



सत्यमेव जयते

Government of Maharashtra



Maharashtra Maritime Board

Transforming The Maharashtra Coastline





Why Maharashtra?

- Largest State in terms of GSDP with CAGR growth of 11.8% between 2011-12 and 2017-18 reaching INR 25 trillion
- Contributes ~15% to India's national income at current prices
- Second largest state in India in terms of population with geographical area of about 3.08 lakh sq. km.
- Highly urbanised with 45.2 per cent people residing in urban areas
- Ranks amongst the top five states in the country in terms of GVA, total output, employment and number of factories
- Attracted cumulative FDI of USD 98 billion between April 2000 and March 2018, representing 31% of the total cumulative FDI inflow in the country
- Futuristic policy framework for industrial & maritime growth

Legend	
○	Major Port
●	Private Ports
●	Captive Jetty



Location Advantage

- 720 km long coastline with extensive network of creeks
- MMB acting as Conservator, Regulator and Facilitator of 48 Non-Major Ports
- Presence of 2 major ports – Jawaharlal Nehru Port and Mumbai Port
- Well Connected through 18 National Highways; 5,984 kms of railway network and airports
- Robust Hinterland connectivity



About Maharashtra Maritime Board

- Constituted in 1996 to conserve, regulate, administer and manage the Non – Major Ports of Maharashtra
- Development of Non Major Ports and Harbors for promoting cargo movement
- Responsible for Regulation and Promotion of Passenger water transport and watersports

Vision

“To be a highly effective, proficient, accountable and progressive maritime agency that is committed to position Maharashtra as a leading state in terms of maritime activity”

Mission

Accelerate integrated development of Maharashtra coastline by facilitating business friendly environment and port conservation through futuristic policies and innovative port regulatory systems.

Objectives

To be a facilitator for the Maritime Sector

- Provide infrastructure support and services to all marine-related activities
- Fast tracking clearances
- Enhancing revenues to sustain and increase the ambit of its activities
- Enhancing skillsets of people employed in the maritime sector

Promote Maritime Infrastructure Development

- Developing green field / brownfield ports through public private partnerships (PPP)
- Developing shipyards / jetties
- Creating a conducive policy environment for increasing private sector investments
- Enhancing overall port connectivity through expansion of rail / road / inland waterways / coastal shipping services
- Encouraging passenger and cargo transport via inland waterways / coastal shipping

Encourage Port-led Industrial and Economic Development

- Developing port-based special economic zones (SEZs) / industrial estates and corridors
- Creating a conducive policy environment for maritime industries
- Creating synergies between tourism and maritime activities





MMB's Major Milestones

1996

**Formation of
Maharashtra
Maritime Board**

1996

**Announcement
of the
Port Policy for
Maharashtra**

2000

**Reforms in Port
Policy**

2002

**Concession
Agreements for
Dighi Port and
Rewas Aware
Port**

2006

**Concession
Agreement for
JSW
Jaigad Port**

2008

**Concession
Agreements
for Angre
and
Vijaydurga Ports**

2009

**Commissioning
of JSW
Jaigad Port**

2010

**Revision of
Port Policy**

2011

**Commissioning
of
Dighi Port**

2012

**Commissioning
of
Angre Port**

2015

**Water
Sports Policy**

2015

**Concession
Agreement for
Jaigad-Digni
Rail connectivity**

2016

**Maharashtra
Maritime
Development
Policy**

2018

**Inauguration of
India's First
LNG FSRU
Project**



Salient Features

-  **Handholding private sector in undertaking maritime projects**
-  **Cross-sector coverage in maritime policy and adequate integration**
-  **Ensuring transparency and fairness in awarding projects**
-  **Enhancing the viability of projects awarded**
-  **Synchronizing maritime and industrial development**
-  **Developing connectivity infrastructure**
-  **Adapting policies to changing external environment**

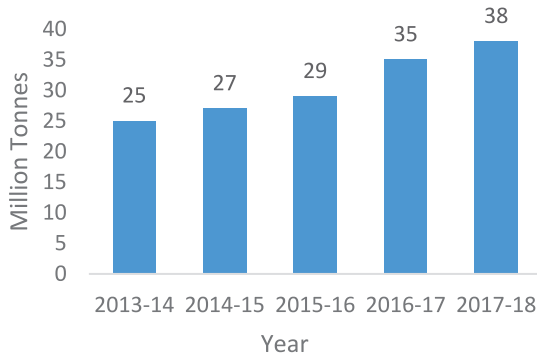




Maharashtra Ports Scenario

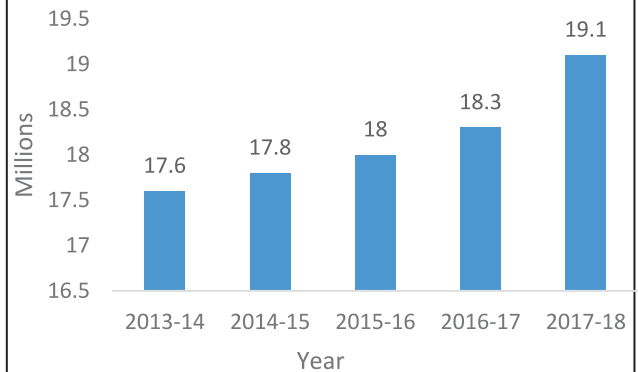
Cargo handling trend of Non-Major Ports (in MMT)

Year Wise Cargo Trend of Non - Major Ports in Maharashtra

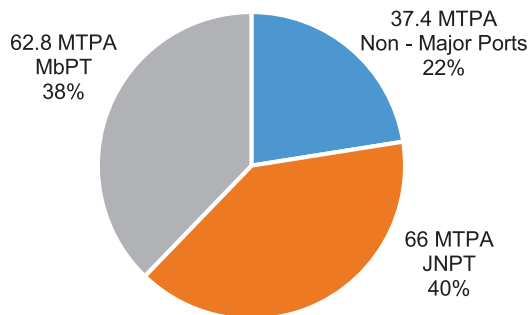


Passenger Traffic at Non-Major Ports (in millions)

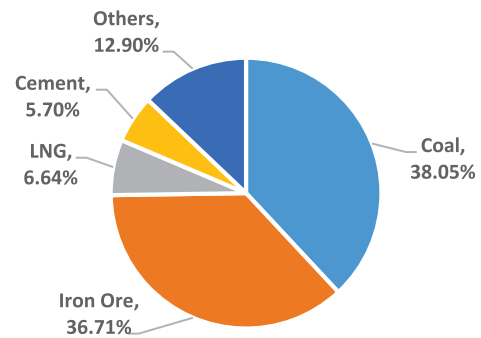
Year wise Passenger Traffic



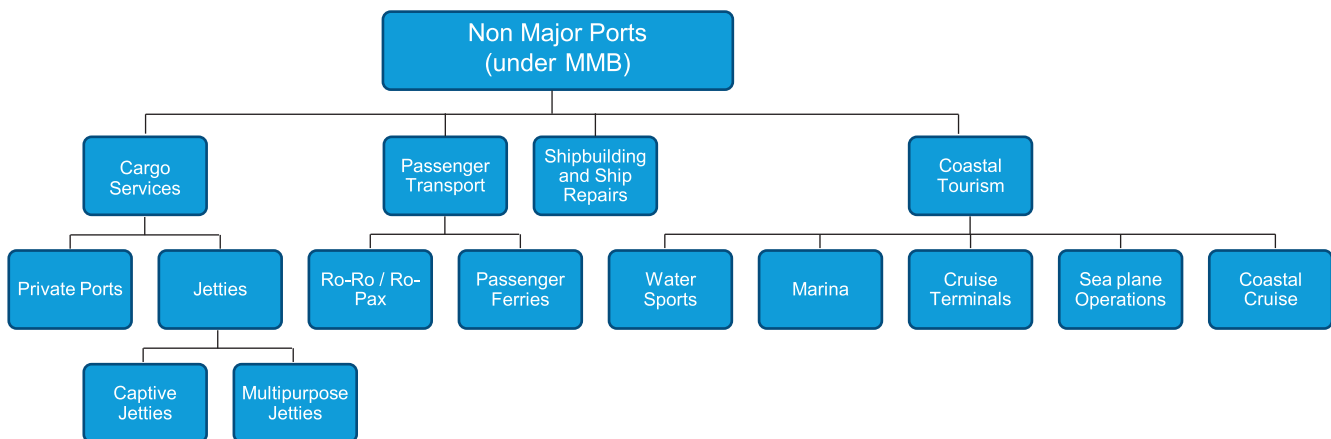
Break up of cargo handled during 2017-18



Break-up of commodities handled by Non-Major ports for 2017-18



Maharashtra Non-Major Ports Classification

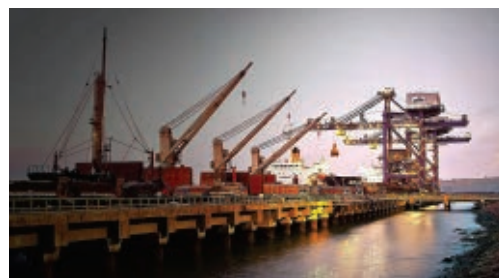




Greenfield Ports

Salient Features

Features	Details
Project Structure	PPP – Full service or Landlord Port
Project Feasibility Study	MMB and / or Project Developer
Environment Clearance	MMB to obtain approval of proposed TOR for EIA report on best effort basis
Project Land Acquisition	<ul style="list-style-type: none"> ■ Government Land – MMB ■ ITZ Land – MMB ■ Private Land – Developer (Provision of MMB to acquire)
Concession Period	35 years
Equity Participation by MMB	Upto 49% - on MMB discretion
Viability Enhancement	Declaration of Port Exclusivity Zone
Sub – Concession	Yes
Tariff Setting Freedom	Full
Operational Freedom	Full



Current Greenfield Ports along the coastline

Operational

Ports	Name of the Developer	Details
JSW Jaigad Port (Dhamankhol Bay)	Jindal Group	<ul style="list-style-type: none"> ■ 19.5 m depth ■ Capacity to handle 120,000 DWT vessels ■ LNG FSRU Terminal
Angre Port, Jaigad (Ratnagiri)	Chowgule Group	<ul style="list-style-type: none"> ■ 13 m depth ■ 700 m quay length ■ State-of-the-art Ship repair facility with Ship Lift System
Dighi Port, Raigad	Balaji Group	<ul style="list-style-type: none"> ■ 8 m depth ■ 3 operational berths ■ 650 m quay length

Proposed / Upcoming

Vadhavan Port, Palghar	Bhandarvadi Port, Ratnagiri	Padvane Port, Sindhudurg
Redi Port, Sindhudurg	Vijaydurg Port, Sindhudurg	

Last Mile Connectivity to Ports

Ports	Road	Rail
Jaigad (Dhamankhol)	Well connected with SH 106	Jaigad – Digni Rail Connectivity (34 kms) with Konkan railway
Dighi	Well connected with SH 92, 96 and 97	Dighi – Roha Rail connectivity (45 kms) with RVNL



Incentives

Upfront 100% Exemptions on :

- Royalty Charges on minor minerals
- Non – agricultural assessment charges
- Port Dues

100% Exemptions on :

- Electricity Duty
- Stamp Duty

Concessional Power Tariff at Industrial rates

Port Exclusivity Zone



Salient Features

Features	Details
Project Structure	PPP
Eligible Industries	Mining Industry and Industries classified under secondary sectors having manufacturing facilities / production units dependent on port facilities
Location	<ul style="list-style-type: none"> ■ Within Konkan Region of Maharashtra ■ Not overlapping Port exclusivity Zone
Selection	Nomination basis
Concession Period	Concurrent to the industry to which it is awarded
Operational Freedom	Full
Handling Third Party Cargo	Allowed upto a maximum of 25% of the total cargo handled by the captive jetty in a year



Current Captive Jetties along the coastline

Captive Jetty	District	Types of Cargo Handled	Cargo Handled in FY 2017-18
Ambuja Cements	Thane	Cement, Clinker	1.6 MTPA
JSW Dharamtar	Raigad	Iron Ore, Coal, Cement, Clinker	11.7 MTPA
JSW Salav	Raigad	Iron Ore, Iron Products	0.6 MTPA
Finlolex- Liquid jetty	Ratnagiri	VCM, Ethylene, EDC	0.4 MTPA
Finlolex- Coal jetty	Ratnagiri	EDC, Coal	0.3 MTPA
RGPPL	Ratnagiri	LNG	2.5 MTPA
Infrastructure Logistics	Ratnagiri	Bauxite	0.2 MTPA





Multipurpose & MMB Owned Jetties Coastal Shipping

Multipurpose Jetties

Salient Features	
Features	Details
Project Structure	PPP
Purpose	For handling non-Exim cargo and passengers through small boats, barges etc.
Type	Greenfield / Satellite
Selection Criteria Greenfield port.	1. Greenfield multipurpose jetties to be established following the similar process as for 2. Nomination basis for establishing satellite multipurpose jetty in the vicinity of an existing port.
Development Process	Similar to that of Greenfield port.

Operational Multipurpose Jetties		
Port & Location	Developer	Cargo Handled (FY 2017-18)
Dharamatar, Raigad	PNP Maritime Services	Commodities: Coal, Sulphur, Bauxite, Cement, Clinker, Rock Phosphate, Steel Coil, HRS Plate Quantity: 3.20 million tons
Revdanda, Raigad	Indo Energy	Commodities: Coal Quantity: 1.40 million tons

Proposed	Port & Location	Developer
Multipurpose Jetties	Yogayatan, Thane creek	Yogayatan Group
	Karanja, Raigad	SKIL Infrastructure

MMB Owned Jetties

Salient Features	
Features	Details
Project Structure	MMB Owned
Selection Criteria	Through competitive bidding process for captive purposes
Allotment	Existing and upcoming mining industries and industries classified under secondary sectors located in Maharashtra
Concession Period	15 Years
Existing Jetties Operated by Private Parties	1. Ultratech Cement (Ratnagiri) – Cement Clinker 2. Reliance Infrastructure (Dahanu) – Coal 3. Ashapura Minechem (Kelshi, Ratnagiri)-Bauxite 4. Integrated Point Services (Vijaydurg)-Molases

Coastal Shipping for Cargo & Passengers

Salient Features	
Features	Details
Status	Second highest cargo volume shipped through the coastal route amongst Indian States
Various Measures	1. Development of dedicated infrastructure such as multipurpose jetties for handling non-Exim cargo and passengers 2. Extending the limits for inland waters beyond base-line/ territorial waters to facilitate the coastal / river-sea vessel movement 3. Steps to lower manning scales for coastal ships 4. Identification of potential sites for catamaran / hovercraft / Ro-Ro / ferry services

Fiscal Incentives	
One port one charge:	
<ul style="list-style-type: none"> ● Exemption of wharfage charges on imported cargo for further transshipment through coastal shipping within Maharashtra ● Wharfage charged only while loading for transportation of goods within Maharashtra through coastal shipping 	
20% rebate in wharfage charges for goods transported between non-major ports within Maharashtra	
15% rebate in wharfage charges for goods transported from non-major port of Maharashtra to other Indian port	



Salient Features

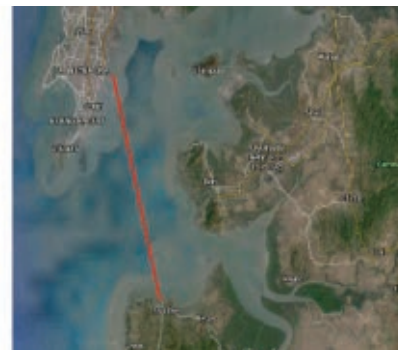
Features	Details
Project Structure	PPP
Identification of Locations	MMB and / or Project Developer
Selection Procedure	<ul style="list-style-type: none">■ Solicited Proposals (Competitive Bidding)■ Unsolicited Proposals (SWISS Challenge)
Land Acquisition	MMB and / or Project Developer
Concession Period	10 years + 10 years extendable on mutual basis
Incentives	<ul style="list-style-type: none">■ 100% exemption on Stamp duty and Registration charges■ Applicability of Industrial Power Tariff■ 100% exemption on Electrical Duty



Passenger Water Transport

Ro-Ro Ferry Service Project under Execution: Ferry Wharf to Mandwa

- Road Distance – 109 kms
- Waterway – 18.52 kms
- 40 PCUs (Passenger Car Unit) and about 300 passengers
- Beneficial for ~14 lakh passengers travelling between Gateway of India and Mandwa annually
- Infrastructure development at Mandwa completed
- Selection of Ferry Operator underway



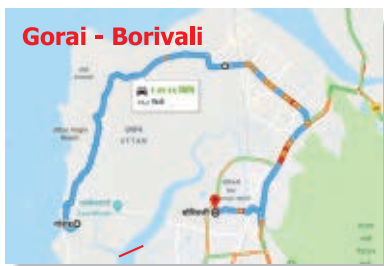
Marine Infrastructure



Terminal Building

Upcoming Ro-Ro Ferry Projects : Improving Connectivity

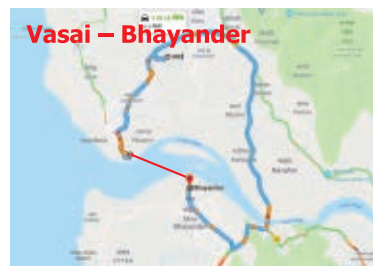
Locations	Advantages	
Gorai - Borivali	■ Road distance - 26 kms	■ Waterway - 0.5 kms
Narangi – Khawadeshwari	■ Road Distance - 60 kms	■ Waterway - 1.7 kms
Vasai – Bhayander	■ Road Distance - 30 kms	■ Waterways - 3.5 km
Marve – Manori	■ Road distance - 37 kms;	■ Waterway - 0.45 kms
Ghodbunder – Vasai	■ Road distance - 42 kms	■ Waterway - 10 kms
Malwan	■ Connecting Malwan to Sindhudurg Fort	■ Useful for ~ 6 lakh passengers



Gorai - Borivali



Narangi-Khawadeshwari



Vasai – Bhayander



Marve – Manori



Ghodbunder – Vasai



Malwan – Sindhudurg

— Water route — Land route



Water Transportation

Coastal Cruise Tourism

Konkan Area coastal cruise tourism project to promote tourism activity and local employment generation.

- Route 1 – Ferry Wharf to Kashid
- Route 2 – Ferry Wharf to Goa (via Ratnagiri & Malvan)

Concession Period: 30 Years

Probable Locations:

- Dabhol
- Jaigad
- Ratnagiri
- Vijaydurg
- Malvan



Mumbai West Coast Passenger Transport

- Project involves development of ferry terminals and deployment of catamaran vessels
- Identified sites:
 - Nariman Point
 - Bandra
 - Juhu
 - Versova
 - Marve
 - Borivali

Inland Waterways

14 Declared National Waterways in Maharashtra

- 5 Waterways to be taken up on priority basis
 - NW 10 - Amba River
 - NW 28 - Dabhol creek - Vashishti River
 - NW 53 – Vasai – Thane – Kalyan
 - NW 85 - Revdanda creek & Kundalika River
 - NW 89 - Savitri River & Bankot creek



Areas of Opportunities:

- Ownership and Operation of vessels for cargo and Passengers
 - Construction of Terminals
 - Provision and Operation of Mechanized cargo handling systems
 - Setting up and maintenance of Navigational aids
 - Provision of Pilotage services
- Mix of Budgetary Support, Multilateral funding, or Debt and internal accrual of MMB

Modern Infrastructure

Marinas

Marina at Belapur -

- Capacity of 50 boats – biggest in India
- To be second marina in India
- To be operational by December 2019

Other Marina Project approved at Mandwa



Pictorial Representation



Floatels

- Luxury floating hotels with 3 decks
- Located at MMB jetty at Bandra
- Total Capacity of about 600 guests





Maharashtra : Abundance of Maritime Opportunities



OPPORTUNITIES

- | | |
|--|---|
| 1. Greenfield Ports <ul style="list-style-type: none"> ■ Landlord / Service Port ■ Sub-concession to existing Ports | 7. Coastal Tourism <ul style="list-style-type: none"> ■ Water Sports ■ Seaplanes / Hovercrafts ■ Marinas ■ Floatels ■ Ancillary Industries ■ Coastal Cruise |
| 2. Captive Jetties | 8. Connectivity - Road, Rail, Inland Waterways |
| 3. Multipurpose Jetties | 9. Port based SEZs / FTWZ |
| 4. Inland Water Transport <ul style="list-style-type: none"> ■ Ro-Ro / Ro-Pax Ferry Services ■ Passenger Ferries | 10. Logistics Services |
| 5. Coastal Shipping | 11. Surveys & Investigations |
| 6. Shipbuilding & Ship Repairs <ul style="list-style-type: none"> ■ Shipyards ■ Shipbuilding Skill Development Centers ■ Ship equipment and machinery suppliers | 12. Dredging |
| | 13. Maritime Education |



Maharashtra Maritime Board

Stakeholders of MMB



Finolex





Maharashtra Maritime Board



Maharashtra Maritime Board

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