Singapore and Enterprise Singapore launched Infrastructure Asia (IA). The aim of IA was to increase the number of infrastructure projects that are investible and bankable. Also it serves as a connection between the public sector, different industry players and multilateral development banks. Through IA, Singapore has managed to get 45 projects approved in the same year, and it is expected to unlock \$ 39.8 billion investment from which \$ 24 billion is expected to come from private investors (Lai, 2018). We can see that Singapore has managed most of its funds from

the private sector through collaboration with multilateral banks, private sector investors and the public sector.

Dubai can follow similar steps, since it is one of the most attractive cities in the MENA region for foreign direct investment FDI that reached \$10.5 billion in 2018 (Suehrer & Mohalal, 2019). Therefore, Dubai government should create a digital investing platform for investment in developing infrastructures that includes banks, private sector investors and foreign investors who can provide required funding for important projects such as expansion of Jebel Ali Port. This platform will allow the foreign investors from all over the world to get an idea of the infrastructure investment opportunities available in Dubai and what is the return on investment would be. Also this virtual platform can provide investors with important information such as growth rate of different economic sectors in the city.

2. Increasing Ports' Connectivity: In order for Jebel Ali port to have more container throughput which means more cargo to pass through the port, looking at Singapore PSA port case we can see that around 85% of the cargo that passes through the port are considered transshipment that means most of the cargo is coming to Singapore as an intermediate (transit) destination and then it goes to its final destination.

Singapore PSA port has become the transshipment hub through its excellent connectivity with large number of ports around the world, wide choice of carriers that provides cost saving and competitive freight rate, main shipping lines are passing through PSA port and high frequency of ship visits that gives more flexibility for shippers to schedule their cargo (Lee & Cullinane, 2016). Jebel Ali Port can increase its

transshipment cargo also to raise its container throughput. Since DP world is already operating around 78 ports over 50 countries across six continents (DPWorld, 2020), it is recommended to provide attractive incentives for shippers, shipping companies, industries and businesses in those 50 countries to use Jebel Ali port as a transshipment port for their cargo which will allow Jebel Ali port to enhance its competitiveness and increase the volume of trade passes through the city.

3. Flexible Legal Services: Regarding the second port competitiveness driver, port governance, represented by marine legal services and dispute resolution, Singapore Maritime Arbitration Centre SCMA has competitiveness advantage over other centers because it does not charge fees for filing, administration and management services. Also SCMA is flexible with parties concerning Arbitrator's fee decisions. Similarly, SCMA is flexible with parties in terms of minimum institutional intervention, meaning that it does not ask parties to state details like relief or remedy sought and the nature and circumstances of the dispute at the early stages of filing the case.

Dubai's Arbitration Centre EMAC is urged to revise its charges and reduce it. In addition, it is crucial to revise rules and make them more flexible with parties to enhance its competitiveness. Some of the most of important factors parties consider when deciding on arbitration centers are where the asset lies, area of trade, proximity and location of parties (Khader, 2018). Therefore, Dubai can utilize its critical location in the Middle East, where around one third of World oil's production is (Rapier, 2020), as well as its excellent relations

with important players in the region including GCC countries. This means that the Middle East has high traffic of oil and gas ships moving in and out the region which increases the chances for dispute resolution cases. As a recommendation, a new policy for Dubai's maritime arbitration center EMAC should utilize this opportunity aiming at making Dubai a preferred dispute resolution and mediation center. This can be achieved by creating specific division for oil and gas maritime arbitration services with technical experts, minimal charges and rules that suits the needs of different parties.

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The Mohammed Bin Rashid School of Government (MBRSG) is a research and teaching institution focusing on public policy in the Arab World. Established in 2005 under the patronage of HH Sheikh Mohammed Bin Rashid Al Maktoum, Vice President and Prime Minister of the United Arab Emirates and Ruler of Dubai, in cooperation with the Harvard Kennedy School, MBRSG aims to promote good governance through enhancing the region's capacity for effective public policy.

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