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**SYSTEM PECULIARITIES OF DEVELOPMENT OF NATIONAL
MARITIME TRANSPORTATION INDUSTRY
СИСТЕМНЫЕ ОСОБЕННОСТИ РАЗВИТИЯ НАЦИОНАЛЬНОЙ
МОРСКОЙ ТРАНСПОРТНОЙ ИНДУСТРИИ**

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*Розглянуто систему умов стійкого розвитку національної галузі
орського транспорту. Обґрунтовано принцип формування
конкурентоспроможного потенціалу торговельного флоту. Розкрито
напрямки росту ефективності участі судновласників в світовому ринку
морської торгівлі.*

Analysis of problem condition and publication. System significance of Maritime Transportation Industry within global economic cooperation and from the position of Transportation Independence of National Economy [1] forms a factors system which influences the peculiarities of the chosen priorities achievement. Therefore, the state's Maritime Transportation development requires coordination between institutional and entrepreneurial approaches. Unfortunately, objective characters of availability of both freight capacity reserves and national approach to Ukraine's establishment as a full-fledged state have not been considered in the strategy of the core Ministry.

Operational practice of contrailer (piggyback) train "Viking" is an evidence of the difficulty of achievement of the target financial task – work profitability. It was launched in 2003 but hasn't provided normalized profitability so far despite functional advantages. It's partially due to a lack of traffic frequency to the Baltic States' ports. Recently, Viking reaches only Belarus. At the same time 19 APR – Europe cargo traffic-oriented lines depart from the Baltic States.

The advantages of the train are that goods delivery time between terminal points is 48 hours whereas by highway it is more than 5 days. Besides the Black Sea ranges within activities of the Ukrainian commercial ports are not included into the Priority List of Trans-European Networks (TEN). This example highlights problems of solution of both main economical tasks and achievement of political tasks of meso-economic establishments.

Relationships between state and commercial port departments are still critical. On the one hand, the departments impose considerable limitations on independent commercial activities. On the other hand, the principle of parity of cash flow and project participants' share of capital is not ensured when implementing the collaboration principle. Thus, at one of the ports only 50% of profit is provided when passing 67% of the object's power. Such relationships can be acknowledged optimal neither organizationally nor economically from the point of view of normal business.

A number of publications among which the following are singled out [2, 3, 4] have been devoted to the problem of normalized development of the National Maritime Transportation Industry. Nevertheless, a number of provisions aggravating the gap between global and national Maritime Transportation Industry requires

further research. Thus, inefficiency of organizational forms of Maritime Transportation Business from the macroeconomic viewpoint is singled out.

Research problem statement. Difficulty of the system of national transportation potential increase has been predetermined by a lack of financing of the transportation component of the industrial infrastructure. It is stipulated by the limited budget and entrepreneurial financial resources as well as occasional character of state's participation in state's manufacturing potential transformations. It is not direct cash investments that become main ones but development of their competitive use according to the return criterion on the conditions of legal protection of the resources' owner.

Ukrainian Maritime Transportation Companies should in their turn take into account a degree of probability of severe competition development between traditional routes (through Suez Canal) and a potential possibility of Trans-Siberian transport system use with emphasizing the ports of the Baltic States. It is not only the development of a single tariff policy that becomes fundamental but achievement of technical and economical adequacy to the requirements of the competitive routes in the view of the Ukraine's transitional potential.

It is necessary to take into account a political part which eventually significantly corrects development parameters and results in the management system of National Maritime Transportation Complex development. It is enough to give an example of oil products delivery capacities among which the following projects are singled out Baku – Tbilisi – Ceyhan, Odessa – Brody and terminals' development of the Baltic States aimed at Russian oil export. Despite purposeful concentration of Russia's attention on building their own oil terminals in the Baltic States in American experts' opinions Western customers were more interested in the development of oil-refining capacities in the Baltic States.

Other approaches are formed focusing on commercial competitiveness. Particularly, A. P. Moller-Maersk shipping company has shown interest in investing into Russian ports development on the basis of the relevant concern's offer.

As ferry traffic development experience shows it is important for the Black Sea Basin to have further improvement. Thus, creation of Ferry Shipping in route Illichevsk – Poti – Batumi has predestined implementation of Baku – Aktau project (Kazakhstan). Further increase of ferry shipping capacities taking transshipment into account becomes essential.

Research task and objective statement. Despite the well-known fact of the largest Black Sea Shipping Company breakdown, a totality of factors having formed this process on the one hand, and unsystematic character of the real owner's actions on the other hand are worth paying attention to. Therefore, **the main objective of the article** is search of modern tendencies of efficient positioning of the National Merchant Marine in conditions of severe competitiveness by offering world's operators' freight capacity.

Main material. Further ferry complex development should be considered one of the most competitive transportation projects on the Black Sea besides a ring road. It ensures transportation and economic cooperation between Ukraine and European countries with Transcaucasia, Middle Asia and Turkey. Coordination of capital resources and direct and emergent efficiency management concentration has fundamental importance for the stability of transportation and economic cooperation

in any maritime range. The complexity consists in emitting a synergy part from a general stream of the established value [5] in order to avoid contradictions among main project's participants.

Violation of this principle has practically excluded Odessa ship-repairing industry from the competitive position as for work urgency and quality and further on – the indexes of their value. Dumping prices could not ensure long-term stability due to a lack of innovation technologies financing.

Initiator of development of the National Commercial Shipping potential and State Institutes ensuring main forms of entrepreneurial structures support should take into account a severe appropriateness of steady Marine positioning at the global maritime market of Commerce (E_g).

$$E_g = \sum_{i=1}^{T_r} D_w \mu T_e (p_{cm} - c_{si}) \alpha_{ti} \geq K_p \frac{T_r}{T_L} \leq \sum_{i=1}^{T_n} G_{ni} \alpha_{ti}$$

where T_r – estimated normalized period of an investment project recoupment, years;

D_w – estimated deadweight of the Global Marine ensuring a solution of the set task, t;

μ – average productiveness of the competitive Marine group of the priority specialization, t-m/tonnage – days in operation;

T_e – normalized operational period of the rated vessel, days;

p_{cm} – balanced tariff (freight) rate of the Freight Market spot condition, dol./t-m;

c_{si} – unit cost price of transportation work, dol./t-m;

α_{ti} – discount factor of the current cash flow on conditions of money value change in time;

K_p – principal value of the estimated Marine group, mln. dol.;

T_L – normalized Marine life cycle of the fleet of the chosen specialization, years;

T_n – time of steady positioning according to the criteria of the perceived value in the system of global maritime trade, years;

G_{ni} – estimated annual profit amount formed according to the conditions of marginal ship owners' priorities, mln. dol.

Maritime Transportation potential obtained by Ukraine in due time turned out unnecessary for financial and managerial opportunities of the new state. The country lost a competitive Marine Fleet and ship-building capacities due to actual disregard to real requirements and absence of Maritime Industry development strategy.

World's experience of resources concentration at priority points on the basis of points of increase choice has not been taken into consideration [6]. Leading ship-building enterprises can be pertinent to these points of increase. It is due to this omission of the competitive use of national ship building that the alternative bases of South Korea and China in costs leadership strategies developed. Defining of priorities is based on realization of a country's economic security potential and export technologies. Thus, the choice of the market niche, which by virtue of certain advantages can ensure maritime state' principle of realization, becomes a problem.

Meanwhile, tariff rates can't exceed the limits of standard requirements for compliance with marginal costs [7]. When violating a balanced cash flow, compensating costs, negative deadweight reproduction conditions according to adequacy criteria are formed. This determines transportation feature of local service zones of freight traffic.

Activity of Maritime Transportation state's potential use depends on its compliance with competitive parameters of the Maritime Shipping market and economic and legal conditions of transit freight traffic service by land. There has been formed a negative image of the Ukrainian transit space in this sphere. Only within the first seven years of transit traffic the prices for using Ukrainian highways for foreign companies have been reduced from 200 dollars per 1000 km of the way to 20 euro. That means that originally a principle of forming both a monopolist and dumping price was used.

Due to bad land passageways the competitive character of national commercial ports is reduced and annual transportation cost price as for the freight traffic level increases up to 0.5 bn. dollars. Taking into account motor transport premature deterioration and cargo losses, the damage reaches 0.7 bn. dollars.

Factual removal of the national Marine Fleet from basic freight traffic has had a negative influence on its condition. Work of national vessels at external freight traffic was paid by international rates but revenues practically never reached a legal owner. Besides, the Marine Fleet was repaired at foreign bases, bunkered at international prices which led to further contraction of national service infrastructure and steamship line's loan debt formation.

Strategies' inconsistency carried out in the sphere of its steady positioning on the market of maritime trade should be taken into account in the programs of National Maritime Transportation development. Thus, Germany being a leader of container technologies formation has been reducing ship building volumes in this group since 2001 giving preference to ordering container carriers from shipyards of South Korea. During the pre-crisis period more than 20% of world's orders in the container fleet segment were accounted for Germany. At the same time ship's operation during her life cycle ensures bigger revenue than ship's realization. This should be taken into consideration when implementing Ukraine's establishment strategies in the status of a competitive maritime state.

Integration processes in the functional activities of the Maritime Transportation industry predetermine its resources influence on the state's GNP formation in which a vessel has been registered or the citizens of which work for this company. Thus, the seafarers working for foreign shipping companies bring up to 1.5 bn. dollars of salaries to Ukraine annually. These funds form demand for the products and expansion of social sphere parameters inside the country.

The principle of world's balanced Maritime Industry formation should reflect position differentiation peculiarities in the international division of labour: "... importing country wins from cheap import within short-term period, it starts losing as soon as the company having achieved a monopolist position at the market sets high prices for its import" [8, p. 208]. It is called predatory dumping. Besides, there is also aggressive cyclic dumping.

Therefore competitive opposition and positions expansion of certain regional components are being strengthened. There is an increase in pressure from the side of Asian countries. If in 2005 there worked 122 thousand of the Chinese and 120 thousand of the Pilipino in 2008 these rates grew up to 156 thousand and 130 thousand respectively. The post-crisis fleet's condition in 2011 affected the seafarers' labour market parameters insignificantly.

Conclusion. To avoid economic risks, re-flagging principle of ensuring company's financial stability is widely used in the world's merchant shipping. Progressive character of ships' registration system must be based on a perfect legal base, developed commercial and bank infrastructure.

Competitive pricing from the position of compliance with the quality and technical and economical fleet level predetermines problems for substandard shipping companies. An attempt of price control from the position of local interests gives only temporary advantages for a national segment of maritime transportation. It is the price mechanism of a global maritime trade market that predetermines distribution of freight capacity among shipping enterprises.

Meanwhile, global maritime trade market is regulated not on the basis of dumping. Due to the fact that its main component is non-material services as for a mass of commodities space transportation on the base of attracting and use of a considerable value of fixed and lately human capital.

Seafarers' labour market segment is becoming the most important tool of ensuring stability of shipping companies' functional activities despite the ship's flag registration.

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Аннотация

Системная значимость морской транспортной индустрии в глобальных экономических отношениях и с позиции транспортной независимости национальной экономики формирует систему факторов, влияющих на

особенности достижения выбранных приоритетов. Поэтому развитие морского транспорта страны требует согласования институциональных и предпринимательских подходов. К сожалению, в стратегии профильного министерства не рассматривалась объективность не только наличия резервов провозной способности, но общегосударственного подхода к становлению Украины в качестве полноценной морской державы.

Одним из наиболее конкурентных транспортных проектов на Черном море кроме кольцевой автомобильной дороги следует считать дальнейшее развитие паромного комплекса. Он обеспечивает транспортно-экономические связи Украины и европейских стран с Закавказьем, Средней Азией и Турцией. Принципиальное значение для устойчивости транспортно-экономических связей в любом морском рендже приобретает согласованность концентрации капитальных ресурсов и менеджмента по критериям прямой и эмерджентной эффективности. Сложность заключается в выделении части синергии из общего потока образованной ценности во избежание противоречий среди основных участников проекта.

Нарушение этого принципа фактически исключило одесскую судоремонтную промышленность из состава конкурентной по срочности и качества работ, а впоследствии и по показателям стоимости. Демпинговые цены не могли обеспечить долгосрочную устойчивость вследствие того, что не финансировались инновационные технологии.

Интеграционные процессы в функциональной деятельности морской транспортной индустрии определяют влияние ее ресурсов на формирование ВВП страны, в которой зарегистрировано судно или граждане которой работают в данной компании. Так в Украину моряки, работающие в иностранных судоходных компаний, ежегодно привозят до 1,5 млрд. долларов заработной платы. Эти средства формируют спрос на продукцию и на расширение параметров социальной сферы внутри страны.

Во избежание экономических рисков в мировом торговом судоходстве широко используется принцип рефлагирования в системе обеспечения финансовой устойчивости компании. Прогрессивность системы регистрации судов должна основываться на совершенной правовой базе, развитой коммерческой и банковской инфраструктуре.

Формирование конкурентных цен с позиции соответствия качеству и технико-экономическому уровню флота определяет проблемы для субстандартных судоходных компаний. Попытка ценового регулирования с позиции локальных интересов создает лишь временные преимущества для национального сегмента морского транспорта. Именно ценовой механизм глобального рынка морской торговли определяет распределение провозной способности по судоходным предприятиям.

В то же время глобальный рынок морской торговли регулируется не на основе демпинга. Ибо главными его составляющими является нематериальные услуги по пространственному перемещению товарной массы на базе привлечения и использования значительной стоимости основного и в последнее время человеческого капитала. Сегмент рынка труда моряков становится важнейшим инструментом обеспечения устойчивости функциональной деятельности судоходных компаний, независимо от флага регистрации судов.