

THE FEDERATION OF
NATIONAL ASSOCIATIONS OF SHIP
BROKERS AND AGENTS



FONASBA



FONASBA

**ANNUAL
REPORT
2004/5**

*Cover Photograph:
The Chain Bridge in Budapest, Hungary, host city for the 2004 FONASBA Annual Meeting*

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INTRODUCTION
By the President of FONASBA
Philip J. Wood FICS



It is with great pleasure that I am able to present to you the first FONASBA Annual Report, which is a summary of the activities undertaken by FONASBA, its committees and, equally of our members around the world.

During the past year we have come to realise that the external profile of the agency and broking community is low and, to a significant degree, the vital work undertaken by our members in ensuring the efficient flow of cargo around the world is overlooked. This lack of recognition applies to a greater or lesser degree across the entire shipping industry. One only has to look at the very high profile efforts being made by the International Maritime Organisation to generate awareness and public interest in the transport of goods by sea to realise that not enough people are aware of how goods move from producer to consumer.

In our own sector, the lack of wider appreciation is even more pronounced. If you cannot generate any interest in something as large and technically impressive as a 6,000 TEU container vessel or a 250,000 tonne deadweight oil tanker, what hope is there for the agent, just one individual scuttling almost unnoticed from ship to office and back again, or the broker toiling away in his office, often many miles from the nearest port? We must, however, redress this balance and ensure that those in authority, from local port bodies through national governments to international organisations such as IMO and the European Commission, are aware that agents and brokers provide a vital, highly professional and extremely committed service, without which international trade would grind to a halt very quickly.

This annual report is part of a concerted effort to make our presence felt, to ensure that the work of our members is given due recognition and receives a level of remuneration appropriate to the quality of the very professional service provided. It is time, as "Fairplay" magazine said in July, for agents and brokers to start to shout about what they do and how they do it.

I am confident that I will be able to write in next year's report that we have made significant strides in achieving our aims but I do not underestimate the size of the task. I am confident, however, that with the support of our members we will make excellent progress.

THE YEAR IN PERSPECTIVE
Jonathan C. Williams, FICS
General Manager



I am pleased to be in a position to report that 2004/5 has been a year of continued development and growth in all areas. The following pages include more detailed reports on the activities undertaken by our committees and membership but I can summarise some of the main points as follows:

Early in the year we welcomed the Romanian Ship Agents and Ship Brokers Association into full membership and in June 2005 our long-standing associate member in Bulgaria, the Bulgarian Association of Shipbrokers and Agents (BASBA), was promoted to full membership. The decision to appoint four regional Vice-Presidents is bearing fruit through a much greater awareness of the aims and objectives of the Federation worldwide, and in particular in Latin America. CIANAM, the Inter-American Chamber of National Agents Associations which functions as the regional committee of FONASBA, has made excellent progress. As a result of the support given by CIANAM, the Uruguayan association, Centro de Navegacion, joined FONASBA earlier this year as our first Candidate Member. A number of other associations in South America have indicated their interest in joining CIANAM and we hope these will ultimately join FONASBA as well. Although new membership interest in Africa and the Far East is proving somewhat more difficult to achieve, the profile of FONASBA is already much higher than it has been in the past. We hope that the 2005 Annual Meeting in Tokyo will give our efforts in the Far East the same boost as our 2002 meeting in Rio de Janeiro did in Latin America.

The increasing burdens of financial and operational responsibility falling on intermediaries in the shipping industry are driving the need for agents and brokers to be able to provide tangible evidence of professional standards of competence and FONASBA is fully committed to supporting its members in this regard. This year our members in the USA, the Association of Ship Brokers and Agents (USA) Inc., introduced — and impressively completed ahead of schedule — a certification programme for all its members, who collectively cover approximately 50% of all vessel calls in US ports. The programme required all ASBA agent members to meet specified criteria for financial probity, staff training and insurance coverage. In another direction, our members in Morocco were instrumental in the organisation and presentation of a series of local seminars to provide training and guidance on the implementation of the ISPS Code in Moroccan ports.

FONASBA continues to raise its profile in the international shipping industry, in order to ensure the vital roles played by the agent and broker in the efficient and safe movement of goods on a global basis receive the credit they deserve. Through close and regular contact with European institutions, ECASBA has ensured that it is in the “premier league” of organisations consulted by the Commission and FONASBA regularly consults with major industry organisations such as BIMCO and Intertanko and is in the preliminary stages of making an application for consultative status with IMO. On a national basis, member associations are also encouraged to develop close relationships with their own national regulators and related industry organisations.

The significant advances made by the Federation in 2004/5 will form the basis for further advances and I hope to be able to report on even greater progress on all fronts in the next Annual Report.



FONASBA MEMBERSHIP BY COUNTRY (at June 2005)

(E indicates member of ECASBA, A indicates Associate Member,
C indicates Club member and Cand. indicates Candidate Member)

AFRICA

Kenya	The Kenya Ship's Agents Association, MOMBASA
Morocco	APRAM, Casablanca
Senegal (A)	Thocomar Shipping Agency, DAKAR
South Africa	ASABOSA, DURBAN

ASIA

China	Taiwan Association of Shipping Agents, TAIPEI
Japan	JAFSA, TOKYO
Vietnam	VISABA, HO CHI MINH CITY

EUROPE

Belgium (E)	NAVES vzw, ANTWERP
Bulgaria (E)	BASBA, VARNA
Bulgaria (A)	TNS Shipping & Forwarding, BOURGAS
Croatia (E)	The Association of Maritime Agents of Croatia, RIJEKA
Cyprus (E)	The Cyprus Shipping Association, LIMASSOL
Denmark (E)	The Danish Shipbrokers Association, Copenhagen
Finland (E)	The Finnish Shipbrokers Association, HELSINKI
France (E)	COFRALI, PARIS
Germany (E)	Zentralverband Deutsche Schiffsmakler e.V, HAMBURG
Great Britain (E)	The Institute of Chartered Shipbrokers, LONDON
Great Britain (C)	The Baltic Exchange, LONDON
Great Britain (C)	ITIC, LONDON
Greece (E)	The Hellenic Federation of Agents & Brokers, PIRAEUS
Hungary (E)	The Hungarian Shipbrokers & Shipping Agents Association, BUDAPEST
Iceland (A)	Mrs. T.K. Halldórsdóttir, hdl, REYKJAVIK
Ireland (E)	The Irish Ships Agents Association, COBH
Italy (E)	FEDERAGENTI, ROME
Lithuania (E)	The Lithuanian Shipbrokers & Agents Association, KLAIPEDA
Malta (A)	The Association of Ships Agents, VALETTA
Montenegro (A)	JADROAGENT, BAR
Netherlands (E)	ORAM, AMSTERDAM, VRC, ROTTERDAM
Norway (E)	The Norwegian Shipbrokers Association, OSLO
Norway (C)	INTERTANKO, OSLO



FONASBA MEMBERSHIP BY COUNTRY (at June 2005)

(E indicates member of ECASBA, A indicates Associate Member,
C indicates Club member and Cand. indicates Candidate Member)

EUROPE, contd..

Poland (E)	The Polish Shipbrokers Association, GDYNIA
Portugal (E)	AGEPOR, LISBON
Romania (E)	Asociatia Agentilor Si Brokerilor de Nave di Romania, CONSTANTA
Russia	ARMA, MOSCOW Association of St. Petersburg Shipping Agencies, ST. PETERSBURG
Slovenia (E)	The Slovenian Ship & Freight Agents Association, KOPER
Spain (E)	ANESCO, MADRID
Sweden (E)	The Swedish Shipbrokers Association, GOTHENBURG
Sweden (C)	The Shipbrokers Register, LANDSKRONA
Turkey	Istanbul & Marmara, Aegean, Mediterranean, Black Sea Regions Chamber of Shipping, ISTANBUL
Ukraine (A)	INFLOT, ODESSA

MIDDLE EAST

Dubai	The Dubai Shipping Agents Association, DUBAI
Israel	The Chamber of Shipping of Israel, HAIFA
Yemen (A)	Middle East Shipping Co. Ltd. HODDEIDAH

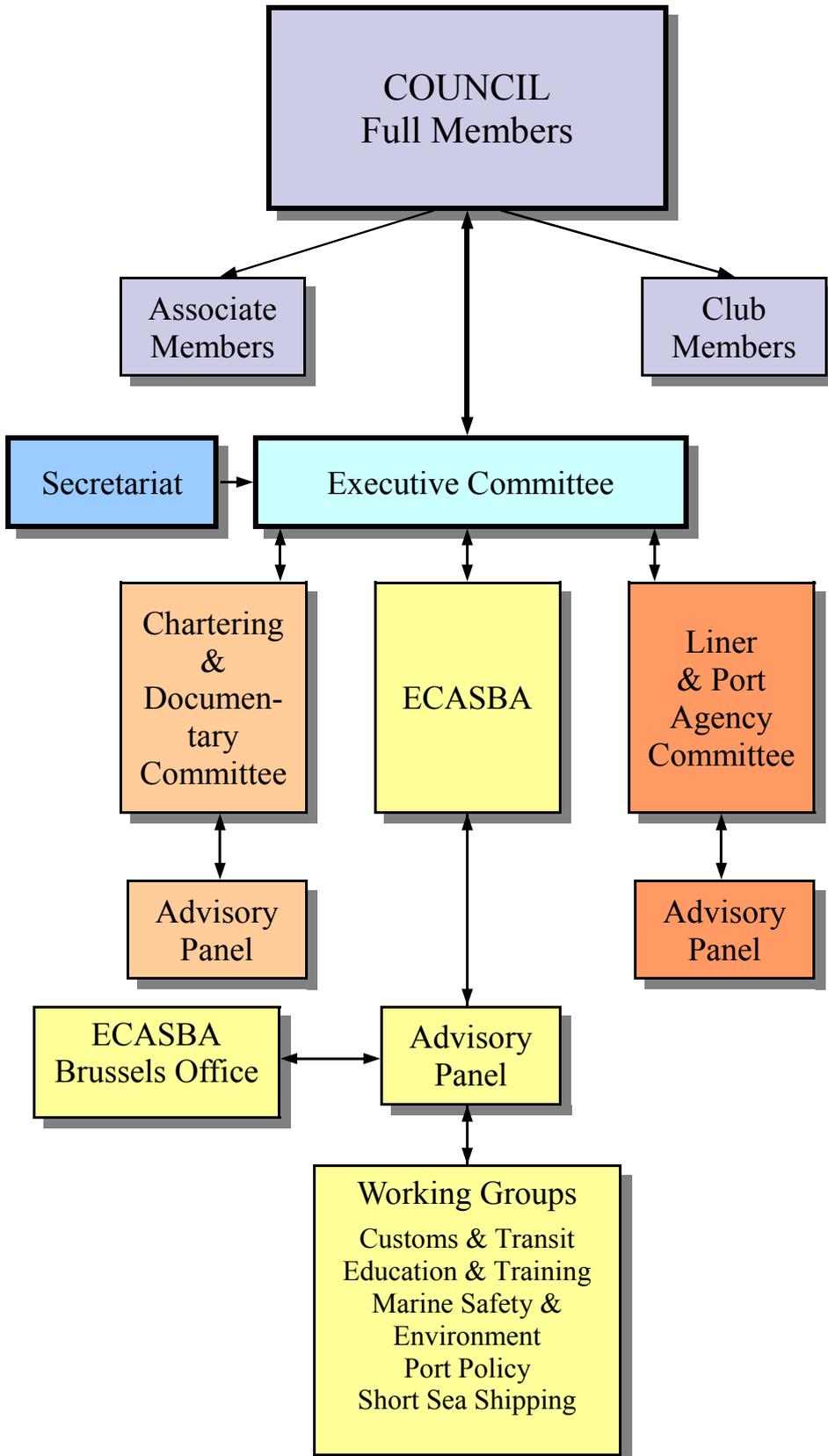
SOUTH AMERICA

Argentina	Centro de Navegación, BUENOS AIRES
Brazil	FENAMAR, SANTOS
Uruguay (Cand.)	Centro de Navegación, MONTEVIDEO

NORTH AMERICA

Mexico	AMANAC, MEXICO CITY
USA	The Association of Ship Brokers & Agents (USA) Inc., ENGLEWOOD CLIFFS

THE STRUCTURE OF FONASBA



FONASBA’s primary decision making body is the Council, which consists of representatives of all the Full Members. Each country represented has one vote, that vote being shared if there is more than one association in a particular country. The Council meets at the Annual Meeting, which is held in October in the country of domicile of a Full Member. Associate and Club Members enjoy all the benefits of Full Membership but they do not have a vote

The Executive Committee is nominated every two years by Council and is responsible to Council for the management of the Federation

Operationally, FONASBA is organised into three committees, each covering a specific sector of the agency and broking industry.

Each committee is supported by an Advisory Panel comprised of senior people with direct and relevant experience of the issues covered by the Committee.

The ECASBA Advisory Panel is further supported by an office in Brussels and a number of Working Groups which bring additional expertise and knowledge to assist the Panel Members.

The London based Secretariat is responsible for all aspects of the administration of FONASBA. Further support and input on European issues is provided by a representative office in Brussels.

THE FONASBA EXECUTIVE COMMITTEE 2004/6**PRESIDENT**

Philip J. Wood FICS, Great Britain

EXECUTIVE VICE-PRESIDENT

Chris P. Papavassiliou, Cyprus

PRESIDENT DESIGNATE

Mario J.L. Froio, Brazil

IMMEDIATE PAST PRESIDENT

Umberto Masucci, Italy

VICE PRESIDENTS

Africa: Aziz Mantrach, Morocco

Americas: Patricio Campbell, Argentina

Asia: Takazo Iigaki, Japan

Europe: Charles Génibrel, France

COMMITTEE CHAIRMEN

Chartering & Documentary: Grete C. Noer, Norway

ECASBA: Gunnar J. Heinonen, Finland

Liner & Port Agency: John A. Good FICS, Great Britain

COMMITTEE VICE-CHAIRMEN

Chartering & Documentary: Paul G.D. Smith FICS, Great Britain

ECASBA: Klaus Bültjer, Germany

Liner & Port Agency: Menno S.B. Duin, The Netherlands

The President is elected by Council to serve a two year term. Members of the Executive Committee also serve for a two year period but may be re-elected if the Council so wishes.

THE FONASBA CODE OF CONDUCT

Since its establishment in 1969, FONASBA has required its members to maintain the highest standards of professionalism and integrity through compliance with its Code of Conduct, as follows:

PREAMBLE

WHEREAS

1. FONASBA has as one of its primary objectives the promotion among its members of a fair and equitable practice of the professions of ship broker and agent,
2. FONASBA is urging all national associations to achieve and maintain the highest professional standards, encourages any association wishing to do so to avail itself of the possibility of seeking official approval of its government,
3. FONASBA has for that purpose laid down the following Code of Conduct:

GENERAL

Members will at all times:

1. act in accordance with all national laws and other regulations of the countries in which they operate,
2. adhere strictly to the principles of honesty and integrity,
3. operate in a sound and honourable financial manner,
4. ensure that all the principal's business being handled is dealt with in confidence,
5. co-operate with and contribute to the efforts of the appropriate authorities to combat maritime fraud,
6. agree to complete wherever possible memoranda of understanding (M.O.U.) with national customs and other appropriate authorities, so as to assist in the halting of illegal trade in banned drugs.

STAFF PROFESSIONAL QUALIFICATIONS SHIPS' AGENTS AND SHIPBROKERS

Members will:

1. employ experienced professionally qualified staff to cover all aspects of the business being undertaken, so as to ensure the proper performance of all the functions of ship agent and shipbroker,
2. encourage such staff to improve its professional capacity qualifications by assisting it to study and pass examinations based on the syllabi of recognised international shipping authorities/educational institutions.

PROFESSIONAL CONDUCT SHIPS' AGENTS AND SHIPBROKERS

Members will:

1. ensure that all activities are carried out honestly within the highest standards of professional integrity,
2. by proper management control, create and maintain a high standard of confidence that all duties will be performed in a conscientious and diligent manner,
3. observe all national and international laws and any local regulations appertaining to the shipping industry,
4. operate from a permanent address with all the necessary facilities and equipment to conduct business in an efficient and timely manner,
5. take great care to avoid any misrepresentation and ensure that all activities are subject to the principles of honesty and fair dealing,

THE FONASBA CODE OF CONDUCT contd./...

6. ensure that for all dealings, the necessary authority is held from the proper party and that no action will be taken which knowingly exceeds that authority,
7. ensure that brokers, acting for an owner, shall only offer firm a vessel for any one cargo at any one time,
8. ensure that charterers' brokers will only make firm bids of a cargo or cargoes to one vessel or one shipowners' broker at any one time,
9. ensure that a vessel or cargo will not, in any circumstance, be quoted unless duly authorised by a principal,
10. ensure that all business enquiries are bona fide by making all reasonable enquiries before placing them on the market.

CORPORATE RESPONSIBILITY

Members will encourage key personnel to:

1. develop strong professional relationships with all customers and principals,
2. accept responsibility and accountability,
3. ensure a good and safe working environment for all concerned,
4. establish a stable business environment to ensure that all costs are economically based and provide a reliable service to clients.

FINANCIAL STABILITY

Members will:

1. recognise the prime importance of protecting and safeguarding all principal's funds and take all reasonable steps necessary to achieve this objective,
2. have adequate financial means to perform the company's activity,
3. arrange a detailed annual audit by established and qualified accountants,
4. undertake to maintain all accounts in accordance with the legal requirements within the jurisdiction of their appropriate legal authorities,
5. maintain adequate liability insurance cover in respect of errors and omissions with an internationally recognised mutual club or insurance company.

DISCIPLINE

Each national association will:

1. recommend to its members, unless such is in conflict with any official regulation, the desirability of accepting self-regulatory control by agreeing to adhere to FONASBA's Code of Conduct,
2. have its own established disciplinary procedures to investigate breaches of the Code and to take such measures as may be necessary against offenders.

***TURNING BACK THE TIDE — A
YEAR OF SUSTAINED ACTIVITY
IN EUROPE***

***Gunnar J. Heinonen,
ECASBA Chairman***



The European Commission continues to dominate international maritime policy-making with the result that FONASBA's European committee, ECASBA, (the European Community Association of Ship Brokers and Agents), has been kept extremely active in ensuring that the views of its members are promoted, and their interests protected, in the European context. As a matter of policy, ECASBA believes that the European Commission should confine its role to the provision of the appropriate legal and fiscal framework under which industry, correctly constrained by existing European law, can develop the commercial solutions necessary to ensure that the maritime industry operates at maximum efficiency. Regrettably, this view is not shared by the Commission and so our industry continues to be the subject of much interventionist activity.

The revival of the Port Services Directive proposal in October 2004 has forced ECASBA and other industry organisations in the port services sector to revisit and refine the arguments that led to the downfall of the original proposal in the European Parliament. ECASBA's view is that of its own volition the European port industry has, in the period since the Port Services Directive proposal was first mooted, made significant strides in allowing increased competition and so does not believe that the case for reviving the Directive has been proven. Undoubtedly there are a few ports in the European Union where competition is severely restricted, or non-existent but ECASBA believes that these could be tackled using existing competition law. With the Commission having confirmed its intention to force the Directive through, ECASBA has maintained close contact with the Commission and the Tourism and Transport Committee of the European Parliament, both individually and in concert with other industry groups, to ensure that the Directive is appropriate, relevant and above all recognises the significant diversity in the ownership, structure and operation of Community ports. ECASBA has also expressed its concerns at the failure to undertake a complete review of the provision of state and regional aid to ports, which we believe is the single most important factor preventing open competition in the port industry.

Recognising the importance of short sea shipping to its members and to the economy of Europe as a whole, ECASBA remains a very strong supporter of the development of coastal shipping services and its members are represented on most of the short sea promotion bureaux. At Commission level, ECASBA has taken every opportunity to express its support for the concept. ECASBA members made a significant contribution to the Commission's original Customs bottleneck survey and has encouraged its members to review the bottlenecks identified in the initial survey and to notify the Commission of any amendments or deletions. Significant progress has been made in removing bottlenecks and most of those which remain relate to Customs procedures, the prime example being the significant difference between the documentary compliance requirements for a cargo moving within the Community by sea compared to a similar journey by road or rail. ECASBA has on numerous occasions called on the Commission to level the playing field in this respect.

In accordance with its policy on Commission intervention in commercial matters, ECASBA has expressed strong opposition to the proposal to introduce the European Intermodal Loading Unit. It is our view that if there is a commercially viable need for such a unit, the industry will develop it. Furthermore, in order to ensure widespread conformity and market acceptance, any new intermodal unit should conform to international standards.

TURNING BACK THE TIDE — A YEAR OF SUSTAINED ACTIVITY IN EUROPE contd./...

The long-running review of the Community Customs Code continues and ECASBA has been in discussion with DG-TAXUD on those issues that relate to our members, such as the proposed 24 hour notice requirement for import cargo and the welcome proposals to allow companies that meet certain Community-wide service criteria to benefit from reduced Customs compliance requirements. ECASBA has therefore given its strong support to the Authorised Economic Operator (AEO) concept and has encouraged all its member associations to enter into discussions with their local customs authorities with a view to allowing their members to gain accreditation at the earliest possible opportunity.

The AEO concept will also bring significant advantages in the field of intermodal security. Earlier this year, before the AEO concept was published, ECASBA held talks with officials at DGTREN on the introduction of a “known party” programme for ensuring the entire intermodal supply chain was secure. ECASBA was therefore very pleased to note that the AEO proposals included granting accredited companies enhanced security clearance and has encouraged DG-TREN to give ensure the AEO concept is fully embraced in the intermodal security proposals.

ECASBA also sees the granting of AEO status as being tantamount to the awarding of a “quality label”. The proposed criteria for AEO status are strict and will ensure that any designated companies have in place the systems and procedures necessary to provide a high-level of service and professionalism and this, in an industry where almost anyone can become a ships agent, will go some way to meeting FONASBA’s long-held ambition of securing official recognition for the agency industry.

On environmental issues, ECASBA members have played a vital role in implementation of the Directive on Disposal of Ship-Generated Waste, a role which was acknowledged earlier this year when ECASBA was asked to contribute to the study being carried out for the European Maritime Safety Authority which seeks to determine how successful the Directive has been in reaching its goal of providing an efficient, Community-wide, waste disposal system.

Finally, ECASBA has welcomed the proposals from Commission President Barosso and Commissioner Borg to establish a coordinated, holistic European maritime policy. The aim is to give Europe a framework covering every aspect of its relationship with the sea, covering commercial, environmental, tourism, leisure and manufacturing issues. ECASBA has already given its initial thoughts to the Commission and will be maintaining a keen interest in this initiative as it develops.

Doubtless in the coming months there will be other proposals issuing from Brussels and ECASBA is committed to ensuring that the views of its members are voiced and, equally importantly, heard in the corridors of power. In our efforts to cover all the issues we are fortunate to be able to call upon the support of our colleagues at FEPORT, who represent ECASBA in Brussels, and of the members of our technical Working Groups who provide specialist input to our deliberations.

FONASBA ANNUAL MEETING 2004

The 35th Anniversary FONASBA Annual Meeting was held in Budapest, Hungary, in October.

The meeting was the best supported in recent years, with approximately 140 delegates and accompanying persons attending. Joining the Annual Meeting for the first time were delegates from newly-elected FONASBA members Mexico and Romania and the recently formed Algerian association, APAMA, not currently a FONASBA member, attended as an observer. In a change to the format of previous meetings, the work programme included two seminars and a meeting for association secretaries.

The first plenary meeting was that of ECASBA, FONASBA's European committee. Maritime related activity within Europe continues to exert an influence way beyond the geographical boundaries of the region and the meeting was very well attended, with most non-EU associations being represented. The proceedings were centred around the annual report by ECASBA's Brussels office, which summarised the developments over the previous twelve months. This covered issues under three broad categories, transport policy, safety and environment and port policy. ECASBA is proactive in protecting the interests of its members in all these areas and full details of the action undertaken by the committee on the appropriate issues are recorded in the ECASBA report on page 14.

One area in which ECASBA and its members have been particularly active is the promotion and development of short sea shipping. ECASBA member associations are represented on the majority of the national promotion centres and many companies within those associations are involved in the commercial use of short sea shipping on a daily basis. The increasing size of vessels, particularly in the container trades, is significantly reducing the volume of business through smaller ports and the development of short sea services is seen as being vital to ensuring that those ports continue to operate. It was therefore appropriate that the first seminar was on this subject.

Presentations were given by Antonio Belmar da Costa (Portugal), coordinator of the ECASBA Short Sea Shipping Working Group, Tonny Paulsen (Denmark) of short sea operator Unifeeder, Sander van't Verlaat of the Dutch promotion centre and Botond Szalma of the Hungarian association. The presentations covered the subject from the promotion, operation, and legislative viewpoints and the final contribution, by Botond Szalma, covered the use of the Danube river as a major transport artery and the contribution of river transport to the development of a sustainable waterborne transport chain.

The plenary Meeting of the Liner & Port Agency Committee focused to a significant extent on the latest developments in the area of port security, with particular emphasis being given to access to vessels by agency staff and contractors, ship suppliers and others, concerns at the lack of transparency in port security charges and the fears that some ports were using security charges as a means of securing commercial advantage over their competitors.

Port security also featured in the subjects under discussion during the plenary meeting of the Chartering & Documentary Committee, this time concentrating on the implications of the ISPS Code on shipbrokers. Thomas Timlen of BIMCO gave his organisation's views on this issue and also reported on recent output from BIMCO's Documentary Committee. Members also received an update on the revision of the carriage of goods by sea liability regimes being undertaken by UNCITRAL. FONASBA has regularly expressed its views on the proposals to both UNCITRAL and CMI, the international maritime lawyers organisation, and with the consultation process now nearing completion, FONASBA Honorary Member John Barclay issued a timely reminder to national associations to take up the issues with their own national authorities to ensure their views were taken into account. The meeting concluded with a presentation by the German Shipbrokers Association on the Hamburg Index of rates for tramp container vessels.

FONASBA ANNUAL MEETING 2004 contd./...

The second seminar took up the theme of port security running through the entire meeting and featured presentations by Patrick Verhoeven, Secretary General of ESPO, on the impact on ports, Aziz Mantrach, of FONASBA member APRAM, Morocco, who reported on his association's proactive role in the introduction of the various measures in Moroccan ports, and Dr. jur. Wolfgang Elsner of the European Commission, who spoke on the proposals to develop a European intermodal security framework.

In another departure from previous practice, the programme also included a meeting for the association secretaries. Recognising the vital role that secretaries play in the efficient running of their respective organisations, the meeting gave an opportunity for exchange of views on matters of mutual concern, such as recruiting and retaining members, providing added value to the membership and raising the profile of the association — and FONASBA— with their local authorities. The meeting proved to be a significant success and will also feature in the programme for the 2005 meeting.

Two of FONASBA's regional range committees, MABSA, comprising members in the Mediterranean and Black Sea area, and CIANAM, covering members in the Americas, also met to discuss matters of local interest and concern. FONASBA has four range committees, the others covering the Far East and the Nordic countries and these met in their home region ahead of the Annual Meeting. All four committees reported to the membership during the Liner & Port Agency Committee meeting.

The 2004 meeting concluded with the Council Meeting. In addition to the normal administrative tasks, the meeting approved a proposal from the Executive Committee to hold the 2006 Annual Meeting in Morocco and elected a new President, Philip Wood FICS (Great Britain) and Executive Committee. Details of the new Executive Committee may be found on page 11.

A full schedule of social activities, based largely on the cultural and historical heritage of Hungary, was arranged by the host association.

The 2005 Annual Meeting will be held during the period October 19th — 22nd in Tokyo, hosted by the Japan Association of Foreign Trade Shipping Agencies.

EXTERNAL RELATIONS: COOPERATION WITH OTHER INDUSTRY BODIES

FONASBA fully supports the concept of joint action on appropriate issues and enjoys close relations with other bodies in the shipping industry, both on an international and regional basis.

The International Association of Independent Tanker Owners, INTERTANKO, has been a Club member of FONASBA for many years and both organisations regularly exchange information and consult on issues of mutual interest. INTERTANKO is also a regular participant at the FONASBA Annual Meeting, where its representatives provide input to both the Chartering & Documentary and liner & Port Agency Committee meetings.

Also represented in Club membership are the Baltic Exchange, the Shipbrokers Register and International Transport Intermediaries Club, ITIC, who provide assistance to members on issues such as charterparty disputes, documentary fraud and international legal developments.



Photo courtesy of BIMCO

FONASBA also maintains very close links with BIMCO and is represented, through a member of the FONASBA Executive Committee, on BIMCO's documentary committee. BIMCO recognised the Federation's pre-eminence in the agency industry this year when it invited President Philip Wood to chair an industry sector forum on the agency industry as part of its Centenary celebrations in Copenhagen in May—see photo left. Representatives of BIMCO also regularly attend the FONASBA Annual Meeting and contribute to the discussions on documentary issues and the relationship between the ship agent and broker and the shipowner.

FONASBA is also developing closer ties with other shipowners associations such as the International Chamber of Shipping and Intercargo and hopes these will lead to a greater understanding by the shipping community of the value of the services provided by agents and brokers.

As referred to in the report on the activities of ECASBA, the European Community plays a major part in the development of maritime policy and accordingly ECASBA maintains very close relationships with the major European industry associations. FEPORT, the Federation of European Private Port Operators, provides ECASBA with both direct representation in Brussels and updates on new and on-going policy issues. Information is also regularly exchanged, and where appropriate common positions agreed, with the European Seaports Organisation, ESPO, and the European Community Shipowners Association, ECSA. Until recently, ECASBA was a member of the Transit Action Group, a confederation of organisations which shared common interests on customs and transit issues, with the Group acting as liaison between industry and the European Commission's Directorate General for Taxation and Customs Union, DG-TAXUD. Following the demise of the Transit Action Group earlier this year, many of the members decided to continue to discuss issues of common interest on a less formal basis and ECASBA now exchanges views with the European freight forwarders organisation, CLECAT, amongst others.

EXTERNAL RELATIONS: COOPERATION WITH OTHER INDUSTRY BODIES contd/...

For many years ECASBA has enjoyed excellent relations with the Commission's Directorate-General for Transport and Energy, DG-TREN, which is responsible for the majority of legislative proposals that affect our industry sector, and these continue to date.

ECASBA is also an active participant in the European Maritime Industries Forum, which is the primary body for joint Commission/industry liaison. Although dominated by the ship operating, building, repair and marine equipment sectors, the Forum nonetheless offers the opportunity for ECASBA to meet with all sectors of the industry on a regular basis.

In 2003, a number of national agents and brokers associations in Latin America formed CIANAM, the Cámara Interamericanos des Asociaciones Nacionales des Agentes Maritimos, with a view to providing a forum for discussion of, and the taking of action on, issues of mutual interest and concern in the region. Founding associations included FONASBA members FENAMAR, Brazil, and Centro de Navegación, Argentina, and although it is a separate organisation, FONASBA has supported CIANAM since its inception.

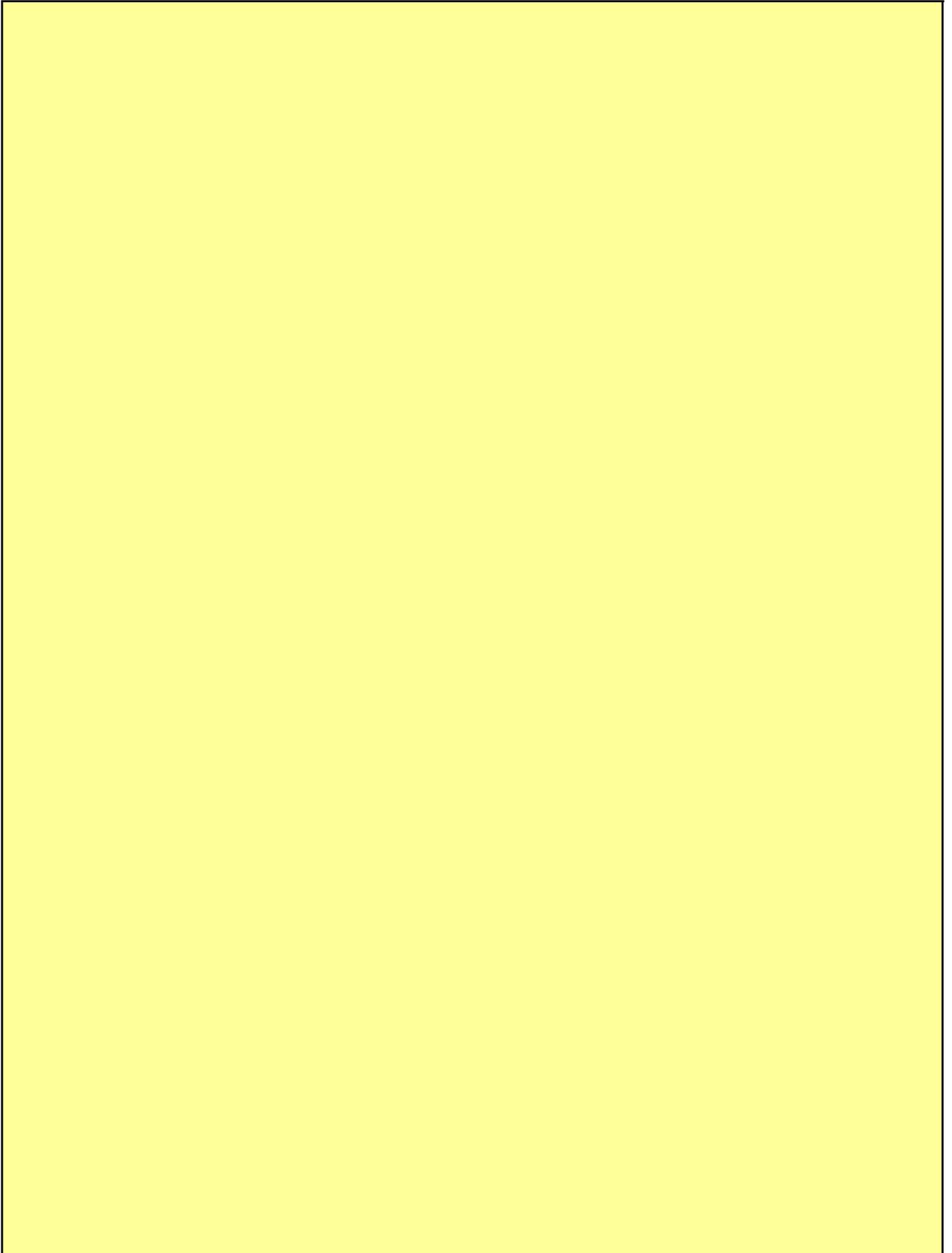
CIANAM has been very active in assisting its members in promoting and protecting their national and regional interests and in promoting the benefits of FONASBA membership to other associations in the area. Through their actions, FONASBA membership in Latin and South America has increased from two to four, with AMANAC, Mexico, becoming a full member and Centro de Navegación, Uruguay, becoming the first Candidate Member.

Recognising that there are issues specific to particular regions, FONASBA has established a number of range committees covering the Nordic countries, the Mediterranean and Black Sea region and the Far East. The increasing presence of FONASBA in Latin and South America and the requirement for specific action in the region led to FONASBA designating CIANAM as its range committee for the region.

CIANAM membership currently comprises the national associations of Argentina, Brazil, Chile, Mexico, Paraguay, Peru and Uruguay and is in discussion with a number of other associations in Latin and South America and the Caribbean.

COUNTRY REPORTS

The following pages contain reports from FONASBA member associations, covering their activities during the year



Member Association Report — ARGENTINA

Association: *Centro de Navegación*

Membership: 58

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Centro de Navegación

Association Activity

Centro de Navegación is a very active participant in international forum such as CIANAM, the Inter-American Chamber of National Associations of Shipping Agents where it currently holds the positions of chairman and secretary. CIANAM is playing an important role in the region in promoting common policies to improve the shipping business and to eliminate regulations that distort trade. Centro de Navegación is also very proud that Mr. Patricio Campbell holds the position of Vice President of the Americas in FONASBA.

Locally, it has a strong relationship with several entities related to foreign trade, including Exporters, Importers, Commerce and Shipowners Chambers, Commission for Transport Customers among others, in order to develop good policies for our nation.

Centro de Navegación has an educational institute (CENTRO DE ESTUDIOS DEL COMERCIO MARI-TIMO INTERNACIONAL- C.E.C.M.I) that offers a 3 year degree course in Management on International Shipping Business (Administrador de Transporte Marítimo Internacional). Currently there are 30 students attending the first year who receive courses with top professionals of the Shipping Industry in Buenos Aires, and the students receive certifications like ISPS Code (Company Security Officer), and on ISO rules among other courses. Students attend from Monday to Friday 3 full hours a day during 9 months per year.

Foreign Trade

Argentina is one of the biggest exporters of grains, vegoils and by products with a production of approx. 84.000.000 tons. Exports reached a historical record, with an increase of 12 % compared with last year. The total value of Argentina's exports in 2004/5 amounted to approximately US\$ 40 billion. Other major export commodities include fruits and agricultural produce which are shipped through the ports of San Pedro, Campana and San Antonio Oeste.

In the container trades, Argentinean ports also expect to handle 1.300.000 TEU this year.

Port Situation

Argentina currently has 84 ports and/or facilities certified to ISPS Code standard.

Approximately US\$ 450 Million has been invested in port facilities, primarily in those handling grain, vegoil and by products such as Necochea, San Lorenzo, Rosario and Bahía Blanca.

In October the Cruise season starts, with approximately 70 Vessels expected, mainly in Buenos Aires, Puerto Madryn and Ushuaia.

2005 saw the first 5,500 TEU container vessels calling at Argentinean ports. The facilities at Buenos Aires and South Dock have the capacity to handle vessels of this size.

Member Association Report — BELGIUM

Association: NAVES vzw

Membership: 134

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NAVES comprises five organisations covering the seaports of Antwerp, Zeebrugge, Ghent, Ostend - Newport and Brussels. The Antwerp Shipping Federation provides secretariat services.

In the past year we had to face a number of threats but also enjoyed many opportunities.

Customs issues, both in Belgium and the EU, have featured large in the association's activities in the past year. Belgium was one of the first countries in Europe to fully integrate the New Customs Transit System (NCTS) and as some neighbouring countries were not as far advanced we had, and still have, to cope with a tremendous increase in non-cleared transit declarations. As many of those declarations are issued on behalf of ships agents (carriers haulage), the administrative burden on agents in processing these declarations whilst at the same time trying to avoid severe customs claims and fines was very heavy and costly but the task was accomplished. To put the task into perspective, some 50% of the 275 million tons of cargo handled through our ports is in transit to and from our hinterland.

In March this year, the European Union Court of Justice in Luxemburg, determined that errors in the Summary Declaration of an incoming vessel would render the cargo as an "illicit import" and unfortunately Belgian Customs law decided that in such cases the ships agent would be held liable. As this very clearly goes against the internationally accepted conventions on ships agency, NAVES has been extremely active in bringing together agents, lawyers and P&I clubs on the issue. We are coordinating all information, are giving advice and are supporting the organisation of an international Symposium on discrepancies between Belgian Customs law and the European Customs Code in December.

In compliance with the European Directive on Disposal of Ship-Generated Waste, Flanders, the federal state of Belgium responsible for port matters, initiated in 2004 a system of payment for waste disposal which NAVES supported as being a very effective, and possibly unique, means by which to achieve the Directive's goal of disposing of waste in a controlled way and thus avoiding pollution at sea. Unfortunately however, the Commission disagreed and ruled that the system did not conform to the regulation, and so Belgium was forced to introduce a scheme similar to that in place in other Member States.

On the positive side, we were able to bring about a number of changes that boosted the Belgian maritime sector.

Most important was the agreement with the Netherlands for the deepening of the river Scheldt and for a joint management of the traffic on the river.

Through close contact with pilotage and VTS services and port authorities, we assisted in bringing about better collaboration between all players in the nautical approach chain and by this contributed to an improved quality level of the services. We also contributed to the introduction of a single ISPS security pass "AlfaPass", and initiated the development of an "E-Counter" for vessels, an electronic release procedure for containers and an electronic pre-announcement system. Together with the Antwerp forwarders federation we initiated the development of a full-electronic payment system and started several actions on promotion of our profession and on training of our staff.

Last but not least, we remain in regular contact with our good neighbours from the Netherlands, VRC. Both our countries are relatively small, have big ports and depend a lot on transiting cargo and therefore both enjoy the dubious honour of identical problems and challenges...

Member Association Report — BULGARIA

Association: *The Bulgarian Association of Ship Brokers and Agents*

Membership: 48

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BASBA has 50 members, three having joined in the last three months. The association comprises a liner agents section, a brokers section and a Danube river section within its structure. Liner agent members represent all major lines operating in Bulgaria, while broker members represent some of the biggest industrial (chemical, extracting and energy) companies and some of the largest shipowners, in the region.

BASBA members act for about 80 % of ships calling at the ports of Varna region, about 90 % of ships calling at Danube ports of Bulgaria, and also hold a considerable part of the market of agent services in the Port of Bourgas (about 30% and increasing).

The Liner agents section works most intensively on providing mutual standards and practices. Last year the section started preparing a new type of regular (quarterly) statistics report on international containerized imports and exports through our Black Sea ports. BASBA also prepares a wide range of statistics on ships and cargoes at Bulgarian ports.

In December 2004 a Code of Conduct was introduced with the full support of all members of the Association.

In the same month, BASBA, supported by other local maritime interests, established the Bulgarian Short-Sea Shipping Promotion Centre. In April 2004, in cooperation with TAIEX Unit, DG Enlargement we held a workshop, where BASBA presented a report on "Burdens of Transportation of Cargoes Through Bulgarian Ports and Inland Territory".

Regrettably, dialogue between industry and the government remains poor. There is a scarcity of shipping specialists in the Parliament and in the Ministry of Transport whilst at the same time the authorities are unwilling to give consideration to our opinions and proposals.

In December 2004 the government established a state-owned nationalised company to operate Bulgarian ports. The government claimed this would guarantee liberalization of the port services market but exactly the opposite occurred. BASBA made strong efforts to have these articles cancelled, claiming in particular that the developments contravened EU law. As a result of our efforts, the Bulgarian Constitutional Court held in May 2005 that the National Company Ports was in contradiction of Bulgarian Constitution and the company was closed down. Unfortunately, during the last 2 months the new Bulgarian government has indicated it may re-establish the company. We are currently in discussion with the government and it is most likely that BASBA will need help from FONASBA and ECASBA to resist our government's desire to control all port activities and companies.

BASBA is actively campaigning for the introduction of internationally accepted industry standards for vessel arrival and departure procedures (report and clearance) and health checks as well as introduction of the IMO-FAL convention, with all these operations being supported by increased use of EDI. Unfortunately these procedures are, at present, complex, time-consuming and do not reflect current European best practice. Bulgaria has ratified the IMO-FAL Convention but its procedures have not yet been introduced. BASBA has provided detailed information to the authorities on these various issues and will continue to press for their introduction as soon as possible.

Member Association Report — BRAZIL

Association: *Federação Nacional das Agências de Navegação Marítima (FENAMAR)*

Membership: 12

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Simplification of Brazilian Customs Procedures: Fenamar is participating in the discussions involving this very important project led by World Customs Organization (168 countries) focusing the integration of the Customs among Country-members.

CE–Mercante - Since July of 2004 Fenamar has lead on the development of a new Government Information System that will replace the present CE-Mercante system. Fenamar is busily involved in ensuring that the new system will continue to protect the receiving of freight/tax values by the Carrier before the cargo is cleared/picked-up by the Brazilian Importers.

NR-29 – Regulation on protection of Labor at ports facilities and vessels. Fenamar is leading the Committee in charge of the discussions requested by Brazilian Government towards this regulation. So far Fenamar has succeeded to introduce a few changes which benefited the Agents.

Siscomex 24 hours – The Export Information System in Brazil requires that full information on cargo loaded should be input by the Agency up to 24 hours (running day) after vessel's departure otherwise a heavy fine should apply. Fenamar voiced its opposition to this procedure in Sept /2004 and succeeded in changing the deadline to 7 days. The new procedure started on January 02nd this year and prevented heavy fines being applied.

CNT – National Transport Confederation – In January 2005 Fenamar took on the Presidency of The Maritime Section of CNT, the most important Transport Association in Brazil.

Quality Label Certificate – Similar to other schemes operating elsewhere, Fenamar is this year expected to complete a project to introduce a Quality Label Certificate for Brazilian shipping agencies.

EDI Services / VAN – Fenamar just concluded a project to offer Brazilian shipping agencies an IT service for the efficient transmission of EDI data, to/from Port Authorities, Customs, etc, whilst reducing costs. Fenamar has been working on the development of this project for 18 months.

Pilotage Services – This service is a monopoly and lately some ports in Brazil are experiencing extremely high increases in the tariffs, which are being imposed unilaterally by the Pilots Association, Vessels loading grain and bulk cargoes are particularly affected. FENAMAR is taking action on this issue.

CIANAM – Fenamar continues supporting the development of CIANAM. In April 2005 we attended a General Assembly in Uruguay and CIANAM is closely involved in all the debates in which Fenamar participates.

Statistics – As mentioned on item “Pilotage”, FENAMAR is engaging in a analysis of the port conditions and costs in Brazil.

Member Association Report — CROATIA

Association: *Udruga pomorskih agenata Hrvatske (ASBAC)*

Membership: 24

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ASBAC continues to increase its membership with two new members joining recently.

The association is proactive in promoting communication between the maritime industry and the Croatian authorities and supports increased professionalism amongst its agent members.

In spite of our attempts to achieve closer cooperation with the Croatian parliament (the Diet), our association was not invited to assist in the development of the new Maritime Law framework, which was adopted in December 2004. Whilst only ten articles out of a total of more than one thousand directly affect agents, most of the new articles affect the agency industry to a greater or lesser degree and we were extremely disappointed not to have been consulted, particularly as we were led to believe that our knowledge and experience was valued and that our input would be sought.

The failure to recognise the value of the agency industry in Croatia is an issue of major concern to our association but we continue to press our case with the government authorities in the hope of achieving the desired level of recognition. On a more positive note, however, ASBAC is represented on the administrative committee of the Croatian Short Sea Shipping Promotion Centre which came into being in May 2005.

We are pleased to report that seaborne traffic through the ports of Rijeka and Ploče is increasing, with both the break-bulk and container sectors showing positive gains. Rijeka handles most of Croatia's international trade whilst Ploče is primarily concerned with cargo movements to and from Bosnia and Herzegovina.

As a candidate member of the European Union, Croatia looks forward to increased cooperation with the other member states, as well as support for its efforts to become fully integrated. As a small country, but one rich in human and natural resources, we are optimistic about our future membership of, and our ability to make positive contribution to, the Community.

Member Association Report — CYPRUS

Association: *The Cyprus Shipping Association*

Membership: 35

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In the past year, the Cyprus Shipping Association (CSA) has been involved in numerous issues affecting the Cyprus Shipping Agents especially so because, as a result of Cyprus becoming a full E.U. member, the Country and of course the Shipping Agents' profession have been faced with many changes.

1. Port Reception Facilities

As from 1.5.2004 the new regulations governing the Port Reception Facilities have been implemented for ship generated waste and cargo residues, both operational and financial. The CSA has been involved in consultations with the Cyprus Ports Authority (CPA) concerning implementation of the regulations.

At the same time we have started a dialogue with the CPA proposing some revisions to the regulations aimed at securing a balance of interests between the ports and the vessels within the frame of the relevant European Directive.

2. New proposed Directive on Seaports

During this period, the CSA has continued its exploratory dialogue with the CPA, the Government and other port users regarding the development of the Cyprus Ports and the method of operation in the light of the general discussion within the E.U. on the proposed Directive on Seaports.

3. Short Sea Promotion Center (SPC)

Our Association has been working closely with the Cyprus Ports Authority and the Cyprus Chamber of Commerce and Industry for the creation of a Short Sea Promotion Center in Cyprus. It is anticipated that the Cyprus SPC will be established during 2006 with the assistance of TAIEX and the SPC's of Spain and Italy.

4. Port Labour Council

As a member of the Port Labour Council, the CSA together with the Ministry of Communication and Works, the CPA and the port Labour Unions is involved in the consultations concerning the manpower requirements of the Cyprus Ports, as well as training and safety issues.

5. ISPS

In close cooperation with the Ministry and the CPA, the Association is involved in the implementation of the ISPS code in the Ports of Cyprus having secured for the Agent workable and simplified procedures.

Member Association Report — DENMARK

Association: *The Danish Shipbrokers Association*

Membership: 125

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The general shipping climate in Denmark is good, the members are busy and there is a good corporation between the various shipping interests to mutual benefit.

However, the association representing the public owned ports is aggressively arguing that they should be permitted to enter into shipbroking and stevedoring activities and their arguments are brought forward in all possible fora. There is considerable doubt about the validity of the arguments they are putting forward and this has made the relationship to this organisation difficult.

Recently, the Danish law on ports were amended enabling ports—in very special circumstances and after approval from the Minister of Transport—to get involved in business which private operators are not prepared to handle.

Education is still an important area for the Association and we are heavily involved in education of shipping-apprentices and TutorShip. Furthermore, seminars are performed in Practical Shipping Law.

During the year we have produced a book covering the various aspects of Port Agency, Liner Agency and time and voyage chartering. The book is intended for use by those studying maritime courses at commercial schools but also as a book of reference in shipping companies. The material is rather detailed and runs into some 500 pages (mainly in Danish).

Unfortunately, not enough apprentices are employed in Danish shipping and we are trying to convince our members to be more inclined to employ apprentices.

ISPS compliance is fully implemented in Denmark and operating well and the members handle many tasks, generally against a special ISPS-fee.

The Schengen-rules are also operating well, except for cruise vessels where there often are problems because the rules are implemented in different ways in the Nordic countries. The problems are being discussed with the Danish authorities.

During the year we have been involved in various topics and the following merit mention

- Change of custom rules
- Electronic cargo documents
- Ship-to-ship operations
- VAT on shipping activities
- Transportation of veterinarian products
- Liability insurance
- Recycling of vessels

Member Association Report — DUBAI

Association: *The Dubai Shipping Agents Association*

Membership: 52

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The activities undertaken by the association in the past twelve months are as follows:-

1. We at the DSAA had conceived, designed and developed an event called MEET & GREET SERIES, which is held on a quarterly basis, and has an interaction directly with the senior officials from Dubai Ports and Customs, wherein DSAA members discuss the day-to-day problems they face and they get instant replies / suggestions. This has been a very popular event.
2. MARINE INSURANCE & CARGO CLAIMS – this seminar was held in Feb. 2004, at Dubai Chamber of Commerce & Industry.
3. BILLS OF LADING – this seminar was held at the Cruise Terminal and was attended by almost 250+ participants.
4. ISPS CODE SEMINAR – this event was held in June 2004, to update the members with the new ISPS codes, which came into effect from 1st July, 2004.
5. PROMIS PRESENTATION – this event was held in Oct. 2004, in conjunction with Dubai Ports Authority and British Maritime Technology.
6. CAMBRIDGE ACADEMY OF TRANSPORT (UK) (CAT)– held their seminar during Oct. 2004 called Container course.
7. DSAA in conjunction with CAT is planning to organize evening classes for the shipping community to educate them on shipping related topics.

Apart from the above DSAA has been a support sponsor for the following events:-

- TRANSPORT EVENT M.E. (MALAYSIA) – June 2004
- SEATRADE M.E. – Dec. 2004
- BIMCO SEMINAR – This event is held on yearly basis in Dubai. The last event called Alpha to Omega of Shipping Law was held in Feb. 2005. This event was attended by 80 participants from 20 different countries.
- Cambridge Academy of Transport (UK) – had organized 5 days training course during Feb./Mar. 2005 called Anatomy of Intermodal Transportation. This event is also held on yearly basis.
- APTS M.E. – March 2005.
- INSTITUTE OF CHARTERED SHIP BROKERS (ICS) – April 2005.
- Materials Handling Exhibition by EPOC Frankfurt – May 2005.
- DUBAI INTL.ARBITRATION CENTRE – had organized Maritime Dispute Resolution conference during June 2005.

DSAA is a support sponsor for a major maiden event called SHIP PORT ARABIA 2005 which will be held during 1st week of Sept.2005., wherein DSAA is organizing one full day conference called **DUBAI SHIPPING CONFERENCE**.

Apart from the above, DSAA also conducts recreational events for their members to enhance their sporting skills and develop sportsmanship, apart from getting the shipping community together i.e. cricket, table tennis, bowling, football etc.

As a part of its philosophical attitude and for the betterment of the society, and to serve the community, DSAA year-marks a certain amount realized from its revenue to charitable organizations.

Member Association Report — FINLAND

Association: *The Finnish Shipbrokers Association*

Membership: 71

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During the first half of this year the industry faced some unrest within the stevedore industry until the unions came to a wage agreement and a new 2 year contract was signed. The paper industry was however severely hampered by the wage conflict between employers and the paper workers union that stopped the production and paper export for nearly two months. Finally an agreement between the industry and the union was achieved for a 3 year period. A risk in the future is that the paper industry will mainly invest in new factories with paper machines abroad closer to the markets. Otherwise the prospects for the industry look fairly bright for the next future.

A year ago, Parliament approved the so-called "Maritime Support Package" and the Finnish owners today look somewhat more optimistic to the future than earlier. Some have even invested in newbuildings, the first time in many years.

Within the Association, the main topic during the ongoing year is still the open issue of fairway dues and legislation. The working group established by the Ministry of Communication to draft a proposal for a new law concerning the fairway dues concluded their work in September last year. The proposal was however surprisingly withdrawn shortly before presentation to the Parliament. This due to the fact that the constitutional committee of Parliament concluded that the fairway dues should actually be considered as a tax. Consequently the working group had to draft a new proposal for a fairway tax. The new proposal was published in July and is now put forward for evaluation and comments from the maritime industry and associations.

From our point of view the proposal includes a significant improvement, the agents responsibility for payment of fairway tax is suggested to be 9 months instead of 3 years as being now. The Finnish Customs, being the party responsible for the tax collection, is however strongly against the proposed limitation of agents' responsibility.

Our objective though remains to limit the individual Agents responsibility for the official fairway tax to one year from date of call. It is the Ship-Owner that should ascertain which ice class is valid for his vessel when trading to/from Finland. Consequently the responsibility to report the valid and correct ice class lies with the Owners, and not with the Clearing Agent. Another positive development has also taken place during the last months. The Finnish Maritime Administration has reinstated the original ice class for some 100 vessels which they had earlier declassified. Consequently also the claims for paying additional dues for these vessels are withdrawn.

This spring we finalized drafting a guideline to Agents for transit cargo procedures. The guidelines were released to our members beginning of June.

The Association is working actively in order having the English language accepted by authorities as basis for granting pilot licenses. As it is now license is granted only based on the Finnish and Swedish languages. As the situation in Germany is the same we have contacted our German colleagues for a joint approach in this matter.

The HELCOM implementation of the Baltic strategy for port reception facilities for ship generated wastes whereby vessels are compiled to pay garbage fee in each and every port of call in the Baltic is also on our agenda. We will work, together with our Nordic colleagues, for a change towards a more reasonable Helcom waste strategy.

The Finnish Shipbrokers' Association held its 85th annual meeting in Helsinki on February 3rd 2005 and Mr. Rolf Sandberg was re-elected as Chairman. At the end of 2004 membership had increased to 71, which of course a very positive development. The economy of the Association is satisfactory taking into consideration that the income is based almost only on the membership fee. Our objective remains to contribute best possible to an increased welfare and appreciation of our Members and the Shipping industry in general.

Member Association Report — FRANCE

Association: *FACAM*

Membership: *142*

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The French Ships' Agents Association has been very active on a number of issues over the past twelve months.

Unfortunately, recent activity has been concentrated on the effects of the decision by the Government to increase the efficiency and competitiveness of stevedoring services in the state-owned "Ports Autonomes" through a privatisation process. This has led to a series of strikes by employees at the affected ports and this in turn has led to disruption to port operations, with regular lines being particularly affected.

Through regular contact with member companies the association has continued to monitor changes to port tariffs, with particular attention being given to pilotage and towage charges.

In tune with the requirements of the European Commission's Port Services Directive proposal, the port of Le Havre has announced that it aims to introduce competition for the provision of towage services. This is the first French port to consider such a move and the matter will be closely followed by the Association.

All French ports were in full compliance with the requirements of the ISPS Code on July 1st 2004. In common with other national associations, we remain concerned about which party should be responsible for the costs associated with enhanced security measures. The association continues to discuss this issue with the Government and port authorities.

The association is in regular contact with the French Government on the EC Customs simplification programme and have expressed our views on issues relating to authorised economic operators, Customs fraud and security, authorised shipping services, smuggling and others.

Recognising the increasing burden on agents of compliance with mandatory requirements such as ISPS Code reporting, waste disposal and others, the association recently reminded all its members of the advisability of ensuring that they have adequate insurance cover for their liabilities in these areas.

Finally, the association continues to work with the French Government to secure official recognition of our profession. Progress to date has been slow but regular contact is maintained with the appropriate authorities. We feel sure that the increasing burden of compliance with mandatory requirements, and the vital importance of a secure, efficient and effective supply chain, will in time lead to this objective being achieved. As in all other FONASBA member associations, ultimately our aim is to ensure that the value of our members to the international transport industry is understood, appreciated and that our views are respected.

Member Association Report — GERMANY

Association: *Zentralverband Deutscher Schiffsmakler*

Membership: 400

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The German Ship Brokers' Association (ZVDS, Zentralverband Deutscher Schiffsmakler) is the federation of the 12 local ship brokers' associations in Germany. Its largest member association is the Hamburg Shipbrokers Association (Hamburger Schiffsmakler und Schiffsagenten e.V.) with some 170 members. Membership of ZVDS comprises liner agencies, chartering brokers, port agents and sales and purchase brokers.

The main purpose of the ZVDS is to promote the joint professional interests of German ship brokers and agents, without imposing any restrictions or supervision on the economic freedom of the individual companies. The ZVDS handles all concerns of the shipbroking business that are of a general nature, representing the interests of all its member companies. This work includes relations with the authorities, and with other national associations and institutions.

ZVDS is a member of the ShortSea Promotion Center and works in this context for more favourable local policies for the seaports and inland navigation ports. It develops initiatives for improvement of the intermodal use of ports and their hinterland connections, for efficient port operations, for improvement in communication in port operations, and for simplified flow of documents. Another aspect of business location policy is reflected in the efforts of the ZVDS for practically reasonable implementation of the ISPS code, in such a way as to ensure the security of the ports and at the same time to ensure that there is no undue burden on easy movement of traffic and services within the ports. The same applies to the Draft Directive of the European Commission for market access to port services (Port Package II). The ZVDS provides advice and consultation to the German Government in conjunction with other maritime associations. The key focus here is on maintaining and enhancing the competitiveness of the ports. In this context, the ZVDS works for deregulation of the pilotage system, in order to replace monopolistic structures by competition.

The ZVDS also publishes various professional documents such as the General Business Conditions, which are currently being revised to align them with changes in competition law. In collaboration with the German Shipowners' Association, the ZVDS also publishes a textbook for young people starting out in the shipping business; a new edition is due for publication in 2006.

Some of the members of ZVDS also belong to the Association of Small and Medium-Sized Enterprises (Mittelstandsvereinigung). These are SMEs which have to compete with large, globally operating companies. They accept the recommended (non-binding) prices issued by ZVDS for clearing of seagoing ships in Germany.

ZVDS is a founding member of FONASBA and ECASBA. That is indicative of the great importance attached by ZVDS to cooperation at both international and European level.

Member Association Report — GREAT BRITAIN

Association: *The Institute of Chartered Shipbrokers*

Membership: 114

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The Institute of Chartered Shipbrokers (ICS) is an internationally recognised professional body representing Shipbrokers, Agents and Managers in the United Kingdom and Overseas, with some 3500 Individual and 114 Company Members. Within the United Kingdom, The Institute, through its Federation Council, is the Trade Association for its Company Members.

Membership of the Institute commits its Company and Individual Members to maintaining the highest professional standards.

The Institute, is extremely active on behalf of its members, and through its Federation Council is the recognised interface for the UK Government, its various departments and other national and local authorities. During the past year the Federation representatives, as well as having a permanent place on a number of Government committees, have been directly concerned with a number of consultations and initiatives involving Her Majesty's Revenue and Customs (HMRC), Maritime Coastguard Agency (MCA), and the SITPRO Security Committee amongst others.

Because of its close contacts and excellent relationship with these Government Departments, following major changes to their working procedures, the Federation Council has made agreements on behalf of its Company members for them to undertake certain responsibilities on behalf of those Authorities. This not only aids the UK Government and the Company Members, but also assists in the smooth and efficient movement of ships and cargoes, thus benefiting all. Further developments of this nature are in ongoing discussion.

The close links with FONASBA and ECASBA are an important part of this role and the Institute Federation Council has played an active part in the various developments and consultations that have occurred over the past year. Where needed the Federation representatives have used their contacts with the UK Government to influence policy and practical applications of new European and International legislation. Members of the Institute also sit on a number of FONASBA and ECASBA committees.

Education and Training are major roles of the Institute, and its Tutorship arm celebrated its highest number of students worldwide during this last year. Various levels of study and examination covering all the main disciplines of shipping, shipping law, economics and finance are available and are supported by distance learning procedures.

A number of one day training courses, the 'Business of Shipping' for example, are also available and have been given in support. These are available in London or can and have been given in company premises around the country. The courses can also be given overseas. Additional courses are under development and are due to be launched shortly.

Member Association Report — HUNGARY

Association: *The Hungarian Shipbroking & Shipping Agents Association*

Membership: 13

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website:



In addition to its membership of FONASBA/ECASBA, the Hungarian Shipbroker and Shipping Agents Association is a member of the MVVLSZ (Hungarian Rail-, Water- and Airtransport Association) and an associate member of MSZSZ (Association of Hungarian Forwarding and Logistic Service Providers)

The shipping industry in Hungary is quite peripheral due to the landlocked location of the country. The sole national shipping company MAHART has been divided up during 2004 and the last two seagoing vessels flying the Hungarian flag were sold last year and by selling these vessels a long lasting tradition came to an end. The river cargo fleet of MAHART has been privatized this year and now same controlled by DDSG of Austria. There is one locally owned private company in the river transport, namely FLUVIUS Ltd. which is expanding rapidly. In consequence of the aforesaid the local shipbrokers are fully exposed to the free competition world-wide and the agents are mainly acting as booking agents of the sea-shipping lines or they are combining their activities with forwarding view the port agency is not compulsory at all in the river ports.

In May 2004. the Republic of Hungary has become full member of the European Union. By joining the European Union the bilateral shipping agreements signed by Hungary earlier with the EU member countries situated alongside the Danube-Rhine-Main rivers turned to be groundless and the trading on the rivers by barges or self propelled vessels became more free. The navigation on the Danube downstream to the Black Sea is still a bit handicapped due to the pontoon bridge at Novi Sad/Serbia and also to the existing bilateral agreements with the non EU countries based on flag protection.

In the last year the greatest task of our Association was to organise the Annual Meeting of FONASBA in Budapest during October 2004. which – thanks to assistance of FONASBA executives, to the help of the fellow associations with their experience who had the burden already to organise such meeting earlier, to the sponsors, to all members of FONASBA attending the meeting in a record number and at last but not least to the sacrifices of the management and all members of our Association – turned to be a success.

During the last twelve months we have expressed our opinion regularly on several drafts of the national government related to the shipping and transport industry, prior to presenting the Bill to the vote of the Parliament. Our Association has been represented on the meetings of FONASBA, ECASBA, MVVLSZ and MSZSZ and our representatives also attended the important local forums and seminars of the industry.

Member Association Report — IRELAND

Association: *The Irish Ships Agents Association*

Membership: 40

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Member of FONASBA

The Irish Ship Agents' Association is an internationally recognised body, representing ship agents in Ireland. It has a working Council of thirteen members with regular meetings throughout the year.

ISAA have two affiliate members, i.e. Belfast Shipping Agents Association and Irish Port Employers Association. A recent Council meeting was held in Belfast hosted by The Belfast Harbour Commissioners.

The Association has benefited considerably from the decision by the Department of Marine to officially recognise the Association as the national representative body for ship agents. Consultancy status was also conferred. Regular meetings have taken place between ISAA and the Maritime Transport Division of the Department of Marine when Association representatives are updated on intended developments.

ISAA provides two delegates for FONASBA's British and Irish Sub-Committee (BRISCOM). This reports to the international body on activities in the UK and Ireland range areas. The UK delegation to BRISCOM is supplied by the Institute of Chartered Shipbrokers, London. The last BRISCOM meeting was held in Dublin on 20 September 2005. Ireland currently holds the Chairmanship of BRISCOM.

A representative of the Association also attends regular meetings with the Irish Maritime Development Office.

Ireland's first Nautical College has been opened in Ringaskiddy, Co Cork and is very successful.

The Dublin Port Tunnel is nearing completion and is due to open in 2006.

As and from April 2006, Mr Pat Brennan, Vice-President, will take over the role of President of the Association and guide it over the next two years.

Member Association Report — ISRAEL

Association: *The Chamber of Shipping of Israel*

Membership: 48

Contact: *Mr. R. Zyk*

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The Chamber of Shipping of Israel has for over 70 years represented the shipping factors active in Israel. The Chamber is the sole body representing all interests of about 50 ships' agents, shipping companies and ship owners, which handle about 90% of all the cargo passing through Israeli ports - with Israeli government ministries, the Israeli Knesset and its committees, other institutions in Israel and around the world and, of course, with the Ports Authority.

The Chamber is promoting legislation which will grant it a statutory status, thus making it easier to represent the interests of all shipping bodies in Israel and abroad with the various authorities. The Chamber was active over last year and at the beginning of this year in improving the proposed law to reform the ports so that they recognize the needs and status of the shipping bodies in Israel and abroad. The Law was passed in the Knesset on February 17, 2005, and in practice, the law was improved by adopting some of the matters we had insisted on.

The Chamber acted this year to deepen awareness of the strong shipping sector in Israel and to nurture shipping bodies in general with a view to seeing shipping as an industry and not only a branch, and to promote recognition of the shipping industry's contribution to the Israeli economy. It has also put more emphasis this year on its goal to advance the approval of the development plans for the ports, in order to enable Israel in this way to successfully meet international and regional competition. The Chamber is working towards changing the attitude of international trade to recognize the ability of Israeli ports to serve as a regional trans-shipment centre.

Additional matters handled by the Chamber – efforts to arrange the authorization and licensing of ships' agents. Today the branch of ship agents is open to anyone who wishes to engage in it. The Chamber of Shipping, in cooperation with the Ports Authority and the Customs Authorities encourages a transition to electronic communications in daily work procedures with the customs and the ports on the one hand and with the commercial community on the other hand. In the field of security, the Chamber operates with the relevant bodies in order to ease the work procedures of ship's agents with a view to balance the interests of foreign trade and shipping with the steps required by the Security Authorities.

The Chamber is preparing also for government discussions on the reform of tariffs in the Israeli ports. In this subject, the Chamber requests first and foremost to determine that every change in the structure will be made only after consulting with the Chamber. Inter alia, the Chamber claims also not to impose in the framework of the tariff reform, in an unfair way, all the port expenses on the shipping companies. The Chamber of Shipping opposes the imposition of the costs of the reform in the ports on the shipping companies and demands that these expenses be paid from the budgets of the Ministries of Finance and Transport.

An additional task that the Chamber took on itself, is deepening the awareness of shipping in every possible arena, for example: The supply of gas to the state through ships and not only through pipes. The Chamber is active in the field of education and training of marine employees and shore employee to serve ships and is in contact with the Institute for Marine Training at the Haifa University, with the College of Management and with the Widra Institute for Shipping and Port Research. The Chamber is handling the contacts with other associations, such as: The Organization Users of Marine Transport, the Port Workers Trade Unions, the Standards Organizations at the Israel Standards Institute and more.

The Chamber encourages introducing service indices to measure the functioning of the ports and in this regard is in contact with the Ports Company and the Shipping and Ports Authority.

The Chamber has put as a target the adoption of an "ethical code" which will serve as a basis for a relationship between ships agents and will be part of the Chamber's Articles. The ethical code has been formulated and will be brought for approval at the general meeting of the Chamber to be held at the end of November 2005.

The Chamber is making strenuous efforts that the Coastal Shipping Law is passed and succeeded in having significant amendments made for the benefit of Israeli shipping and for the benefit of members of the Chamber.

Member Association Report — ITALY

Association: *FEDERAGENTI*

Membership: 580

Contact: *Mr. F. Camisetti*

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website: www.federagenti.it



Federagenti has maintained a high level of activity during the last year under the chairmanship of Umberto Masucci, who was elected as Chairman of the Federation in June 2004 at the annual meeting in Capri, near Naples.

Shipping activity in Italy has been growing steadily, even if the pace is not as satisfactory as it could be, especially when compared with other countries in the area. The growth of the Italian economy has not been good, mainly for structural reasons which are affecting our politics, the organization of labour, the infrastructures and, more in general, the capacity to create and develop new opportunities. This limited expansion is having a high impact on the economy and, as a direct consequence, on the movement of goods through the Italian ports, which are the nation's door to other countries.

Despite being in a pivotal position in the centre of the Mediterranean Sea, Italy is still often offering services which are not in line with the requirements of present time shipping lines as well as final destination or origin markets; costs are still too high and the number of bottle-necks limiting the capacity of ports and transit speed through the ports themselves are a big concern for our future possibilities, as well as the current ability to attract new traffic.

Federagenti has continuously been involved in promoting the improvement of our ports and transports systems in order to achieve a far higher standard of intermodal goods movement within Italy. We have been fully supportive of all initiatives aimed at modernizing the laws and regulations of the Italy, working in harmony with other organisations in the same field, such as Confitarma, the Italian Shipowners Association.

Federagenti comprises 25 federated associations covering all Italian ports, representing a total of 580 companies with approximately 8000 employees, which statistics will give a revealing insight into the number of people, and consequently of families and households, which are supported by our activity.

Federagenti has also been active in the operations of the Short Sea Promotion Office in Italy, as well as with the Italian Government on issues such as the European Commission's revised Port Services Directive.

Our Federation has worked in close cooperation with Italian port authorities on new port developments, in particular the major container terminals such as Gioia Tauro, Cagliari, Taranto, Genoa and La Spezia.

To end this brief report we also like to mention a new cooperative education and training project which is being developed with the Institute of Chartered Shipbrokers and its Distance Learning College, Tutorship. Federagenti hopes in the very near future to establish an Institute Distance Learning Centre in Italy and then to start providing education for our young generations based on the Tutorship courses.

Member Association Report — JAPAN

Association: *The Japan Association of Foreign Trade Ship Agencies*

Membership: 81

Contact: *Mr. E. Itoh*

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JAFSA is very active in protecting the interests of its members both within Japan and internationally. As the trade body for the Japanese agency industry, the association is in regular contact with Japanese shipowners on issues such as liner agents remuneration and the implications of the ISPS Code.

The Association is represented on a number of government committees covering maritime issues including

- Safe navigation and pollution prevention in Tokyo Bay
- The facilitation of EDI in ports and harbours
- Introduction of the IMO FAL Convention and standardised harbour documentation
- Measures to reduce air pollution by vessels
- Maintaining safe navigation in Tokyo Bay during construction work at Haneda Airport
- Simplification of harbour procedures

Membership of these committees gives JAFSA a vital means of communication with the government and industry and allows the association the opportunity to ensure the voice of its members is heard and their interests protected.

JAFSA also provides a service to assist redundant staff of member companies to find alternative employment.

Internationally, JAFSA is an active member of FONASBA and regularly reports to its members on the issues discussed, and action undertaken, by FONASBA in its various committees.

The President of JAFSA, Mr. Takazo Iigaki, was elected last year as FONASBA Regional Vice President for Asia with particular responsibility for expanding FONASBA's membership in the region. Whilst progress to date has been rather slow, we are pleased that a number of local associations have shown interest and we will be maintaining contact with them in the coming months.

The association was extremely proud to be selected to host the 2005 FONASBA Annual Meeting and we are looking forward to a very successful meeting. As part of our remit to expand FONASBA membership in Asia we have extended invitations to those associations that have indicated an interest in joining FONASBA and we hope that the meeting will provide an excellent base from which the Federation can expand in the region.

Locally, JAFSA arranges annual members' seminars at ports around the coast and we are now considering the possibility of opening these up to non-members. On the social side we also host twice-yearly events, including a golf competition. These events are very well-attended and serve to reinforce the personal relationships that are so vital to the success of our association.

Member Association Report — LITHUANIA

Association: *The Lithuanian Shipbrokers & Agents Association*

Membership: 50

Contact: *Mr. V. Viačekauskas*

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The Lithuanian Shipbrokers and Agents Association, (LLMAA), which celebrated its 10th anniversary this year, has 50 members, whose primary activities are ships agency, shipbroking, ship supply, crewing and ship management.

The association holds meetings every quarter. The membership fee is fixed and payable twice per year. A Code of Conduct for all association members was introduced in 2004.

Our association is a member of the Inter-Association Council, a forum which brings together other industry associations including stevedores, ship owners and shiprepair/shipbuilding companies. The chairman of the Council rotates on an annual basis between the Presidents of the member associations. The Council hosts a joint Christmas party, at which the members are joined by representatives of the port and city of Klaipėda as well as local and national politicians.

The LLMAA is also represented on the Port Development Council, under the chairmanship of the Lithuanian Minister of Transport.

The association is currently in the process of drawing up a quality framework for the agency industry and this will in due course be applied to all companies providing agency services in Lithuania.

The only Lithuanian port is Klaipėda. Annual cargo throughput amounts to approximately 21 million tonnes of which approximately 30% is oil products, 30% general cargoes and chemical products, 25 % containers and Ro-Ro and 15% wood products and raw materials.

Approx. 34% of cargo throughput is in transit, of which 15% is destined for Russia, 58% for Belarus and 27% for Ukraine and Kazakhstan. Container traffic is currently growing at approximately 25 % per annum, a growth rate which is expected to continue for another five years.

The port of Klaipėda became fully compliant with the requirements of the ISPS Code in July 2005.

The port administration and Lithuanian Transport Ministry jointly established a Short Sea Shipping Centre in 2004.

Lithuania is a member of the European Union and has a population of 3.5 million. GDP achieved 6.7% growth in 2004 and Lithuania's major trading partners are Scandinavia, Germany, UK and Russia.

Member Association Report — MEXICO

Association: *Asociación Mexicana de Agentes Navieros AC (AMANAC)*

Membership: 56

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The 56 members of AMANAC represent 99% of Mexican trade carried in liner vessels. The association is also represented in major Mexican ports where it supports the activities of its members.

During the year, AMANAC entered into negotiations with the port authorities with a view to reducing pilotage charges and implementation of new tariffs is now awaited. The association is also working with the Mexican authorities in order to eliminate regulations that distort trade and to simplify the procedures applicable to the shipping industry. AMANAC is also promoting the adoption of new standards aimed at regulating entry to, and enhancing the level of professionalism in, the agency profession.

AMANAC also represents its members in national maritime fora and this year took an active role in the First Seminar of Multimodal Runners, organised by the Interinstitutional Facilitation Committee. The objective of the seminar was to enhance awareness of the relationship between the various modes of transport available to shippers in Mexico and by doing so to maximise their use for increased efficiency in freight movement.

AMANAC also organises an Annual Shipping Congress, this year being the 11th meeting. The subject was "The Strategic Role of Mexican Ports in International Traffic" and topics under discussion included the importance of regulation in international traffic, the movement of goods to and from the United States and the interconnectivity between the east and west coasts of Mexico.

Trade Statistics

In the period January to November, total freight movement by sea amounted to 258,449,197 tonnes, according to figures released by the Secretary of Communication and Transport. Containerised traffic amounted to 14.4 million tonnes, an increase of 8.8% over the same period the previous year.

Port Developments

A multimodal runner is nearing completion at the port of Lazaro Cadenas, which is the primary point of entry to Mexico and thus the USA for cargo from Asia and it is expected that 300,000 containers per year will be on-carried to the USA. Approximately Pesos 28 billion have been invested in port developments across Mexico, with Pesos 60 million being allocated to a dredging programme at the port of Mazatlan to increase the draft available at the port.

Member Association Report — MOROCCO

Association: *APRAM, Association Professionnelle des Agents Maritimes, Consignataires de Navires et Courtiers D’Affretement du Maroc*

Membership: 30

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APRAM has undertaken a number of initiatives in the past year, as reported below :

Legislation of the Profession of ship agent and ship broker: Edition of APRAM legal survey

Last July, APRAM published the legal survey we have undertaken, with the assistance of a renowned counsel, on the shipping agency and ship brokerage bill. This survey has really contributed to the successful dialogue we had with the Marine Merchant Authority to reach by consensus texts complying with the general interest of the maritime transport industry. Texts are now in legislative process and should be passed by the end of this year. This edition in French language include all stages the above texts have followed from 2003 to 2005 in negotiations between APRAM and the Marine Merchant Authority. The edition also include analyses and critical observations on the Commercial Maritime Code Bill, namely the articles regulating the ship agent and shipbroker activities. The 500 copies edited are intended for sell to ship agents, counsels, as well as students.

ISPS Code Training:

On March 22/24 2005, APRAM organised training seminars on the ISPS Code supported by the French company SECOPEX. 72 staff of 28 members, based in all Moroccan Ports, attended these seminars.

Web Site of APRAM:

The Web Site of APRAM www.apram.ma is being improved. It is intended to enhance the quality both of its technological design and its content. With the view of better promoting our members, the Members section will give more accurate information on their activities in addition to contact details and logo.

Quality Standards and levelling actions :

APRAM this year continued its program of levelling actions. It aims at improving the competitiveness of our members so as to better face increasingly keen international competition. Initiatives included :

- Quality certification program for seven members whereof the certification is expected by next March 2006 bringing up the number of members certified ISO 9001.2000 to 20 companies.

Five other members are carrying out levelling actions about Strategic Diagnosis, Information System and Marketing strategy. Those actions have came out with the financial support of the National Agency for the Promotion of Moroccan SMC (small and medium companies) and of the European Commission.

Vocational Training

The vocational training program for APRAM’s members will be unveiled in 2006. Nearly 17 topics are covered relating to maritime transport, marketing, communication, computer science, language, and commerce. Companies registering for this program will save approximately 40% compared to the basic rate they could get individually.

Strategic Survey on the shipping agency and shipping brokerage profession in Morocco :

The strategic survey recently undertaken on shipping agency and ship broking in Morocco was very informative. It focussed on a number of areas including: analysis of market supply and demand and competition, evaluation of sector strategy and a survey of members expectations of APRAM itself. The findings of the survey will aid better strategic planning by our members and allow the association to undertake those actions which directly benefit our members.

Promotion actions :

In the first half of this year APRAM moved on April and then on May to two Ports Tangier and Agadir, located respectively in the north and in the south of Morocco. The meetings with the local ship agents, Port authorities and Port operators were successful. Two committees were constituted to deal with the existing problems. APRAM has then contributed to the improvement of the dialogue between ship agents and port authorities which will help to make their communication more fluid and their collaboration more concrete.

APRAM promotional leaflet :

We realized a promotional leaflet in French and English language to reinforce the communication of our Association and also to promote our members.

Member Association Report — ORAM, NETHERLANDS

Association: *Ondernemersvereniging Regio Amsterdam (ORAM)*

Membership: 42

Contact: *Mr. J. Stein*

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In the Amsterdam ports region, the sector ship agents of the Business Association Region Amsterdam (ORAM), also discussed issues such as the impact of the ISPS code, the pilot tariffs and the ship generated waste disposal directive. Although located in one country Amsterdam and Rotterdam port authorities have chosen a different approach to these matters. Besides these issues the following topics were of importance:

- the closure of customs offices,
- the development of the electronic communication system PortNet (more specific Electronic Port Clearance EPC),
- reducing the impact of government interventions (inspections etc.) in logistical processes

Through EPC ship agents and other interested parties in the Amsterdam ports area can communicate electronically with the customs authorities (to clear) and with the port authorities. With this development the Amsterdam ports run in front in other regions in the Netherlands. ORAM was one of the parties involved in the development of the system, together with the port authorities, the province of North Holland and the Chamber of Commerce. After a year the use of EPC will be evaluated.

ORAM has cooperated with the Ministry of Transport and Public Works in an effort to reduce the negative impact of government interventions in logistical processes, like veterinary inspections and custom controls. With the regional custom authorities a good working practice had been developed to solve day to day operational problems.

Member Association Report — VRC, NETHERLANDS

Association: *Vereniging van Rotterdamse Cargadoors (VRC)*

Membership: 115

Contact: *Mr. M.S.B. Duin*

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The association continued its close liaison with the Rotterdam Port Authority (RPA) during the year under review. Its consultation committees covering the container, bulk and ro/ro trades discussed issues of administration, commercial policy and future port development.

These included:

- the current and future format of the port charges structure
- the ability of the port to accommodate the next generation of container vessels
- competition from other ports in the region
- port capacity and congestion
- the impact of the ISPS Code
- environmental issues such as waste disposal reception facilities

VRC is also active in the development and implementation of electronic data interchange facilities both within the port and also externally. Electronic exchange of manifest information and vessel clearance is expected to be introduced through the Port Infolink system in June 2005.

Recognising the need to ensure the provision of an adequate supply of qualified agency personnel for the port of Rotterdam, VRC has assisted in the establishment of training course and revision programmes for ship agents in conjunction with the Rotterdam Shipping and Transport College. A course specifically aimed at those agents working in the tanker sector is also under development and is expected to be introduced in Summer 2005.

VRC was very closely involved with the introduction of the European Ship Generated Waste Disposal directive in Rotterdam. Unfortunately, certain of the provisions of the Directive, as applied in Dutch ports, are not conducive to the efficient operation of the waste disposal process in practical terms. For example, the exemption regime does not recognise that vessels calling in Rotterdam may have concluded appropriate waste collection contracts with other EU ports, or that vessels may have incinerators on board. It is clear that these issues have been recognised in other EU ports and VRC is endeavouring to level the playing field and a degree of success was achieved earlier this year when tariff reductions were agreed with the RPA. VRC will continue to work locally with the Rotterdam Port Authority and the Dutch maritime authorities to bring about the changes required and also with ECASBA to ensure that the views of its members are taken into account in the consultation currently being undertaken on behalf of the European Maritime Safety Authority.

VRC reactivated its Statistics Committee this year in order to press the Netherlands Statistics authority (CBS) to provide more timely statistics, and of a higher quality, than at present. VRC's efforts in this regard are supported by the RPA and both organisations are now in permanent consultation with CBS.

Beyond the port of Rotterdam, VRC maintains close links with relevant sector organisations. The complex and time-consuming tendering processes undertaken annually by shippers has led VRC to seek agreement with the Dutch shippers' association, EVO, for a standardised tendering process. Progress has been slow but VRC continues to press its case. Members concerns relating to certain aspects of the relationship with forwarding agents, including recovery of security charges and prompt payment of invoices, has led VRC to hold regular meetings with FENEX, the forwarding agents association. Issues relating to road transport, and in particular road carriage of containers, has resulted in regular consultations with the Sea Container Transporters Alliance, AZV.

A primary area of consultation is, of course, with the shipowners and VRC holds regular meetings with the Dutch shipowners association, KVNR, and the European association ECSA.

Outside the Netherlands, VRC maintains close links with the Belgian agents association, ASV, and both associations meet annually.

Member Association Report — NORWAY

Association: *Norwegian Shipbrokers' Association*

Membership: 75

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Membership / finances

The reduction of members that we have seen the last years has levelled out, much due to an active recruitment campaign undertaken by the local association in Bergen. This has, together with an increase in the membership fee of 5%, contributed to a stop to the decline in revenue generated from annual fees. Important revenue is also generated from the sale of **Saleform**. We still depend on revenue from the NORTRASHIP fund to balance our expenditure. Due to the fact that most of the fund's assets is placed in high yield bonds, the financial situation is somewhat better than the previous year

Meetings

We have arranged two meetings the past 12 months. The annual "Stjørdalseminar" was as usual held at Rica Hell Hotel near Trondheim the first week end in February. This is primarily a meeting for those members involved in coastal and short sea traffic and was attended by 58 delegates. Our annual meeting was held the week end 4 – 6 March on board the new Color Line vessel "Color Fantasy" between Oslo and Kiel. The meeting was a success, both in terms of venue as well as the meeting, seminar and social activities. The seminar was held by Øystein Hedstrøm (FrP), who is the deputy chairman of the Parliamentary Committee for Trade and Industry and Rikke Lind, who is the managing director of Maritimt Forum, and was called "Norwegian Shipping and the Opportunities Ahead". They managed to spur a good debate among the delegates at the meeting. It is still a challenge to attract as many delegates as we would like, and this year was no exception. All in all we were 123 people attending, which included accompanying persons.

External activities

We continue to enjoy a good co-operation with other maritime organisations. Maritimt Forum, the umbrella organisation for maritime companies and organisations, is very important in this respect. Working with and co-ordinating our approach to government and politicians through this organisation means a better chance for our views to be heard and taken notice of. We have participated in hearings in connection with the annual government budget proposal and appeared before the Parliament committees on trade/industry and transportation. We also enjoy a very good cooperation with the Norwegian Shipowners' Association in many fields, and have both formal and informal meetings with this and other organisations in order to discuss matters of common relevance for the maritime industry. The Norwegian Shipbrokers' Association is also represented on the board of Shortsea Promotion Centre Norway.

Internal activities

Our members use the association to get help and advice in various matters of a professional nature. This is done by our various sub-committees and secretariat as well as our legal consultant

Member Association Report — POLAND

Association: *The Polish Shipbrokers' Association*

Membership: 26

Contact: *Mr. J. Noga*

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website:



The main task of the association is to provide assistance to members in respect of their relationships with local authorities, trade partners and port operators. The association maintains two offices, in Gdynia and Szczecin, and these are now under the control of our newly elected Secretary, Mr. Jerzy Noga. The Council of the Polish association meets regularly, the frequency of the meetings being determined by the actual needs of the members.

Issues currently affecting our members include:

- The increasing number of line-owned agencies in the container trades
- The continuing demand from principals for the provision of ever-greater levels of service
- Downward pressure on agency fees, particularly in the liner trades
- The expansion of major liner agencies into non-core activities such as multimodal transportation, NVOCC and forwarding and logistics service provision
- The introduction of VAT
- Changes to customs procedures (SAD harmonisation)
- Harmonisation of customs reporting procedures between ship agents and forwarders
- The introduction of a new invoicing procedure by the port of Gdansk
- Restrictions on movement within Poland by seamen from India, Pakistan and the Philippines
- The invoicing of shipowners by the Sea Pilotage Company of Kolobrzeg
- The need to define general terms relating to shipbroking and ship agency activities

The combination of all these pressures, plus increasing costs — such the need to invest heavily in EDI, quality certification etc. — is causing considerable concern within the agency community. The situation is exacerbated by the complexities of Polish law relating to corporate administration which create difficulties in planning and cost control.

The need to take action on all these matters has ensured a very busy year for the association.

Member Association Report — PORTUGAL

Association: *Associação dos Agents de Navegação de Portugal (AGEPOR)*

Membership: 102

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As the national association of the Portuguese ship agents, AGEPOR represents member companies in all commercial Portuguese ports, including those in Madeira and the Azores.

With more than one hundred members AGEPOR is very active in protecting the interests of the ship agency profession both within Portugal and internationally, ensuring a high profile for the profession.

In Portugal, AGEPOR has been recognized by all Governmental bodies not only as a valuable interlocutor for all matters relating directly and indirectly to the shipping industry but also as an advisor and partner for some specific national projects such as helping to build a computer network system involving the various entities and also on all issues related to short sea shipping. In addition to being a member of the Portuguese Shortsea Promotion Centre, AGEPOR also provides the secretariat and, currently the President, and so plays an important role in the development of the national policies towards the sustainable development of this mode of transport.

Internationally AGEPOR is actively involved in all the activities of FONASBA/ECASBA, the European Shortsea Network and the cruise industry (Seatrade).

For many years, education and training have been priority projects within the Portuguese agency industry and AGEPOR has been developing and providing internal courses which are proving very successful within our membership and our aim for the future is to develop even more courses on specific matters such as commercial skills, etc.

Recognising that politicians, the mainstream press and the public are not aware of the importance to, and role of, the shipping industries to the national economy, AGEPOR has been lobbying hard for better recognition, at all levels, of the vital contribution that the industry makes, especially to a peripheral country such as Portugal. To this end, AGEPOR organizes an annual seminar and invites opinion leaders from different areas to speak about the importance of maritime activities in Portugal and how do they think it should be improved.

Finally AGEPOR is promoting professionalism within the ships agency industry in order not only to protect the interests of its members but also to guarantee their survival in the future.

Member Association Report — SLOVENIA

Association: *The Slovenian Ship & Freight Agents Assn.*

Membership: 22

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RECOGNITION OF THE INDUSTRY

In Slovenia, the Ministry of Transport has the right to set the terms and conditions applicable to companies operating as shipbrokers and ship agents but to date this right has not been exercised and so the industry remains open to anyone that wishes to operate in either capacity. The association continues to work with the Ministry with a view to introducing regulation but to date little progress has been made.

SHORT SEA SHIPPING

The association has also taken the lead in local action to establish a short sea shipping promotion centre and we were grateful for the guidance and support provided by both the European Commission and the Italian centre. Unfortunately, however, it was not possible to bring the Slovenian railway authorities into the organisation as they were already members of the Slovenian logistics cluster and were not prepared to commit themselves to the short sea body as well. We are continuing to press for their involvement as we believe it is vital for the success of the short sea venture.

ISPS CODE

Our association is represented on the Port of Koper's advisory committee for port security. In spite of our opposition, security charges are now being applied in the port, although these are currently restricted to containers. Introduction of the Code also brought with it some early problems with crew visas but the association, with the assistance of the local ITF representative, was able to rectify the issues to the satisfaction of all concerned.

NEW PASSENGER TERMINAL

The Port of Koper is in the process of developing a passenger terminal and the association is working with the port authority to develop the appropriate operational procedures ahead of the opening later this year.

E-CUSTOMS

The association is working with Slovenian customs on the introduction of electronic cargo manifests, the 24 hour pre-advise regime and the lodgement of IMO-FAL forms and port statistics. From the agents viewpoint, there is considerable concern that the entire cost of the project, including development of the required software, will fall on our members. We are therefore pressing the customs authorities, as one of the prime beneficiaries of the project, to contribute to the costs.

OTHER ACTIVITY

- The association, in conjunction with the Port of Koper and the Chamber of Commerce, produces the "Customs of the Port" information booklet.
- We also issue a manual for ship agents, which gives information on all aspects of port operations.
- The association founded, and continues to support, the "Propeller Club of the Port of Koper".
- We are also expressing to the Slovenian authorities the views of the agency community on the European Commission's draft Directive on Seaports and have given our support to the proposals to grant Authorised Economic Operator status to approved organisations.

Member Association Report — SOUTH AFRICA

Association: *The Association of Ship Brokers & Agents of South Africa*

Membership: 127

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The 127 members of ASABOSA cover all the major South African ports and also operate in Johannesburg, which is a major inland container clearance location.

In its role as the official and recognised mouthpiece for the nation's ship broking and agency industries, the association liaises on a regular basis with the South African government and maritime regulatory authorities, including the South African Ports Operations, the National Ports Authority, the South African Maritime Authority and the Black Economic Empowerment Forum. It also cooperates closely with the South African branch of the Institute of Chartered Shipbrokers, both on commercial issues and, equally importantly, in training the increasing number of new entrants to the industry.

Current issues on which ASABOSA is representing its members views include:

Investigating methods of re-attracting valuable Bunker business, some of which, has been lost to other Ports, due to various reasons, including high Port charges, slow pipeline pumping rates, shortage of Bunker Barges and congestion at some of the Bunker Berths, where liquid cargoes are also worked. Discussions and proposals are being held between ASABOSA / Port Authorities / the Oil Majors etc, to resolve these issues.

Reversing the loss of business to Ports Authority Dry docks, again due to high costs, but abetted by Dockyard inadequacies, which problems are also being addressed.

Alleviating poor cargo working performance, primarily at the Bulk Cargo Port of Richards Bay, which issue is also being dealt with by the Association, via a new forum, involving Agents / Shippers / Stevedores / Port Authorities, and the various Terminals, at the Ports.

Container handling problems, particularly at the main Port of Durban, are addressed by the Association, as well as Port Authorities, and Liner Principals, on an ongoing basis, and have resulted in far better handling performance than in recent years.

The National Ports Authority, recently revealed its proposals for Port Developments, at all the main Ports, but particularly Durban, and these reveal a keen and major commitment to improving all facilities with much expansion to handle forecasted additional cargo, particularly containerised. They are also developing a major new Port named Coega, situated between Port Elizabeth and East London. This will be a multi-purpose port to handle all cargoes, including containers.

The Association is constantly involved in discussions with the Port Authorities, at a very high level, and enjoys an excellent relationship with its Senior Executives, who realize the value of the Association to mutual benefit.

There remain problems as a result of inefficiencies and poor performance by Spoornet, the National Rail system, which used to carry much of the Republic's cargo from the hinterland to the ports, a service that is facing competition from road transport. ASABOSA is in discussion with the appropriate authorities with a view to rectifying the rail transport issues.

ISPS has been introduced to the Ports and apart from some weaknesses at certain areas, is working well and efficiently.

Member Association Report — SPAIN

Association: *Asociación Nacional de Empresas Estibadoras y Consignatarias de Buques*

Membership: 143

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Last February, the Ministry of Justice revealed the Draft Bill of Shipping, whose arts. 371 to 382 deal with the ship agent, defining this professional properly. The current regulation is included in the Third Book of the Code of Commerce, dating from 120 years ago, therefore it has become obsolete. As a consequence of the publication of this Draft Bill, the Spanish Association of Maritime Law, in collaboration with ANESCO and the Ministries of Justice and Economic Development as well as other prestigious organizations of the sector, organized an event on this issue.

Maritime industry organisations also met with the government on in December 2004 and April 2005 in the port of Valencia to bring about the implementation in Spanish ports of the International Code for Security of Vessels and Port Facilities.

As far as training studies are concerned, a basic training course on shipping business has been established in the Port of Barcelona for employees of local ship agents.

ANESCO also participated in the Shortsea 2005 event, organized in Bilbao by the publishing Group DVV, De Lloyd and El Vigia de Barcelona which covered all aspects of short sea shipping in the local and European context.

On February 24 and 25, a Seminar on Motorways of the Sea and SSS was held in the Port of Vigo, entitled: "Challenges of port cities facing Globalization", organized by the City Council of Vigo with the collaboration of the Port Authority of Vigo and Uniport Vigo.

Finally, ANESCO was also represented at the 2nd Symposium on Intermodal Logistics, held in the Port of Tarragona last June, which has been useful as a meeting point of the sector.

Member Association Report — SWEDEN

Association: *The Swedish Shipbrokers' Association*

Membership: 145

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General Shipping Climate

The last year has been good for the Swedish shipping industry. It has been an all-time high both for Swedish ports and for Swedish ship owners, all due to the global boom in shipping. The Swedish Parliament has also decided to put efforts into the possible introduction of tonnage tax and we will probably see the result next November.

Collaboration and politics

This has also been a meaningful year in terms of collaboration with Swedish associations for ship owners and ports. The main event though was the formation earlier this year of a national transport network bringing together all the major transport associations. The aim is to replace quarrelling about which mode is the best with constructive discussions to find the best solution for industry and the environment.

In April the Department of Transport invited the Transport Network to a seminar in Parliament to plan a sustainable traffic policy. All together 150 attended the meeting. Berit Blomqvist was one of the speakers and the day was considered a great success. A Government Transport Proposal is to be issued shortly, which should bring cheaper fairway dues to Swedish waters.

Education

Education is a further major action area for the Association. Last year the Association launched a Distance Learning Centre under the Institute of Chartered Shipbrokers in London.

In the first academic year there were 30 students, 15 studying for the Foundation Diploma and 15 for the Examination Qualification. This was a very satisfactory number. Such training and education programmes are key to raising the profile of shipbrokers and have been very effective in Sweden.

Members' meetings

There have been two over the past year. 65 delegates attended the Association's autumn meeting. The agenda included EU Competition law, insurance and new customs rules in Sweden. At the AGM in April, which was attended by 110 delegates, all members of the board were re-elected.

Maritime Administration and the Swedish Coast Guard

The pilot fee went up 20% on 1 July 2004 and another 10% on 1 July this year. The Maritime Administration has now declared that there will be no further increases for a while.

The Swedish Coast Guard have caused the port agents a lot of problems since last spring when they adopted a zero-tolerance policy for the late submission of mandatory Schengen forms. As we know, all forms have to be presented 24 hours in advance and the Coast Guard now report every single late submission to the police authorities. A lot of port agents are concerned about this because they object to being questioned by the police when they are only doing their jobs. Some agents have even been reported for submitting an incorrect ETA when the ship's delay has been due to a shortage of pilots, a fact that was clearly unknown when the form was handed in. The Association is currently working hard on this issue.

Legal issues

Arbitrators have recently ruled in favour of a Swedish port agent, accused by a Swedish port of allowing non-environmentally friendly ships to pay a reduced port fee, intended only for environmentally friendly ships. The port accused the port agent of not checking the Statement of Facts adequately and claimed repayment of the money they had "lost". In July the Arbitrators ruled that the port agent, as we all know, is only the intermediary and any further claims are to be addressed directly to the ship owners.

Member Association Report — TURKEY

Association: *The Istanbul & Marmara, Aegean, Mediterranean, Black Sea, Regions Chamber of Shipping*

Membership: 330

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The Turkish shipping industry has undergone significant change over the past year, largely driven by government action in the sector.

REGULATION OF SHIPS AGENTS

In June 2005, the Undersecretary of Shipping issued “Draft Shipping Agents Regulations” for industry consultation. The association has commented on the proposals and is now awaiting further developments.

AGENCY FEES

A number of changes have recently been made to the port charge tariffs applicable in Turkish ports and, in parallel with these, the Union of Chambers of Commerce and Commodity Exchanges of Turkey has delegated to the task of setting agency fees to the Turkish Chamber of Shipping. In another development, significant reductions in agency fees are being granted for high-volume container movements.

PORT PRIVATISATION

The ports of Mersin, İskendurun and İzmir are currently in the process of privatisation and it is expected that notices relating to the commencement of the privatisation process for the ports of Derince, Bandırma and Samsun.

PORT DEVELOPMENT

The new port of Pendik, the largest ro/ro port in Europe and the fourth biggest in the world, opened in April.

CABOTAGE

The Turkish Government is undertaking a study of the current cabotage arrangements in place for coastal shipping, with a view to establishing baselines for current operations and investment programmes and for identifying issues relating to future development, including targeted investment plans, fleet modernisation, port and infrastructure development. Modernisation of the fleet is an area of particular concern to the industry, as the Turkish flag fleet is, to a significant degree, overage and sub-standard. Given the extended coastline, the need for an efficient, modern and safe coastal fleet is paramount

EU CANDIDATE MEMBERSHIP

The Turkish Government is currently consulting with industry on harmonisation of local regulations and practices with those applicable in the European Union and is now providing information to the European Commission in advance of further talks on the membership application.

MARMARA STRAIT TANKER TRAFFIC

Tanker traffic through the Marmara Straits continues to increase, with transits rising from 4,456 in 2004 to an expected 4,560 in 2005, an increase of 12%. Overall transits of the Strait increased by 4%. The association is in discussion with the Undersecretary of Shipping with regard to proposals to reduce the waiting time for vessels transiting the Strait following the establishment of a one way traffic scheme in August 2005 in connection with the Marmara Project.

Member Association Report — UNITED STATES OF AMERICA

Association: *The Association of Ship Brokers & Agents (USA) Inc.*

Membership: 169

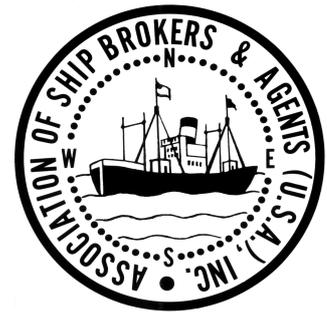
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The Association of Ship Brokers & Agents (ASBA) was established in 1934 to advance and foster ideals and standards of personal and professional conduct and practices, to inculcate just and equitable principles among those engaged in the trade, to define customs of the business, to establish and maintain uniformity in commercial usages, to adjust controversies and misunderstandings, and to promote the common interests of those business establishments which are engaged in business as ship brokers and agents.

The Agent Members of ASBA completed the “Agent Member Certification” process by submitting to all components of the member approved Guidelines for Certification, check our website for full details. All agent members are required to submit an annual “Agreed Upon Procedures Report” prepared by an external Certified Public Accountant that attests to proper handling of principal’s funds by confirming amounts due to and from principals are supported by detailed accounting/reporting, listing of cash receipts, disbursements, invoices and receipts and that separate files are maintained by principal. Members must also submit proof of adequate insurance coverage with a minimum of liability coverage of \$1 million per event. The final component of the certification process was completed in June of this year when all member boarding agents and their direct managers passed an entry level agency exam administered by ASBA. Approximately 500 agents successfully completed this exam which earned the ASBA Agent Member their certification and the privilege of including the “Certified Agent Member” logo (see below) on their letterhead and website. ASBA has begun the process of promoting the appointment of our agent members to the ship owner and brokerage communities. It should be noted that ASBA Certified Agent Members handled over 39,000 of the approximately 72,000 vessel calls in the US in 2004. All new agent members have up to 6 months to submit to all the requirements of the certification process.



Since 9/11, the maritime community has been inundated with new regulations implemented to better secure US borders. ASBA has worked along side US government agencies charged with this mission, meeting with and providing maritime industry concerns to those responsible for writing and implementing new regulations, namely the US Coast Guard and Customs and Border Protection. The ASBA Secretariat has acted as a conduit between ASBA members and USCG and CBP headquarters. This has been particularly important considering the recent implementation of new regulations like Automated Manifest System and Electronic Notice of Arrival/Departure for crew manifesting.

The ASBA Annual Cargo Conference, now in its fourth year, continues to grow in popularity. The conference committee works diligently to present a program with a broad range of speakers. Delegates enjoy the benefits afforded by the conference size, averaging just over 100 delegates, as well as sponsored social events which provide ample time to fraternize with the speakers and other delegates.

Member Association Report — VIETNAM

Association: *The Vietnam Shipagents and Brokers Association (VISABA)*

Membership: 30

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During 2004/5, Vietnam had made significant strides economically, for example, GDP increased by 7.5% and is expected to reach the government's target of 8.0% in 2005/6.

Vietnam today pursues a policy of international cooperation and is improving its links with other countries in the interests of improved international integration.

The next step in this process is an application to join the World Trade Organisation, which the government is actively pursuing.

In concert with the overall economic developments, the Vietnamese shipping industry continues to expand. Container throughput continues to increase every year and in 2004 reached 2.4 million TEU. Cargo movements at non-container ports also increased, as did activity in the agency, broking and maritime service sectors, all of which saw an increase in the number of companies operating in those fields. These sectors currently comprise state-owned, joint-stock and private companies.

As the only association representing the agency and broking industries in Vietnam, VISABA has enjoyed a busy and productive year. The General Congress held in October 2004 saw the election of a new committee and the establishment of a development plan covering the period 2004 — 2008. In addition, VISABA is in discussion with the Vietnamese Government in respect of changes to mercantile law and on other legal issues. The association has also provided professional and educational assistance to its members, with notable success.

For further information on FONASBA,
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