



Tasmanian Polar Network and Tasmania Maritime Network

Response to the Hobart Railyards Urban Design Strategy



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Introduction

This is a combined response to an invitation to comment on the draft Hobart Railyards Urban Design Strategy. It outlines the issues and concerns raised by the maritime industry users of the Port of Hobart and their representative bodies, the Tasmanian Polar Network (TPN) and Tasmania Maritime Network (TMN). The submission includes a number of recommendations to address the concerns.

The SCWA Hobart Railyards Urban Design Strategy has emerged against a background of adverse trends affecting maritime industry use of the Port of Hobart, including

- lack of master plan that considers wider context of industry requirements in relation to entire port system and facilities (eg Princes Wharf)
- non-port related commercial and community land uses in and close to Port of Hobart is constraining the operations of shipping and maritime activities
- a reduction in port capacity through the progressive non-shipping uses of wharf apron areas such as CSIRO site, Elizabeth pier and (soon) Macquarie Wharf No. 1 shed
- the poor state of port infrastructure and restrictions placed on use of Macquarie No 5 and No 6 berths and the container crane in particular
- the damage to international reputation and capability of Hobart as working port and international Antarctic Gateway.

The review of the Hobart Railyards Urban Design Strategy and consultation process is an opportunity to address these legacy issues and new concerns arising from proposals for developing the waterfront and a new hospital.





Vision for the Port of Hobart

- The Port of Hobart's infrastructure and services meet the existing and future needs of sea trade from Southern Tasmania and the Antarctic and Southern Ocean, cruise tourism, defence and fishing industries.

Action needed to achieve the vision

- Ensure sufficient land is available for storage, quarantine, heavy material handling equipment and other services that support shipping movements and maritime activity
- Ensure water and land based port activities can operate effectively and efficiently – safety, security, noise, spill lighting, management of contaminated and hazardous materials, heavy machinery and vehicle movements to, from and within the port
- Reinvest to maintain and enhance existing wharf and other port infrastructure to meet current and future needs





Industry opportunities and challenges

The Port of Hobart supports international and coastal shipping and a range of maritime activities that are growing and have the potential to grow further.

Sea trade

In 2006-07 exports from the Port of Hobart increased by 27 per cent to 840,000 tonnes and imports 0.5 per cent to more than one million tonnes. This figure excludes recent new business such as exports of rotary peeled veneer.

Appendix One illustrates this point. This photograph taken in August 2008, a traditionally quiet time at the port, depicts the port storage apron full to capacity.

The dynamics of future ship design, fuel costs and road and rail transport trends and policy could create a future environment that increases the attractiveness of coastal and international sea trade from Hobart. The planning regime must permit the Port of Hobart to retain the flexibility to meet this possibility.

The Port of Hobart must also be capable of meeting contingencies such as the breakdown of transport infrastructure including rail and road services to northern ports.

The opportunity to trade now and in the future must not be compromised by insufficient or inadequate port infrastructure or land use changes that restrict the capacity of the port to meet current or future needs.

Antarctic and Southern Ocean

Hobart is the home port for the Australian and French marine research and Antarctic re-supply vessels. Other international marine research and Antarctic vessels and East Antarctic research stations are supplied and serviced from Hobart on an as needs basis.

Previous research has shown a steady growth in the Tasmanian Antarctic sector. At the end of 1994-1995, the sector was worth \$82.5 million. Since then it has grown to its current size of \$147.7 million in the 2006-2007 financial year. This represents a total aggregate growth of 79.1%, which corresponds to an average annual growth rate of 6.1%.



The Russian Antarctic Expedition is seriously considering an invitation by the TPN to use Hobart as a point of embarkation to Antarctica.

The perception of adequate and sustainable port infrastructure now and in the longer term is very important factor in decisions to locate Antarctic and Southern Ocean re-supply in Tasmania.

If Tasmania loses research expeditions re-supply activities to other locations such as Fremantle, it is possible that the scientific and other associated services will re-locate as well.

Antarctic tourism is an emerging growth area with numbers increasing from 6,700 in 1992-93 to 29,500 in 2006-07. There is increasing interest in tours in the East Antarctic region and Tasmania is a viable embarkation point.

For example Aurora Expeditions spent an estimated \$1.25 million dollars in Hobart on pre-voyage preparation and re-supply activities in 2005-06. Two 25 day tours by Aurora Expeditions are scheduled to embark and return to Hobart in 2008-09. In recognition of the growing interest in Hobart as a departure point for Antarctic cruise ship tourism, the State Government is supporting the development of an Antarctic Tourism marketing strategy.

Veolia Environmental Services is responsible for waste and resource recovery of Return to Australia waste (RTA) on both Antarctic vessels. For this procedure a quarantine approved facility is required on site. Presently this site is on Macquarie Wharf and this needs to be within a restricted access area. There is only one quarantine approved wash facility in Hobart which is on the wharf. Veolia also service the two Antarctic vessels during winter when they are berthed at Princes Wharf. Both activities involve the movement of forklifts and trucks.

Veolia is also involved in the return of historic contaminated materials from old land fills from Antarctica. This is a separate project to the regular servicing of the Antarctic vessels and it requires setting up separate quarantine site within the Macquarie Wharf area. Land and facilities at the Port of Hobart for rigid quarantine and security of this material and buffer areas for spray drift must remain available for this service to continue.



Ship repair and maintenance

The Port of Hobart has long supported ship refit repair and maintenance of large vessels.

This activity contributes to retaining, developing and growing the maritime sector in Southern Tasmania as the assets and skills are largely interchangeable with shipbuilding.

Recent examples of refit repair and maintenance of large ships and marine structures include

- the \$8 million refurbishment of the 194 metre 29,000tonne Spirit of Tasmania III including the addition of a new superstructure on Deck 10 to house 32 new crew cabins and the refit of public spaces including restaurants, café, library, cinema, shops, lounges and a new atrium area
- \$4 million refit of the New Zealand based 148metre 13,600 tonne passenger train and car ferry *The Arahura* including toilets, food court, shop, children's' play room, picture theatre and vehicle deck
- refit, repair, maintenance and servicing Antarctic, international and coastal shipping for merchant, naval and fishing industries.

Taylor Bros are currently looking at two major defence contracts for refit, repair and maintenance.

In late 2007 Tasports advised that an oil rig "Ocean Patriot" was unable to be accommodated at Macquarie Wharf in the Port of Hobart and the \$13.7 million in refurbishment and survey work was ultimately undertaken at Portland in Victoria. Associated expenditure included \$1.5 million in accommodation and 320 workers using restaurants.

While some Tasmanian firms travelled to Portland to work on the project, the loss of the "Ocean Patriot" project and future opportunities highlights the consequences of insufficient or inadequate wharf capacity and/or associated land based port services on the broader economy through loss of accommodation and food service business (of fly-in labour) and adverse perceptions of Tasmania's capacity to undertake larger projects requiring berths, wharf apron work space and access to port facilities.



Ocean Patriot, Portland Victoria 2008



Cruise Shipping

There were just over 57,600 visitors to Tasmania in the 2006-07 Tasmanian cruise ship season (Sep – Apr), representing approximately 7% of all visitors to the State.

A study on cruise shipping in Australia by Access Economics found just under half the 44 cruise ship visits to Tasmania in 2006-07 berthed at Hobart. Hobart accounted for about half the total estimated expenditure of \$22.8 million.

The study lists Hobart's access to multiple deep water berths as a key factor in the capacity of Tasmania to develop cruise tourism.

Access Economics, Tasports and industry expects this market to grow further and Tasports has identified cruise shipping as an important opportunity for the Port of Hobart.

An article in the Brisbane Times on 11 May 2008 highlights the critical importance of planning for the future and ensuring that adequate provision is made for port infrastructure to be updated or expanded to meet user needs following the decision to establish a multi-use multi use (residential, commercial, cruise) Multiplex Portside Terminal that has drastically compromised cruise ship operations by not being sited where the cruise operators required, but rather to suit the developers of the apartments and retail tenancies.

"Ann Sherry, the chief executive of Carnival Australia, which represents cruise lines including P&O Cruises, Princess Cruises and Cunard, said cruise liners were getting bigger and Queensland would soon face major problems attracting business.

She said Brisbane needed another terminal at the bayside end of the Brisbane River so bigger ships would avoid the problem of being too high to go under the Gateway Bridge.

The people who live around Portside Wharf are not enamoured with the noise associated with visiting cruise ships. Any new terminal should not be built near residential areas, Ms Sherry said."





In June 2008, ABC News reported that the situation had come to a head with Cunard cruise line indicating it would bypass Brisbane for Cairns in the future because their large ships were unable to use the existing facility and passengers had been forced to wade through flooded temporary facilities. Queensland Opposition spokeswoman Fiona Simpson was quoted as saying

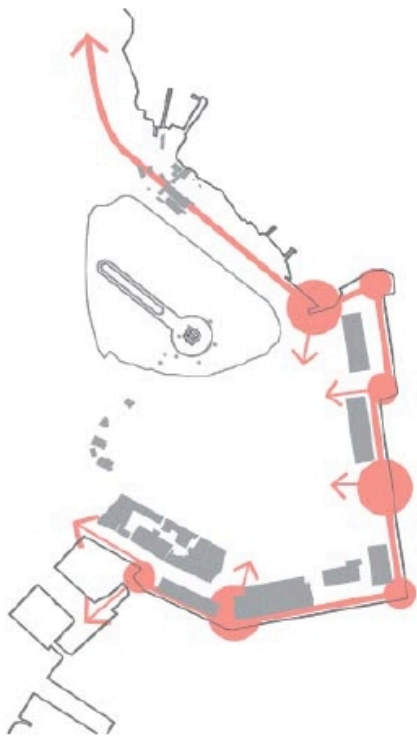
“This is an embarrassment to the State Government and it’s a blow to the tourism industry.”

And then as recently as 8 August, The Australian reported that

“Cruise ship giant Carnival Australia has joined the coal miners and other bulk commodity shippers in urging government action to ease port constraints, especially in Sydney and Brisbane.

Carnival [had] used the results of a company-sponsored economic study to support its claim that the investment was needed to prevent cruise operators from being lured to better-credentialed Asian ports.”

At present the major cruise lines are very happy with the "simple" but effective facilities available in Hobart including large wharf aprons, easy access to the city and reasonable port costs. The situation in Queensland clearly demonstrates that the Port of Hobart must retain the capacity to meet future demands not just present day needs.



Key issues and concerns

The draft SCWA Hobart Railyards Urban Design Strategy and planned hospital raise important questions.

- How is the Hobart Port to respond to increasing demand now and into the future if it is restricted in space and has limited facilities? This submission demonstrates future growth in the areas of Antarctic Shipping and Cruise Liners, and repair and maintenance.
- Given this future growth and related concern regarding the ability for the port to maintain current operations and make allowances for future needs, has consideration been given to the fact that dimensional requirements need clear definition for space, handling and separation purposes, and that these allowances are imperative to the successful and sustainable operations of the Port of Hobart. The categories include:
 - wharf storage space for both incoming and outgoing product, including bonded goods in the case of Antarctic freight
 - cargo handling space for access and loading/unloading operations such as cranes and forklift trucks
 - buffering space to deal with noise and emissions of air-born particles and spays

Related to this is the anticipated existence of established and accepted industry standards on dimensional requirements that neither the TPN nor TMN have the resources to investigate or address. Has the SCWA addressed these issues and if so the TPN and TMN would welcome the opportunity to review the processes undertaken and conclusions reached.

- It is our understanding that the usual context of land use planning in Tasmania allows for at least three defined land uses along the lines of – ‘Permitted’, Discretionary’ and ‘Prohibited’. If so, we would question whether such tenets would be applied to land use planning around the Sullivan’s Cove precinct. It would seem that some of the proposed permitted uses such as hotels and hospitals do not fit well with the established/prior land use of the working port and if they are allowed then potential objections against the port are likely to arise from users of these non-port facilities threatening at the very least, the port’s working hours, and at worst its entire operation.
- We note the SCWA’s frequent references to the precinct needing a ‘gritty edge’ but neither understand what this means, nor accept that such is an appropriate means by which to allow the proposed uses.

■



- Research shows that ships are increasing in size due to factors including rising fuel costs. Hobart being the second-deepest natural port in the world and easily accessible, has the potential to attract the larger ships that cannot get into most other Australian ports. One has to take a long-term strategic view to foresee that Hobart has a competitive advantage over all other ports to attract these kinds of ships.
- What strategies does the State Government have in place to ensure Hobart Port's natural attributes are being used to their full potential, both now and into the future?
- If the Tasports has a 50-year plan for the Hobart Port, what does it envisage for the future of the Hobart Port and when will stakeholders be given the opportunity to provide input into this plan?
- What is the future of Macquarie Wharf 5 and 6? If both these wharves are returned back to a working status they are ideal places for vessel layup, repairs and maintenance of ships.
- How is the Government going to respond to conflicts that arise due to conflicting activities being situated in close proximity to one another - i.e. the hospital and public access to hazardous areas?
- The people who work on the port are inducted and trained to work in hazardous zones. How is the public to understand the significant hazards within a working port without such induction and training?
- How is sufficient area for the rail head and associated working area to be accommodated along with a hospital and other proposed land uses?
- How will the safe and effective operation of heavy and other road vehicle transport to, from and within the port be accommodated if the area of the port area is reduced.
- As a host port to Australian and international navy vessels, has consideration been given to placing civilian activities adjacent to a potential target zone.



What is a working port?

The land use planning and development of Sullivans Cove must take account of the full range of maritime uses of a working port, not elements in isolation. Maritime facilities and activities within a working port include

- Ship berths and wharf apron
- Maritime cargo storage and handling and space for maneuvering cargo
- Buffer areas between the port and adjoining or proximate land uses
- Ship refit, repair and maintenance services and facilities
- Maritime provisions and supply facilities
- Marine equipment and services
- Bond storage
- Heavy vehicle and other road transport to, from and within the port
- Rail head and shunting yards
- Security that complies with Australian Government legislation and requirements of DOTARS
- Handling hazardous materials
- Fish handling and processing facilities
- Cruise ship terminals
- Marinas and boat launching facilities
- Ferry boat, excursion and charter boat facilities and terminals
- Access for emergency services, clearways and emergency assembly points

Land and facilities for cargo storage, materials handling and secure customs and quarantine areas are just as important as the ship berth itself.



Need for a port-wide view

- Planning affecting the capacity of the Port of Hobart to service shipping and maritime industries must take a holistic perspective.
- The cumulative impact of individual decisions that reduce port capacity can be significant and detrimental to future port operations and the industries that rely on the port.
- Individual decisions on a new hospital, the re-development of Macquarie No.1 shed and plans for re-developing Princes Wharf No.1 shed that reduce berths or place limits on port operations will have a huge cumulative impact and cannot be considered in isolation.
- The possible impacts of future decisions to change the use of Princes Wharf No1 and No.2 must be included in an assessment of the options and impacts of limiting port activity at Macquarie Wharf as a result of a new hospital.

Reduced area for port operations

- Port operations require working areas on the wharf apron and areas behind berths for cargo storage and handling, quarantine wash down and fumigation, ship repair and maintenance, heavy transport movements and buffer area to adjacent non-port land uses.
- Removal or restrictions on the use of non-berth working areas limits the ability to berth ships at wharves.
- Tasports has indicated the minimum boundary it needs for working areas in the Macquarie Wharf precinct is more than the preferred hospital boundary.
 - Cargo requires space for manoeuvring and to lay up prior to loading on a vessel ¹
 - Provisions and supplies for Antarctic re-supply services are accumulated well before a ship visit. Storage away from the port adds cargo handling costs.
 - Wharf apron areas enable the refit, repair and maintenance industry to lay materials, operate machinery and access ships. Non-shipping uses such as cafes and restaurants on wharf aprons removes ship berth capacity and reduces the ability of the port to accommodate multiple ship visits and schedule maintenance of wharf areas.





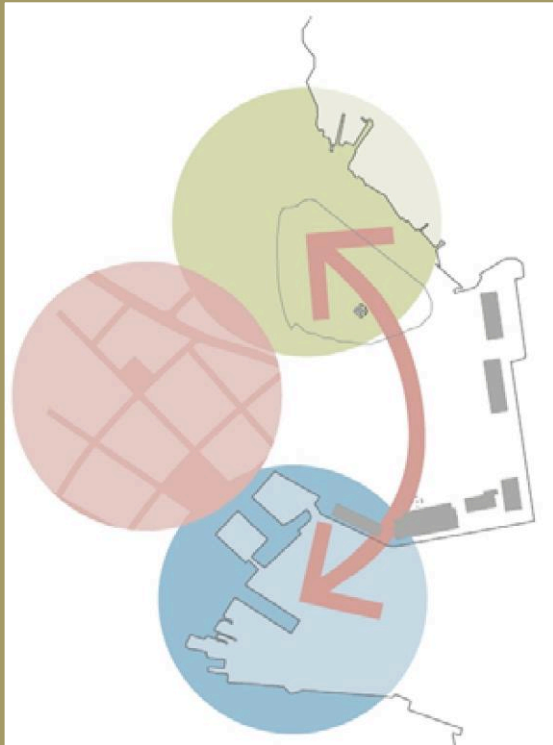
Constraints from proximity of non-maritime activity to working areas of the port

- The operation of a working port involves noise, traffic, odour, spill lighting, spay drift, hazardous materials and heavy machinery and vehicle movements 24 hours a day 7 days a week.
- Progressive non-water dependent development in and around the working areas of the port in recent years has resulted in increased calls to reduce maritime and port activity adversely affecting the amenity of residential and mixed commercial land uses.
- Noise, spill lighting, odour, dust and proximity to potential contamination and other hazards are issues raised by residents, cafes, retail shops and other non-maritime businesses in areas close to maritime activities in the Port of Hobart.
- Residents of the Silos apartments complained about noise, bright lighting, traffic and other issues during the refit and maintenance of the The Arahura at Princes Wharf. P&O report complaints about noise when maintenance is undertaken on ships berthed at Princes wharf.
- The location of a major infrastructure close to working areas of the port places pressure on port operators and users to cease some activities or restrict operations at certain times. This would be incompatible with the needs of vessels to berth, load and unload and make repairs (including at night) in order to meet shipping schedules of their owner lines.
- Non-port activities in and close to working areas of the port must not compromise the capacity of the port to service shipping and maritime industries.



Security and safety

- The security of wharf operations and safety of employees and authorised visitors in secure areas of the port is governed by international, national and State legislation and policy.
- Major Tasmanian ports significantly upgraded security to minimum criteria for preventing and suppressing acts of terrorism against ships, passengers and cargo to be compliant with the new International Ship and Port Facility Security Code (ISPS) developed by International Maritime Organisation and associated complementary Australian legislation.
- Significant safety issues such as movement of heavy machinery, transport vehicles and management of hazardous materials are associated with cargo handling and other activities within parts of the Port of Hobart. The management of these issues and duty of care to employees and authorised visitors requires that public access not be permitted.
- Access by the general public to designated secure port areas on an on-going or intermittent basis is untenable. The proposal to allow foreshore access to secure areas of Macquarie wharf on a continuous or intermittent basis would require access to restricted areas and is completely incompatible with legislative and safety obligations.



Recommendations

1. The land use planning and development of Sullivans Cove (including the railyards site) must take account of the full range of maritime uses of a working port and potential growth areas.
2. Planning for the new hospital and other non-port activities must incorporate intensive mitigation measures to offset noise, spill lighting, spray drift and other impacts of maritime activity so that maritime use of Macquarie wharf precinct is not compromised.
3. Access by the general public to designated secure and/or hazardous areas of the port on an on-going or intermittent basis compromises security, legislative requirements and the safety of the public and port users and must not be permitted.
4. Should Princes Wharf not be available for shipping and maritime activity in the future Macquarie Wharf must be extended.
5. The hospital and other non-port land uses must not reduce the capacity of the port to provide for cargo storage and handling and sufficient buffer areas to adjacent non-port land uses.
6. The preferred area for the hospital must not encroach on the minimum boundary for working port areas indicated by Tasports in its response to the proposed new hospital.
7. The State Government require Tasports to release its strategic plan for the Port of Hobart.
8. The State Government reinvests to ensure wharf and other Port of Hobart infrastructure is adequately maintained and Macquarie wharf No.5 and 6 and the container crane are returned to full service



Conclusion

Over the past few years it seems development decisions have been made that have had direct impact on the port. These decisions have been made in isolation and continue to be made on an ad hoc basis to the detriment of the working port.

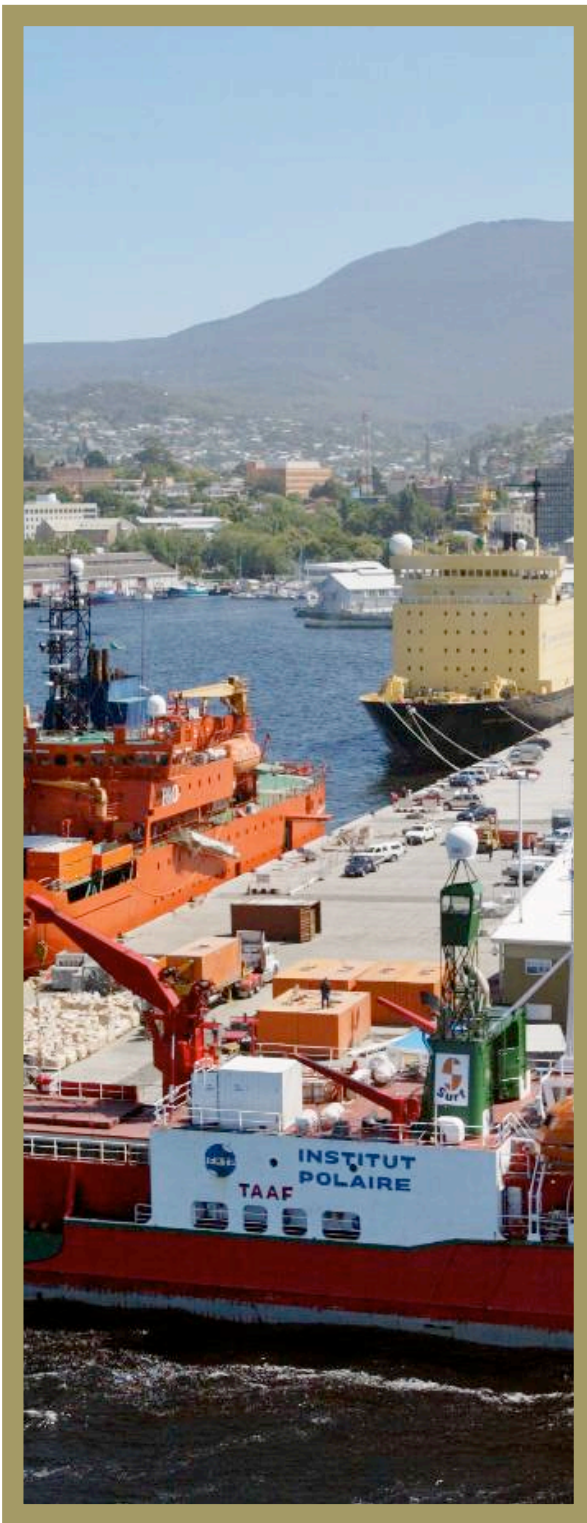
It is imperative that any development or change of use of the port be looked at in the context of the port as a whole if we are to avoid the pitfalls of permitting conflicting uses that endanger the survival of the working port or reduce the ability of the port to operate effectively and expand. We do not want a similar damaging situation of conflicting uses that was created by permitting residential development in the vicinity of Sydney Airport; and that which is currently playing out in Brisbane with the building of a multi use (residential, commercial, cruise) Multiplex Portside Terminal that has compromised cruise liner operations by not being sited where they required but rather to suit the developers of the apartments and retail tenancies.

Both the TPN and TMN have been working towards increasing business for the port and have plans in place to develop the industry further. We would hope that these plans for the expansion of the Tasmanian economy can be consulted and taken into account.

Appendices

Appendix 1: Cargo Macquarie Wharf August 2008





Appendix 2: Port of Hobart, international gateway to Antarctica

- Hobart has been a major staging post for Antarctic expeditions for more than 200 years.
- Hobart is also an important international Antarctic gateway for those accessing the Antarctic, subantarctic and the Southern Ocean. Today Tasmania provides the hub of Australia's Antarctic Program and is a centre of excellence for internationally recognised Antarctic and temperate marine science activities and other innovation from industry.
- Over 65 per cent of Australia's scientists specialising in the Antarctic and Southern Ocean field live in Hobart. It is the home to international organisations and Hobart is recognised internationally as a major centre for Antarctic science, research, management and logistics.
- Hobart has a reputation as one of the best international gateways to the East Antarctic, Subantarctic islands and the Ross Sea and Southern Ocean region.
- Hobart's deep sea port offers high quality fuel, competitive port charges and a coordinated approach to refuelling, waste disposal, customs clearance and resupply service delivery.
- Hobart is conveniently located, well-serviced, cost-effective and strategically important base for Antarctic, subantarctic and Southern Ocean programs. These attributes make Hobart an ideal choice for Antarctic, subantarctic and Southern Ocean management, research and logistic endeavours.

Appendix 3: Antarctic Sector in Tasmania

- Businesses serving the Antarctic, subantarctic and Southern Ocean community are a key industry sector for Tasmania. This sector has grown principally because Hobart, as an important international Antarctic gateway, provides the hub of Australia's Antarctic Program.
- The 2006 – 2007 Antarctic Expenditure Survey recently revealed that the Tasmanian Antarctic sector was worth approximately \$147.7 million for the 2006-2007 financial year. This is broken down into \$93.1 million for Tasmanian-sourced goods and services, labour and other expenses. Externally-sourced goods and services, labour and other expenses came to \$54.6 million. The table below details the size of the total annual Antarctic sector expenditure and its breakdown from the 1994-1995 to the 2006 - 2007 financial years.

Table 1: Antarctic Expenditure 1994-1995 to 2006-2007

	1994-1995	1995-1996	1996-1997	1997-1998	1998-1999	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005	2005-2006	2006-2007
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Total expenditure by Antarctic-related groups in Tasmania	82.48	82.74	81.63	91.57	87.85	91.77	95.68	103.03	115.70	113.14	126.40	132.11	147.73
Expenditure on goods and services sourced in Tasmania	35.57	36.48	38.65	43.89	41.62	44.12	45.30	52.23	67.16	72.30	73.22	77.24	93.17
Expenditure on goods and services sourced outside Tasmania	46.91	46.26	42.98	47.68	46.23	47.65	50.38	50.80	48.54	40.84	53.18	54.87	54.56

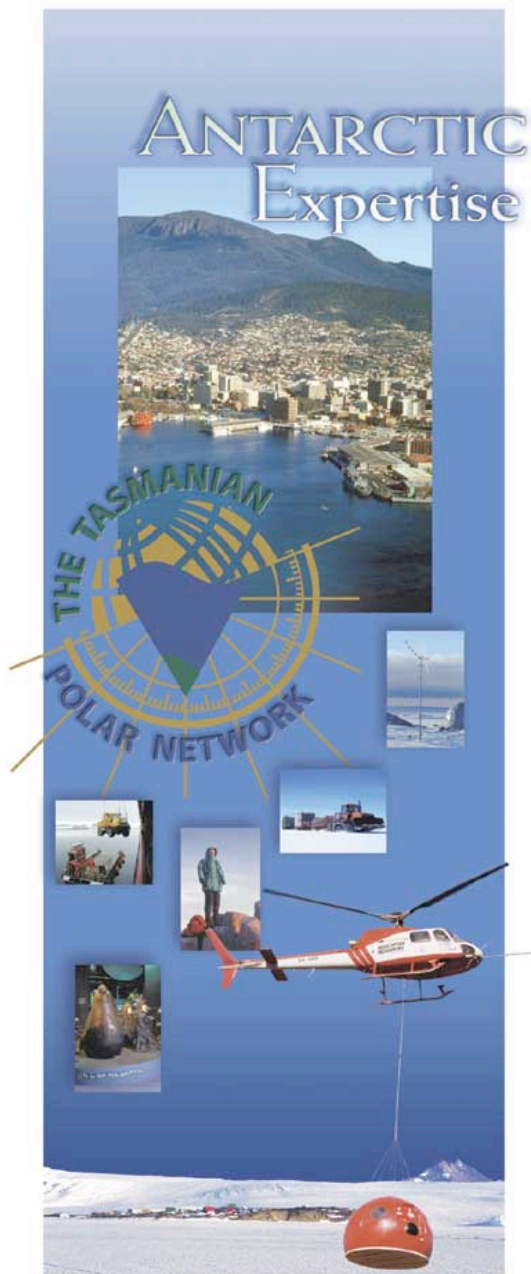


- Most of the expenditure incurred in Tasmania can be attributed to organisations operating within the State such as the Australian Antarctic Division. There are other entities that source their goods and services, as well as labour from Tasmania. This includes foreign Antarctic Programs operating from the State.
- Previous research has shown a steady growth in the Tasmanian Antarctic sector. At the end of 1994-1995, the sector was worth \$82.5 million. Since then it has grown to its current size of \$147.7 million in the 2006-2007 financial year. This represents a total aggregate growth of 79.1%, which corresponds to an average annual growth rate of 6.1%.
- Growth in Tasmanian-sourced goods and services for the Antarctic sector has grown favourably with the growth of the overall Antarctic sector, gaining a market share which is more than 2.5 times its original size in the 1994-1995 financial year. The total aggregate growth of Tasmanian-sourced goods and services during the 13 year period is 162%, which corresponds to an average annual growth rate of 12.5%.
- There has been a large increase in the size of the Australian Antarctic sector since the introduction of the Tasmanian Government's first Antarctic, sub-Antarctic and Southern Ocean Policy in 2001. Up until this time, the growth was averaging at about 3.4% annually. After the policy, the average growth increased to 7.4% annually.
- Expenditure on Antarctic-related wages has increased at a fairly consistent rate over the past five years. The total increase in expenditure on wages during this period corresponds to an average increase of 10.5% per annum.



Appendix 4: Value of Antarctic and Southern Ocean ships using Port of Hobart

- The regional Port of Hobart services bulk commodities and general container cargo, and supports scientific, tourist and maintenance facilities.
- It is also an important port for international and regional ships assessing the Antarctic, subantarctic and Southern Ocean waters.
- Vessel operators and crew members berthing in Hobart contribute to Tasmania's economy by accessing fuelling, provisioning, stevedoring, maintenance, accommodation and recreational services.
- The French Antarctic vessel L'Astrolabe uses Hobart as its home port and gateway to the Antarctic when conducting marine science research and resupply activities to Dumont D'Urville. Typical expenditure by the French Antarctic Program as a consequence of L'Astrolabe using Hobart to resupply Dumont D'Urville station is estimated at \$535 000 per ship visit.
- International fishing vessels, such as the South African vessel, Isla Graciosa, and Spanish vessel, Galaecia, also make a significant economic contribution to the Tasmania economy when they use Hobart as a gateway port to access the Antarctic. In 2003, these vessels conducted exploratory fishing activities in the Ross Sea in accordance with the CCAMLR conservation measures. For each ship visiting Hobart, the approximate expenditure is estimated to be in excess of \$170 000 per visit. Expenditure included fuelling, provisioning, ship maintenance and crew accommodation services.



Appendix 5: Tasmanian Polar Network's Interests

- The TPN's vision is for Hobart to become the pre-eminent international gateway to the Antarctic, Subantarctic and Southern Ocean, and to supply cold climate goods and services throughout the world.
- The TPN's mission is to promote Tasmania as an international centre of excellence for the supply of cold climate goods and services, and as the supplier of choice to operators in cold regions with an emphasis on the Antarctic, Subantarctic and Southern Ocean.
- Each year the international community spends \$US700 million on Antarctic science alone. This expenditure, together with associated investment in logistics and supply for tourist and other operations, represents another major opportunity for competitive local suppliers. The Network is actively targeting international Antarctic Programs to use the Port of Hobart as 'the Gateway to East Antarctica'
- Tasmanian industry is an internationally competitive supplier of many Antarctic goods and services ranging from foodstuffs to environmental engineering expertise. A key component of the Network's efforts to exploit current and emerging business opportunities is to market the State's capabilities to a wide audience of Antarctic and cold climate operators. Often, the fact that Tasmania as a whole can supply a wide range of goods and services will be essential for individual companies to secure individual contracts, necessitating a cooperative marketing approach focused at a general industry level.
- The effective communication and promotion of these natural competitive advantages to targeted national Antarctic programs and organisations is crucial to further development of the Antarctic sector in Tasmania. By actively increasing the number and satisfaction of Antarctic programs and organisations based in Hobart, the Antarctic sector will increase in size, diversity and economic value. With strategic and targeted marketing activities the TPN is ideally positioned to communicate these competitive advantages to potential targets.



Appendix 6: The Tasmanian Polar Network

- The Tasmanian Polar Network is an organisation of more than 60 members drawn from all areas of the Tasmanian Antarctic community including private businesses, educational institutions, research bodies and government agencies.
- Due to its geographic location, Hobart has over 200 years of association with the Antarctic continent. This long association with the Antarctic has enabled the State to develop and attract world class expertise, and many of these experts have formed the TPN.
- The TPN is a central point of contact for all Antarctic business related enquiries.
- The TPN members are able to provide a wide range of specialised goods and services including:
 - Land, air and sea transport
 - Waste management
 - Shipping agents, provisioning and port services
 - Specialist clothing
 - Tourism, accommodation and conference facilities
 - High technology, communication printing and design
 - Engineers and consultants
 - Fuels and gasses
 - Education, research and industry support services
 - Building and other supplies



Appendix 7: The Tasmania Maritime Network

The Tasmania Maritime Network is a group of leading-edge, competitive and sustainable shipbuilding and maritime businesses producing innovative products and services of exceptional quality including

- High speed passenger and vehicle ferries of up to 100m plus
- Ship components and parts
- Marine engineering and metal fabrication services
- Ship refit, repair and maintenance of merchant, fishing, defence and research vessels
- Ship fit outs
- Instrumentation and electronic systems
- Marine evacuation and inflatable rescue systems
- Marine consultancy
- Maritime education and training services
- Provisioning
- Maritime clothing and personal floatation devices

The refit, repair, maintenance, provisioning and supply of maritime services to the sea trade, Antarctic and Southern Ocean, cruise tourism, defence and fishing industries in Port of Hobart makes a significant contribution to the shipbuilding and other maritime industry in southern Tasmania.

Appendix 8: Network Membership

Tasmanian Polar Network members

ACE CRC
Adventure One Pty Ltd
Antarctic Spirit
Antarctic Tasmania
APCO Engineering
Australian Antarctic Division
Australian Bureau of Meteorology
BOC Gases
BP Australia - Marine
Clarence City Council
Colbeck & Gunton (Tas) Pty Ltd
CSIRO Marine & Atmospheric Research Division
Dept of Foreign Affairs & Trade
Doherty Hotels Pty Ltd
Fiomarine Industries Pty Ltd
Helicopter Resources Pty Ltd
Hobart City Council
Hobart International Airport Pty Ltd
IASOS (Inst. Antarctic & S'thern Ocean Studies)
Icewall One
Images of Antarctica
Imbros Pty Ltd
Industry Capability Network Tasmania (ICNTAS)
Irina Gan - Translator / Liaison
John Clennett's Mitre 10
Lester Franks Survey & Geographic Pty Ltd
Marcom-Watson Group
Metocean Services International Pty Ltd
Monson Shipping Pty Ltd
Moonraker Australia Pty Ltd
Nekon Pty Ltd
Ocean Frontiers
Oceania Maritime Services Pty Ltd
OfficeMax Australia Ltd
P&O Maritime Services
Poles Apart
Purdon & Featherstone
Quarantine Tasmania

Quark Expeditions
Royal Tasmanian Botanical Gardens
Saunders & Ward Pty Ltd
Sinclair Knight Merz
Skytraders Pty Ltd
Southern Cross Equipment
Tasmanian Museum & Art Gallery
Tasmanian Ports Corporation
Tasmanian Shipping Supplies
Taylor Bros (Slipway Engineering) PL
The Ice Box
Tony Hughson
Tweezy New Media
Veolia Environmental Services
W. Chung Sing & Co Pty Ltd
William Adams Pty Ltd

Tasmania Maritime Network members

APCO Engineering
Asia Pacific Marine Institute
Austal Ships
Australian Maritime College
CleanLift
Colbeck and Gunton
Institute of TAFE Metal Trades
Fiomarine
Incat Australia
Liferaft Systems Australia
Moonraker Australia
Muir Windlasses Australia
Pivot Maritime
Plastic Fabrications
P&O Maritime Services
Revolution Design
Richardson Devine Marine
Riley Industrial & Marine
Sabre Marine
Stormy Australia
Tasmanian Shipping Supplies
Taylor Brothers