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The mv ANASTASIA loaded with rock for the breakwater construction at Sochi Port, Russian Federation, being prepared for discharging the rock by means of an on-board excavator with long reach. Photo : Dirk van Uitert (c)

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The **CHRISTIAN BRUNNINGS** in Amsterdam – Photo : Willem Koper (c)

Second edition of Ship Efficiency: The guide officially released

Fathom, the information specialists on maritime eco-efficiency, has now officially released the fully revised, updated and extended second edition of key industry reference source, Ship Efficiency: The Guide, in response to the ever evolving technology and efficiency solutions on the market. In an economic climate in which owners and operators face increasing pressure to reduce fuel costs, Ship Efficiency: The Guide is a source of vital commercial knowledge. It is the only industry publication series that critically examines the viability of fuel saving technologies and analyses providers' claims. Supported by the world's largest shipowners association, BIMCO, and classification society ABS, Ship

Efficiency: The Guide 2nd Edition now provides even greater in-depth analysis of fuel saving, efficiency technologies and measures for those thirsty for comprehensive coverage of the eco-efficiency sector.



With an extra 100 pages of content and in-depth critique of over 220 products across over 60 technology categories from more than 100 providers, the new 2nd edition of the Guide has been wholly revised since the 2011 flagship edition. The new edition also includes new chapters, including 'Energy Management Software Solutions' plus additional content, case studies and expanded critique of the eco-efficiency technologies.

Alison Jarabo, managing director Fathom commented: "With the finished Guide in our hands, we are starkly aware of the Guide's growth in depth and volume; and thus just how much the industry has grown in the past two years since we wrote the first edition." The maritime clean technology market has developed at such a formidable rate that we have had to go back to the drawing board for each technology sector and application. Fathom is about enabling vessels and operators to work smarter, not harder. Ship Efficiency: The Guide has become an important industry reference tool and our 2013 edition fulfils the need for valuable analysis of this changing and dynamic sector." The Guide also consolidates expert contributions from across the industry; BIMCO, Andreas Chrysostomou, and Howard Fireman of ABS all share key insights and advisory information to and from across the industry. Howard Fireman, Vice President, Operational and Environmental Performance, ABS, said: "At ABS, we are dedicated to assisting the maritime and offshore industries in tackling the challenges of energy efficiency and compliance with environmental regulation. This forms an increasingly important part of our

core mission to promote the security of life and property and preserve the natural environment. The increased use of technology, both hardware and software, plays an important part in this process. Ship Efficiency: The Guide sits alongside ABS' own guides and advisories on these topics – in particular, ABS' new Energy Efficiency Advisory – as an important reference source, from which the industry can draw as it seeks to understand the issues and formulate strategies for compliance and more efficient operations." Jeppe Skovbakke Juhl, Senior Marine Technical Officer, BIMCO commented: "It's a challenging but exciting time to be in the shipping industry, as is evident by how different the 2013 Guide is to the 2011 edition. Fuel efficiency solutions are increasingly innovative and the providers and technologies available to the market have increased significantly in number. As the industry has grown and developed, so has the need for a fully expanded and revised edition of Ship Efficiency: The Guide to provide an accurate and up-to-date version of this vital reference tool for the industry. Supported and assisted by BIMCO, Fathom has produced a distinctive and important publication for owners, operators and managers seeking to reduce emissions as well as fuels costs" **Source: Fathom Shipping**



The **BUILDER SUCCESS** (1979 - Japan) passing Changi Airport Singapore.

Photo : Mick Edses C/E Seven Seas (c)



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The THSD **GEOPOTES 15** inbound for Rotterdam **Photo : Paul Gerdes (c)**

New clause tackles hull fouling dilemma

Under most standard forms of time charter party an owner is obliged to maintain his vessel throughout the charter period. Such maintenance includes keeping the vessel's hull and other underwater parts free of fouling. If the owners fail to maintain the vessel and, as a result, the vessel's performance is affected, the owners may be exposed to claims by the charterers for underperformance. With modern efficient hull coatings and relatively swift turnarounds in port, fouling should not be a major issue.

However, the owner's maintenance obligation is based on the "normal" operation of the vessel which includes port stays of a reasonable determinable duration. If the charterers order the vessel to a port or place where it sits for a period in excess of what might be considered a "normal" duration and this results in hull fouling, should the owners still have to continue to warrant the performance of the vessel?

Rider clauses dealing with hull fouling have been in widespread use in a number of trades for many years. They are generally fairly simplistic, stating only that if the vessel lies idle for more than an agreed number of days then the owners can suspend the performance warranty until the hull has been cleaned. Sometimes the costs for cleaning are passed to the charterers, but not always. As a result there is an inconsistent approach in the industry to dealing with hull fouling following prolonged stays in port on charterers' orders. As the length of port stays has increased in recent years, this has often become a source of dispute between owners and charterers.

BIMCO has tackled this issue with a new Hull Fouling Clause which comprehensively sets out the physical circumstances and the point in time when the responsibility for hull fouling passes from the owners to the charterers. The clause distinguishes between idling in Tropical Zone waters, where the rate of growth is generally highest, and idling outside this zone. The parties are free to agree the number of days idling to apply in each area before the clause takes effect. If they cannot agree then 15 days applies by default.

Once the agreed number of days has lapsed, the vessel's performance warranties are suspended until such time as the hull can be inspected and, if necessary, cleaned. It may well be that inspection and cleaning is not possible or permitted at the vessel's current port of call - and the clause deals with this situation. If the hull is fouled then it is to

be cleaned by the charterers at their cost and in their time - but in accordance with the paint manufacturers' recommendations and under the supervision of the Master.



Kotug's **SD SEAL** in drydock – Photo : Peter Andriessen (c)

This recognises that hull coatings are very expensive, easily damaged and become less effective the more often they are cleaned. Finally, if it is not possible to clean the hull before the vessel is redelivered, then the clause provides for the owners to be compensated for the costs they will incur when eventually cleaning the hull. The BIMCO Hull Fouling Clause has been drafted by a team of owners and charterers to ensure that the provision is appropriately balanced. Valuable technical input was provided by a representative from a major paint manufacturer. The Clause was adopted by the Documentary Committee at its meeting held on 27 May in Paris. Source: BIMCO



31-03-2013 : Tanker **ADFINES STAR** inbound to Vancouver harbor – Photo : Robert Etchell ©



The **COSCO KOBÉ** seen in port of Boston June 1st 2013. Photo : **Ronald de Bloeme** (c)

Shipping Costs Little Changed as China Ore Demand Seen Slowing

Rates to ship iron ore and other commodities were little changed amid speculation falling steel prices in China will curb vessel demand. The Baltic Dry Index slid 0.3 percent to 809 points, its 16th straight decline, according to the Baltic Exchange, a London-based publisher of freight rates. The biggest change was in rates for Panamaxs hauling about 75,000 metric tons, which dropped 1.3 percent to \$6,329 a day, figures showed today. Steel reinforcement-bar futures in Shanghai have fallen for four straight months to the lowest since September on the Shanghai Futures Exchange. The slumping prices may limit demand for iron ore, from which the alloy is made, Omar Nokta, a New York-based analyst at Global Hunter Securities LLC, said by e-mail. Daily earnings for ore-carrying Capesizes carrying about twice as much cargo as Panamaxs fell less than 0.1 percent to \$5,171, according to the exchange. Supramax rates rose 0.7 percent to \$9,104 a day, and Handysizes, the smallest ship type tracked by the index, fell 0.6 percent to \$7,906, data show. Source: **Bloomberg**



The **C-Odyssey** outbound at the Oude Maas - Photo : **Frans Sanderse** ©

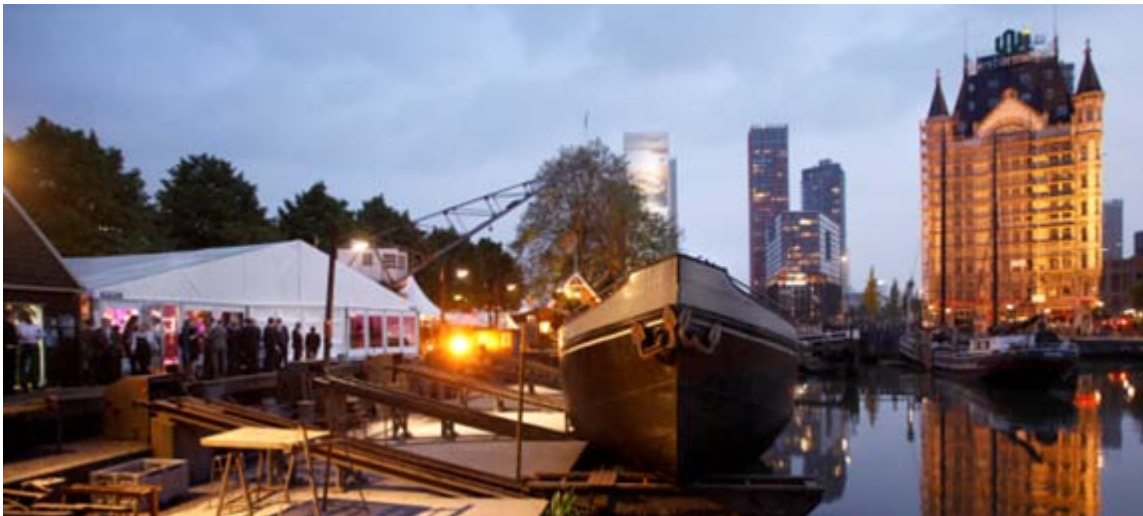


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25 years Dutch P&I! – fireworks from Het Witte Huis



The independent protection and indemnity broker and correspondent **Dutch PI** celebrated their 25 anniversary last Thursday. The usual low-profile company invited over 300 shipowners, traders, insurers, brokers and other representatives from the Rotterdam maritime community. The reception and party was held in the beautiful setting of the



historic “Oude Haven”. Part of the celebration was the display of fireworks that took place from roof of Het Witte Huis. This 1898 built icon office building was the tallest in



Europe of it's time and according to local authorities it was the first time ever that a fireworks display was allowed. Dutch P&I started in 1988 and in 1990, the Rotterdam-based company took over Royal Van Ommeren's P&I department, expanding from just a few employees to around 50 and into a significant participant in the world wide P&I market. Next to the office in Rotterdam it nowadays has offices in Copenhagen, Antwerp and Amsterdam.



31-03-2013: bulker **SEA AMITY** outbound in Vancouver harbour Photo : Robert Etchell ©



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Four Aboitiz barges on standby for brownouts

In a move to avert possible brownouts in Metro Manila, Aboitiz Power Corp.'s subsidiary Therma Mobile Inc. recently inaugurated its four Navotas power barges. The four barges have a combined capacity of 242 megawatts (mw) and switchyard. This signifies that the facilities have completed their rehabilitation and are now ready to supply power in any part of Metro Manila once brownout persists.

Therma Mobile Inc. acquired four units of the barge-mounted floating power plants moored at the Fish Port Complex in Navotas City on May 27, 2011. At the time, the units were not operating for five years. Once fully operational, the barges will have an aggregate deliverable generating capacity of 242 mw. The Navotas barges are bunker C-fired diesel plants designed for peak load application. "You know how people like to restore old cars and bring them back to life. Well we did 60, some of them all at once. What a feat. I came several times as the rehabilitation and renewal work were progressing and was literally amazed at how it was possible to get each and every component to work

again as one unit," said Aboitiz Power executive vice president and power generation group chief operating officer Antonio Moraza. Moraza added the completion of the rehabilitation of the power barges signaled the "rebirth" of the power facilities. During the inauguration ceremony, Navotas assistant port manager Custodio Balaoing said "the operation of the barges at Navotas is envisioned to provide sufficient and quality power supply at the Camanava (Caloocan-Malabon-Navotas-Valenzuela) areas and more specifically at the Navotas Fish Port Complex where various fisheries related establishments and their support industries like ice plants and cold storage, fish processing facilities or canneries and shipbuilding or ship repair facilities are located. As I see the Aboitiz Power tagline, we believe that with their barges now here there is indeed a much better future for the fishing industry and all the industries that have allied with the company." **The Daily Tribune**



The **APL TOURMALINE** in the Port of Sohar (Oman) equipped with anti-piracy curtains
Photo : Rik van Marle (c)

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Scheepvaart wijkt voor wegverkeer

Het vertrouwde beeld van de **Betelgeuze**, het korpsschip van het **Zeekadetkorps Rotterdam**, aan de Waalhaven Oostzijde is niet meer...



De bemanningsleden van de **Betelgeuze** maakten dinsdag 28 mei 2013 samen het schip vaargereed voor een definitief vertrek uit de Rotterdamse Waalhaven. Vanaf 1959 is het Rotterdamse korps van het Zeekadetkorps Nederland een vertrouwd gezicht in de Waalhaven. Voorheen de Hydrograaf, de bekende Pakjesboot 12 van Sinterklaas, en aansluitend de **Abraham Crijnsen**, een beroemd schip van de Koninklijke Marine. Deze twee historische schepen hebben beide vele jaren dienst gedaan als onderkomen van de zeekadetten. In 1995 kreeg het Rotterdamse Zeekadetkorps de beschikking over de **Betelgeuze**. Dit voormalig loodsvaartuig kreeg, dankzij de medewerking van het Havenbedrijf Rotterdam, een prominente ligplaats aan de Waalhaven Oostzijde. Vanwege de

geplande dubbele rijbaan van de weg Waalhaven Oostzijde is er geen plaats meer voor de zeekadetten en het walverblijf met leslokalen. De nieuwe koers is uitgezet naar de Dokhaven nabij Heijplaat. Een historische locatie waarbij verleden en toekomst samen komen. **Source : Wouter Eijkelenboom**



The **HOEGH TRIDENT** enroute Amsterdam – **Photo : Simon Wolf ©**

Flanders Water Heritage Cooperates With Polish Government

Following the sinking of the last Belgian Congo Liner **Charlesville** (currently **Georg Büchner**) on Thursday evening, 30 May, Flanders Water Heritage ('Watererfgoed Vlaanderen') immediately activated its wide international maritime network. We talked personally to the Polish Vice Minister of Transport, the Director of the Polish Maritime Administration, Managers of the Port Authority of Gdansk and a major private port operator and the Belgian Honorary Consul in Gdynia. We offered our full cooperation to investigate the causes of the foundering of this iconic ship. As a matter of fact, we possess important information on the preparation of the departure from Rostock, which suggests that the vessel – which was still a listed monument under German law – left port in a completely unseaworthy state. The Polish authorities accepted our offer with thanks.

We also made a request to take all appropriate measures to prevent further damage and the looting of the wreck pending an investigation into the feasibility of salvaging the ship or components thereof. The Polish authorities promised to enact a prohibition to dive and to study a salvage project in cooperation with us. Heritage Values Must Be Preserved Upon Removal Of Wreck Meanwhile we also investigated the maritime law of Poland. In principle, the owner is obliged to remove the wreck himself. As the wreck constitutes an obstacle to navigation and hinders coastal traffic, the Maritime Office of Poland may undertake its recovery, notifying the rightful owner about the time of the delivery, provided that the latter shall refund the costs of the works. If the owner fails to collect the recovered property, or does not pay the costs of the works, the Maritime Office may decide to sell the property. The UN Convention on the Law of the Sea obliges all States to protect objects of an historical nature found at sea and to cooperate for this purpose (Art.

303). We informed the Polish Authorities that, upon departure, the ship was still a listed monument under German Heritage Laws and that Flemish Minister Bourgeois announced that, upon its repatriation, the ship will be protected under Flemish Heritage Law. As Belgium and Poland are States Parties to the UN Law of the Sea Convention, the competent Governments are under a duty to cooperate in order to ensure the conservation of the wreck.

Talks With International Salvage Companies Flanders Water Heritage has entered into negotiations with the most reputed salvage companies. We submitted technical data in order to obtain a price

Secured Wreck of Belgian Congo Liner **Charlesville** Heads for New World Wreck Museum in Antwerp quotation. Experts confirmed that it should be possible to raise the wreck in its entirety. It goes without saying that such a project would require substantial financial means. The possibility to save parts or components will be investigated as well.

New World Wreck Museum Set To Become An International Hit Never waste a good crisis ! Following the sinking of the Charlesville the ship is no more under the control of the untrustworthy German authorities and her story has become even more intriguing. We propose to integrate the ship or at least components into a brand new World Wreck Museum in Antwerp, together with the wrecks of the the Cog of Doel and the Belgica. The Cog of Doel, built in 1325, is the most important wreck of a medieval European cargo ship. It is currently the subject of a scientific project financed by the Government of the Region of Flanders in Belgium.

The Belgica, built in 1884, is the wreck of the ship that made the first scientific expedition to the Antarctic and which became the first ship to winter there. The wreck lies in a Norwegian fjord and a salvage project is ready to be implemented. The Charlesville, built in 1950, is the only wreck of a cargo and passenger ship which connected Europe and an African colony. Antwerp has the largest sea port area on the planet and has a centuries-old tradition as a port city.

The World Wreck Museum would give Belgium a world-class maritime attraction, similar to the Vasa Museum in Stockholm and Titanic Belfast which opened in 2012. The Vasa Museum attracts 1.2 million visitors per year, makes a substantial profit and in addition generates 200 million EUR per year for the local economy of Stockholm. You can read the case for the World Wreck Museum on http://www.watererfgoed.be/www_Wereldwrakkenmuseum.aspx . We are currently preparing English, German and French versions of this web page. We have informed all Polish, Belgian, Flemish and Antwerp authorities of the above and have requested a technical meeting before positions are made public. We also invited the Underwater Archeology Department of the excellent Maritime Museum in Gdansk to assist us. See also our press release of last Friday on <http://www.watererfgoed.be/Docs/Watererfgoed%20Charlesville%20perstekst%2031%205%2013.pdf> (in Dutch).



New shipping lanes to protect whales

An effort to avoid large ships striking and killing endangered whales has led to new traffic lanes off the California coast. The changes that start this week affect ship traffic in and out of San Francisco Bay, the Santa Barbara Channel and the ports of Los Angeles and Long Beach.

Migrating blue, fin and humpback whales are prone to strikes since they are lured to the California coast in years where there is plentiful krill to feed on.

All three species are endangered. Blue whales, the largest animals on earth, can grow up to 27 metres long but are tiny compared to large cargo ships. There are believed to be about 2,000 blues in the northeast Pacific, about 2,000 fin whales and about 2,500 humpbacks.

An increase in fatal whale strikes led federal maritime officials to work with the shipping industry and environmentalists to find ways to reduce the deaths.

John Calambokidis, a Washington state-based scientist who has studied ship strikes off the US West Coast for decades and participated in the effort, said the lanes are a good first step but not a full solution. "This will be a significant

improvement but it will only result in a modest reduction in ship strikes, and there are a number of additional steps we need to take to make more progress on this," Calambokidis said. The Pacific Merchant Shipping Association, which worked on the changes, applauded the efforts. "We are in full agreement with the shipping changes as they will help assure the protection of both human and marine life and the continued safe and efficient flow of commerce in and out of California ports," TL Garrett, the association's vice president, said. **Source : -AP /NZ Herald**

Shell contractor's role in checking tow setup under scrutiny

Near the end, after a number of broken tow connections and tow ship engine failures, after a mistakenly dropped anchor and scary rescues of crew, after five days in an escalating Gulf of Alaska storm, two boats finally had Shell's unwieldy oil drilling rig, the **Kulluk**, under tow.

Jon Skoglund, skipper of the Kulluk's Louisiana-built tow ship, the **Aiviq**, testified Thursday before a Coast Guard investigation panel about that fleeting control as well as problems with his vessel's fuel, concerns about the voyage route, and other factors that may have contributed to the drilling rig's Dec. 31 nighttime grounding south of Kodiak Island.

The **Aiviq**, whose crew resurrected all four failed engines at sea, and the Alert, a Crowley Marine Services tugboat sent to help, earlier that day drew up close to the drifting, unmanned **Kulluk**. They connected to broken tow lines in extreme conditions and at last were making way, Skoglund said. So what changed? asked Cmdr. Joshua McTaggart, the Coast Guard's lead investigator of the grounding.

"I'd have to go back and check my accuracy with the log, but I believe we were instructed to change course and that made a considerable difference in our headway," Skoglund answered.

By then, a unified command team that included the Coast Guard, Royal Dutch Shell, and **Aiviq** owner Edison Chouest Offshore was giving orders from an emergency command center set up in the Anchorage Marriott Downtown. The boats and drilling rig had been headed to the closest safe refuge from the storm, but were instructed to go to "the vicinity of Kodiak" instead, Skoglund said. The Kulluk began pulling them back. The Aiviq's tow line broke, then, as Alert was being pulled to shore, Coast Guard Capt. Paul Mehler ordered it to cut its line. The abandoned Kulluk hit the rocks.

A hearing that is part of the broader formal marine casualty investigation wrapped up Thursday afternoon after nine days of sworn testimony by more than a dozen witnesses, including Shell managers, assorted boat captains, a high-ranking Coast Guard officer and various other players in the complicated machinery running the **Kulluk** tow operation. Investigators canceled Friday's testimony, which was going to feature a towing expert. Shell's contractor in charge of the failed December tow, John Becker of Offshore Rig Movers International, was on the witness list but didn't testify because of a family emergency.

McTaggart's report on the investigation is due July 5 to Rear Adm. Thomas Ostebo, commander of the Coast Guard in Alaska. It must be approved by the Coast Guard commandant in Washington, D.C., before being released to the public, McTaggart said in wrapping up the hearing. He could recommend changes in safety procedures or equipment to prevent similar problems or propose further action against individuals licensed by the Coast Guard. But he won't assign punishment, he said.

The **Aiviq** was custom built for Shell to tow the **Kulluk** alone and succeeded in moving it from Seattle north through a Chukchi Sea storm to the Beaufort Sea drilling site then south to Dutch Harbor. When Skoglund took over command of the Aiviq in mid-December, he reviewed Shell's plan to tow it from Dutch Harbor to the Seattle area for major off-season maintenance. He raised concerns about the near shore route and said he pushed for a more direct, southerly course in deeper water, the Great Circle route. That route would have allowed a tow line up to two-thirds of a mile long, Skoglund said. A long line sinks deep into the sea, and the weight of the line helps absorb the force of rough weather. Plus, being further off shore gives a ship "sea room," a distance that can prevent a grounding, he testified.

Becker agreed with him, Skoglund said, but they were overridden by Noble Drilling Corp.'s need to be near enough to shore for evacuation of hurt or ill crew members riding on the **Kulluk**. On Dec. 22, the day after the **Kulluk** and the Aiviq left Dutch Harbor, Skoglund said he again pushed for a southern route but didn't get permission to change course until Dec. 25 as he saw rough weather coming up on them. Coast Guard investigator Keith Fawcett asked Skoglund about the ship's fuel. The Aiviq loaded up with 440,000 gallons of diesel at the Delta Western fuel dock in Dutch Harbor, Skoglund said. A biocide agent often is added to fuel to prevent algae and filter-clogging slime, Fawcett said. The Aiviq's chief engineer testified earlier that slime damaged dozens of fuel injectors and caused the engine

shutdowns but he didn't know what caused the slime. "Do you know if biocide was introduced into the fuel of the **Aiviq** at any point?" Fawcett asked. "To my knowledge, we had never treated those fuel tanks with biocide," Skoglund answered. The Aiviq's fuel is still undergoing testing, according to the Coast Guard. Despite the troubles, the **Aiviq** was, and still is, capable of towing the Kulluk alone, Skoglund said. That arrangement eliminates the risk of two tow vessels crashing into each other or the rig, he said. The tow setup included a 90-foot length of heavy surge chain, and the tow line was 31/2 inch-thick wire, which also is heavy. That gear serves as an underwater spring in rough water, he said.

Also on Thursday, the first hint of blame arose in the hearing. Shell's standards manager for offshore operations, Jonathan Wilson, testified by phone from London about how after the grounding, the damaged Kulluk was towed from Kiluida Bay back to Dutch Harbor by three vessels with heavy tow gear. The vessels between them had 300 metric tons of pulling power, compared to 200 tons for the **Aiviq** alone. A backup tugboat and an oil-spill response vessel added to the flotilla.

Shell lawyer Gregory Linsin asked Wilson his reaction to earlier sworn testimony by a Shell contractor, warranty surveyor Anthony Flynn of oil and gas consultant GL Noble Denton. The company was hired to verify the Aiviq-Kulluk tow setup. Wilson testified that he was surprised when Flynn said his work wasn't intended to check the adequacy of the setup against marine industry standards or engineering calculations but just was making sure the gear conformed with Shell's tow plan. Shell now is doing an internal review of its worldwide towing operations, Wilson said.

Source : Stars & Stripes

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NAVY NEWS

Russia to send nuclear submarines to southern seas

Russia plans to resume nuclear submarine patrols in the southern seas after a hiatus of more than 20 years following the break-up of the Soviet Union, Itar-Tass news agency reported on Saturday, in another example of efforts to revive Moscow's military.



The plan to send **Borei-class** submarines, designed to carry 16 long-range nuclear missiles, to the southern hemisphere follows President Vladimir Putin's decision in March to deploy a naval unit in the Mediterranean Sea on a permanent basis starting this year.

"The revival of nuclear submarine patrols will allow us to fulfill the tasks of strategic deterrence not only across the North Pole but also the South Pole," state-run Itar-Tass cited an unnamed official in the military General Staff as saying.

The official said the patrols would be phased in over several years. The **Yuri Dolgoruky**, the first of eight Borei-class

submarines that Russia hopes to launch by 2020, entered service this year. Putin has stressed the importance of a strong and agile military since returning to the presidency last May. In 13 years in power, he has often cited external threats when talking of the need for a reliable armed forces and Russian political unity.

Fears of a nuclear confrontation between Russia and the United States has eased in recent years, and the Cold War-era foes signed a landmark treaty in 2010 setting lower limits on the size of their long-range nuclear arsenals.

But the limited numbers of warheads and delivery vehicles such as submarines that they committed to under the New START treaty are still enough to devastate the world. Putin has made clear Russia will continue to upgrade its arsenal.

Russia's land-launched Intercontinental Ballistic Missiles (ICBMs) would fly over the northern part of the globe, as would those fired from submarines in the northern hemisphere. Both the Borei-class submarines and the Bulava ballistic missiles they carry were designed in the 1990s, when the science and defense industries were severely underfunded. Russia sees the Bulava as the backbone of its future nuclear deterrence, but the program has been set back by several botched launches over the past few years. **Source : Reuters**

The Global Naval Vessels and Surface Combatants Market 2013 – 2023

<http://www.reportlinker.com/p01203691/The-Global-Naval-Vessels-and-Surface-Combatants-Market-2013-2023.html>

This report is the result of SDI's extensive market and company research covering the global Naval Vessels and Surface Combatants industry. It provides detailed analysis of both historic and forecast global industry values, factors influencing demand, the challenges faced by industry participants, analysis of the leading companies in the industry, and key news.

Summary

Why was the report written?"The Global Naval Vessels and Surface Combatants Market 2013–2023" offers the reader detailed analysis of the global Naval Vessels and Surface Combatants market over the next ten years, alongside potential market opportunities to enter the industry, using detailed market size forecasts.

What are the key drivers behind recent market changes?

The global naval vessels and surface combatants market is estimated to value US\$28.9 billion in 2013, and will increase at a CAGR of 0.2% during the forecast period, to reach US\$29.3 billion by 2023. The market is primarily driven by the need to replace the existing aging fleet in North America and Europe, the aggressive modernization strategies adopted by developing economies such as India, China, and Brazil drive the market in Asia-Pacific and Latin America. The global market is expected to achieve a cumulative value of US\$300.7 billion during the forecast period, and the Naval Vessels and Surface Combatants market is expected to be dominated by North America, followed by Asia Pacific and Europe.

What makes this report unique and essential to read?"The Global Naval Vessels and Surface Combatants Market 2013–2023" provides detailed analysis of the current industry size and growth expectations from 2013 to 2023, including highlights of key growth stimulators. It also benchmarks the industry against key global markets and provides detailed understanding of emerging opportunities in specific areas.

Scope

The report provides detailed analysis of the market for Naval Vessels and Surface Combatants during 2013–2023, including the factors that influence the reasons that countries are investing in or cutting defense expenditure. It provides detailed expectations of growth rates and projected total expenditure.

Kockums, Daewoo Shipbuilding & Marine Engineering, Huntington Ingalls Industries, FincantieriBAE Systems, Hyundai Heavy Industries, PO Sevmash, ThyssenKrupp Marine Systems , Thales,Lockheed Martin, ASC Pty Ltd., Damen Schelde Naval Shipbuilding (DSNS), Abu Dhabi Ship building, DCNS, Navantia, General Dynamics, Austal, Rolls-Royce Plc., and Mazagon Docks

An increase in coalition missions, such as international peacekeeping missions, offshore operations, and disaster relief operations, have created a need for interoperable weapon systems that adhere to the standards set by NATO and other organizations. An increase in out-of-area operations has also created a need for participating nations to acquire interoperability with key coalition partners. At the same time, Foreign shipbuilding companies looking for export opportunities are establishing local subsidiaries to enable them to cater to local markets, offering opportunities to domestically established companies. Repair and maintenance contracts can also be undertaken by these companies, increasing business volumes.

Reasons To Buy

North America and Europe account for around 80% of global defense spending; however, the global economic downturn and European debt crisis have negatively impacted defense spending, and allocation for naval surface combatants is expected to decline during the forecast period. For example, the US, the world's largest defense spender, announced defense budget cuts of US\$178 billion during 2011–2015; the UK government also announced defense budget cuts, and reduced its number of frigates by four and decided to decommission its aircraft carrier, **HMS Ark Royal**, earlier than previously planned. The spending capability of governments around the globe has been affected by the economic slowdown, which is forcing governments to look for alternative ways to equip their armed forces. Defense ministries are spending on modernizing and extending the working lives of existing naval fleets rather than buying new equipment; these mid-life upgrade programs enable governments with constrained financial resources to postpone expenditure on new systems until economic growth is restored and fiscal debt is under control. These upgrade and mid-life extension programs have led to the dampening of demand for new naval surface combatants.

Demand to integrate weapon systems to enable navy fleets to perform multi-role operations will result in cost overruns. Additionally, an increase in the cost of weapon systems and other parts due to program delays will also increase overall program costs. Negotiations regarding costs between a country planning an equipment program and the program's main contractor typically take several years to finalize, during which time the costs of the various weapon systems and other parts to be installed will also rise, leading to further cost overruns.

Key Highlights

North America accounts for the highest expenditure in the global naval vessels and surface combatants market; most of this expenditure can be attributed to the US, with Canada accounting for a small share. A major portion of the expenditure is expected to be towards the country's plan to commission additional **USS Arleigh Burke, DDG-51**-Flight IIA class destroyers until 2016, and to procure upgraded DDG-51 Flight III destroyers beyond 2016. In addition, it is also expected that the US DoD will invest a substantial amount to replace its aging aircraft carriers and amphibious ships; moreover, with an increased focus on the decentralization of naval attacks, the US Navy has increased its focus on small patrol vessels and corvettes with modular designs for multiple purposes.

Maritime transport accounts for 90% of global trade, as a result of which, countries across the world are compelled to secure their sea lanes. Potential adversaries such as hostile nations, pirates, drug smugglers, and terrorist organizations use the sea to move personnel and weapons, and countries are investing in naval vessels in order to prevent adversaries from controlling sea lanes and also to participate in peacekeeping operations.

A significant increase in the number of submarines during the forecast period, especially in the Asia Pacific region, is likely to result in an increase in vulnerability to submarine attack for various countries worldwide. As a result, various countries are looking to acquire vessels such as stealth frigates, corvettes, and destroyers equipped with anti-submarine warfare capabilities, such as Abu Dhabi-class corvettes and FREMM-class frigates. In addition, equipping cruisers, destroyers, and frigates with ballistic missile defense capabilities is increasingly gaining ground. These factors will continue to compel countries to allocate a significant level of their capital expenditures towards the acquisition of naval vessels with anti-submarine warfare (ASW) and ballistic missile defense (BMD) capabilities. **Source : Press Release: Reportlinker**

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General Dynamics NASSCO to Construct Four Product Tankers for American Petroleum Tankers

General Dynamics NASSCO, a wholly owned subsidiary of General Dynamics (GD), announced that it has entered into a contract with an affiliate of **American Petroleum Tankers (APT)**, a company majority owned by funds managed by Blackstone on behalf of its investors, for the design and construction of four 50,000 deadweight ton LNG-conversion-ready product carriers with a 330,000 barrel cargo capacity. The contract includes options to build four additional ships.

Construction of the first tanker is scheduled to begin in the third quarter of 2014, with deliveries scheduled to begin in the fourth quarter of 2015, continuing through 2016. The four-ship APT contract will add up to approximately 800 jobs at NASSCO during construction and more than 165 seagoing union jobs during the operation of the vessels.

The 610-foot-long tankers are a new "ECO" design that offers improved fuel efficiency and incorporates the latest environmental protection features, including a Ballast Water Treatment System. All of the ECO-class tankers will be constructed at the NASSCO shipyard in San Diego. This contract builds upon the strong relationship NASSCO and APT developed during the construction of five State-class product carriers from 2007 to 2010.

The ships will be designed by DSEC, a subsidiary of Daewoo Shipbuilding & Marine Engineering (DSME) of Busan, South Korea. DSEC's ECO design achieves improved fuel efficiency through several features, including a G-series MAN ME slow-speed main engine and an optimized hull form. The tankers will have dual-fuel-capable auxiliary engines and the ability to accommodate future installation of an LNG fuel-gas system. The ECO-class tankers represent the continuation of NASSCO's successful partnership with DSEC, which was a partner on the five APT State-class product tankers and currently is contributing to two LNG-powered containerships for TOTE Shipholdings, Inc.

Fred Harris, President of General Dynamics NASSCO, said, "By continuing to bring the most economical and environmentally sound technology to Jones Act operators, these ECO tankers show our continued commitment to be one of the most innovative shipyards in America. I am pleased to renew our partnership with APT on this exciting new program. Along with TOTE, this is the second return customer we have welcomed back to NASSCO within the past six months, which speaks to the high-quality workmanship of our skilled workforce." The construction and operation of the new vessels are aligned with the Jones Act, which requires that ships carrying cargo between U.S. ports be built in U.S. shipyards.

Rob Kurz, CEO of APT, said, "This investment demonstrates our continued commitment to building and operating ships for the U.S. Jones Act trade. We are proud to bring new U.S.-built tonnage into the market at this exciting time, helping our country achieve its long-standing strategic objective of energy independence."

Sean Klimczak, Senior Managing Director of Blackstone, said, "This investment demonstrates our long-standing support of the U.S. maritime industry and our commitment to bolstering job creation in the U.S. We are pleased to partner again with NASSCO on this important newbuild program and to provide growth equity to APT to construct and bring these new, state-of-the-art vessels to market." For more information about General Dynamics NASSCO, please visit www.nassco.com. More information about General Dynamics is available online at www.generaldynamics.com.

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One of the smallest sea going hopper dredgers of [Boskalis](#) the [SOSPAN DAU](#), working to stabilize the sea defense of Pevensey, it's near Eastbourne. The dredge area is near Shoreham, so it's a 40 miles of sailing to the discharge area. The hopper will come every high tide to discharge, the tide range is about 6 meters. [Photo : Lennart Mastenbroek \(c\)](#)

Shipping Lines Honored for Green Leadership

Twenty shipping lines were honored by the Port of Long Beach for efforts to improve air quality locally by slowing down or deploying cleaner vessels - or both - at the annual Green Flag and Green Ship awards. The Port's Green Flag Program was created in 2005 and participation is nearly universal. In 2012, almost 96 percent of all ships calling at Long Beach slowed to 12 knots within 20 nautical miles of the Port. In 2009, the Port added the 40 nautical mile option and last year, more than 83 percent of vessels slowed from 40 nautical miles. Slower ships burn less fuel, producing less pollution. Thirteen shipping lines were found to be top performers, earning Green Flags this year. Meanwhile, 10 shipping lines received the first Green Ship awards, a program that since July 2012 has encouraged vessel operators to assign the cleanest ships to Long Beach. Three of the companies collected both Green Flags and Green Ship awards today. These programs offer financial incentives. Green Flag participants were awarded \$2.5 million in dockage fee discounts in 2012. And since the Green Ship Program began in July 2012, the Port has awarded \$135,000 in incentives. Since the launch of the ship-slowng program in 2005, more than 200 vessel operators have been awarded Green Flags and qualified for reductions on dockage fees. The program has been instrumental in helping the Port decrease diesel pollution from all port-related operations by 75 percent since 2005. The Green Ship program, which accelerates the deployment of newer, greener ships, aims to achieve further air quality improvements.

Source: Port of Long Beach

Gulf Rigs Stand Ready as Hurricane Season Arrives

At a distance from a helicopter hovering over the Gulf of Mexico, Chevron's [South Timbalier 52](#) production platform seems like a speck, and it is easy to see how vulnerable it would be to a ferocious hurricane. Then you land and step out into a giant facility buzzing with activity from dozens of workers, That's when you begin to get a sense of what is at stake.

With the start of the 2013 Atlantic hurricane season kicking off officially on Saturday, Chevron and all the other companies operating in the Gulf are finalizing their hurricane response plans. Those plans could get a lot of use if forecasts for an active season prove accurate. The [South Timbalier 52](#) facility, 30 miles offshore on the continental shelf, is one of more than 600 Chevron structures in the Gulf. It pumps about 2,900 barrels of oil per day. Around 60 people live and work on the platform, two weeks on and two weeks off. It operates 24 hours a day, 365 days a year, with a full-time kitchen, medical facilities on call, and all the comforts of home—at least the ones that are feasible on an oil rig. And just like at home, the start of hurricane season is also peak construction season—the time to do

maintenance and improvements. Scaffolding covers portions of the structure, and two giant vessels known as lift boats are docked adjacent to the rig for support.

Even the threat of an early start to the storm season—say, a tropical depression 200 miles away, would require all of that to be dismantled in phase one of Chevron's carefully choreographed hurricane response plan, which calls for non-essential personnel and equipment to be moved. Taking down the construction scaffolding is a major project in itself. All of it would have to be disassembled and moved ashore.

"In an event of a hurricane, we'd have to get all this stuff rigged down, should take us about a day and a half or so," said Chevron operations supervisor David Bond, a burly oil rig worker out of central casting, who has worked 33 years offshore and would not trade this life for anything in the world.

"Oh, I love it out here," Bond said. Hurricane preparations—and evacuations—are all in a day's work. They can happen many times in a season, even though more often than not the storm does not come anywhere close. But the companies cannot afford to take any chances.

The cost of shutting down a rig varies by each structure. On the South Timbalier 52 platform, for example, losing a day of production, during which 2,900 barrels is typically pumped, could cost Chevron as much as \$270,000 based on average oil prices this year of \$94 a barrel. That's just the estimated cost of production lost, and doesn't include costs for evacuation and re-mobilization. And the South Timbalier 52 is not one of Chevron's biggest producers in the Gulf. Some platform's losses could be millions of dollars a day. Chevron said decisions ahead of hurricanes are based solely on safety, and not money. Chevron Vice President Warner Williams said of safety versus costs: "It's not a balance. I would say we can always get the production. The key thing is to get the folks off safely in the time allotted to us to do that."

As a storm gets closer—or forecasts call for it to come anywhere near the facility, the support staff—the so-called non-essential workers—are airlifted ashore. That leaves a core group of production workers and supervisors in the final phase of the evacuation plan. Bond has been in that position many times, and he admits it can get a bit eerie.

"It starts to get almost kind of lonely out here," Bond said. "We are used to all these guys being here; we live with them day in and day out so when they leave almost a part of us leaves with them. Then we get down to our skeleton crew, which we are never at our skeleton crew unless a storm is coming. Well, then it starts to kind of hit home a little bit that we gotta leave. We start worrying about our families and things like that but then we kick into phase three and the professionalism kicks in."

The control room of the platform looks like little more than an office, with a couple of desks and computer terminals. But in many ways it is the heart of the operation. Here, workers can control every well and valve attached to the platform. Everything must be shut in and secured before the last workers leave. Even a small mistake, combined with the fury of a hurricane, could trigger an environmental disaster. That is why it is important to stay focused, Bond said.

"We start getting calls from home, wives, and kids wanting to know when we are coming in well that starts to get a little bit tough but you have to work through it and be professional."

Not easy, Bond said, with rising waves and escalating winds—on a vulnerable oil rig in the middle of the Gulf.

"Some of the newer guys who have not been through a lot of storm seasons so we kind of mentor them and bring them along with us. They don't see us getting scared, or whatever. They tend to not want to show it either. It's almost like your brothers--you don't want to show that you are emotional so we keep it light, play jokes on each other."

Chevron operations supervisor David Bond describes the preparation for hurricane season, with CNBC's Scott Cohn. A similar routine is playing out on the more than 600 structures Chevron operates in the Gulf, ranging from small rigs to deep water platforms and drill ships. Some 2,500 people are working for Chevron in the Gulf on a normal day. If a hurricane or even a tropical storm enters the Gulf, every facility must be secured and every worker must be brought ashore—a massive undertaking.

Most of the workers are airlifted to shore. Because Chevron—unique among the major oil companies—owns its own fleet of helicopters, that challenge falls to the company as well.

The operation is choreographed from a sophisticated command center in Covington, Louisiana. The facility, opened in 2008, is roughly 100 miles inland—a lesson from Hurricane Katrina in 2005, when the previous facility in downtown New Orleans flooded.

Here, teams of managers make minute-by-minute decisions about evacuations. And while shutting an oil well at the mere hint of a storm is an expensive proposition, officials insist safety is the overriding concern. Nonetheless, the system is set up to keep supply disruptions to a minimum with the help of the technology in the new command center.

The facility includes sophisticated computer screens that allow workers to track every vessel, every facility, and most important, every individual working in the Gulf, almost in real time.

Chevron's Williams said that used to be done with Post-It notes on a map. The macabre joke—and an argument for a better system—used to be that if one of those notes falls behind a desk, all those people are missing.

"One of the things that we have done over time is to make better decisions and utilize our equipment better," Williams said. "Being here in this location, being in a building that is highly technical has been a big benefit to us."

Another room in the command center is filled with computer terminals just like the ones in the control room on the South Timbalier 52 platform. There is one desk for every major rig, allowing the facilities to be operated by remote control. In fact, operators from evacuated rigs are brought here so they can monitor their equipment and make certain it has weathered the storm—even operating some of the equipment by remote control.

"We can now talk to every platform we got, every asset we got, whether it be a helicopter or a boat," says Chevron general manager Mike Casey. That capability is especially important after the storm passes, when Chevron needs to get its production back up to speed as quickly and efficiently as it shut it down. But the re-mobilization or "re-mob" is often much more complicated than the evacuation, because they need to make certain the offshore equipment is still safe to operate—and live in.

And unlike the evacuation plans that are in place before hurricane season begins, they can not come up with a re-mobilization plan until after they know what damage the storm did. Plus, some workers may be unable to get back offshore if their homes were damaged in the storm. But operations supervisor David Banks said workers worry about their second homes—the ones offshore—almost as much as their own homes, and they want to get back to work..

"Once we leave here," he said, "we gotta stay in touch with each other because we'll be coming right back as soon as the storm passes." **Source : CNBC –Energy**



Liverpool2 port project begins

Peel Ports has welcomed the news this week that Liverpool's maritime sector in the UK has received a £35m regional growth fund (RGF) grant from the government - now the operator can begin to realise its expansion plans at the Port of Liverpool.

The grant will be used to fund a project to dredge the approach channel in the Mersey Estuary which is part of the wider £300m Liverpool2 terminal project aimed at enabling bigger ships to dock at Port Seaforth.

This week, Chancellor George Osborne kicked off the dredging and steel piling work for the new terminal, which is expected to be open for business in 2015. A Peel Ports spokesperson told Port Strategy: "By deepening the approach channel of the Mersey to 16 metres the RGF grant will allow access for post-Panamax size container ships as well as widening the tidal access window for a range of other river users. As a result the grant will support the creation, expansion and protection of thousands of jobs and businesses dependent on the river."

The new Liverpool2 terminal is being built on reclaimed land in the River Mersey. It will enable some of the world's largest container vessels - up to 13,500teu - to call directly to the Port of Liverpool. At the moment vessel size is restricted by the lock access to the docks system. Peel Ports says that making the Port of Liverpool accessible to these larger vessels will help to rebalance national freight movements in the UK. Currently more than 60% of imported and exported containers destined for the North of the UK actually enter the country through ports in the South and South East, resulting in 150 million unnecessary road miles and 20 million tonnes of damaging carbon. The cost to the UK economy because of this is huge – an estimated £225m with infamously serious congestion caused to roads – an issue which is badly in need of redress. **Source : Port Strategy**



The **BBC SPRING** departing Amsterdam – Vlohaven bound for Ulsan in South Korea. Loaded with project cargo including 3 off Pedestal Cranes for an Offshore Project. Cranes are fully assembled and secured on the weatherdeck cargo. Loading was done using ship's gear. **Photo top : Maurice Race / Photo : below : Jan Plug (c)**



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Damaged cruise ship to be repaired by mid-July

Royal Caribbean says a cruise ship damaged by fire during a trip from Baltimore to the Bahamas is expected to be back in service by mid-July. Company spokeswoman Cynthia Martinez says in an email Thursday that the **Grandeur of the Seas** is expected to be back in service for a July 12 sailing. No one was injured in Monday's fire, but passengers on board were sent home and promised full refunds and credit for a future cruise. A cruise set to start Friday was immediately canceled and travelers were given a refund and a 50 percent cruise credit.

The company cancelled another five cruises, mostly in June. The company says travelers will receive a refund and a 25 percent credit. No cause of the fire has been released. **Source : sfgate.**



Doeksen's **TIGER** departing from West Terschelling bound for Harlingen **Photo : Piet Sinke ©**

A photograph of an offshore wind farm at sunset. The wind turbines are silhouetted against a colorful sky with orange and pink hues. The structure is illuminated with lights.

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More water for West Kochi

The long overdue HUDCO (Housing and Urban Development Corporation Ltd) drinking water project which will cater to Palluruthy, Edakochi, Fort Kochi and Mattancherry areas was commissioned on Friday.

Minister for excise K. Babu inaugurated the project in the presence of union minister K.V. Thomas, Dominic Presentation MLA and Mayor Tony Chammany. With the commissioning of the project, the areas will get 15 MLD of water in addition to the 5 MLD of water only that is being pumped at present. Meanwhile, there are widespread complaints that pumping more water to west Kochi areas has resulted in disruption in normal water supply to several other areas in the city and outskirts. A permanent system should be put in place for balanced water supply to both the

city and west Kochi areas, it is felt. Deviation of water to west Kochi area has resulted in poor supply to areas in neighbouring municipalities including Kalamassery and Thrikkakkara. It is after the interconnection work done in Karanakodam, to enhance water supply to west Kochi region that the supply to these areas was disrupted.

However, Karuvelipady division councillor P.S Prakash termed the allegations as baseless saying that the KWA was responsible for providing the exact quantity of water promised as per the norms of the project. "Residents of west Kochi have been reeling under acute water scarcity for years even during the monsoons. The corporation has been spending huge amounts for potable water supply through tankers. Even though the area will get additional water, a considerable quantity of it is being sold to agencies like Port Trust, Navy and Cochin Shipyard," he said. **Source :** Deccan Chronicle

.... PHOTO OF THE DAY



The **GSP QUEEN** in Constanta - **Photo : Daniel Neagu ©**

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