

THE FEDERATION OF
NATIONAL ASSOCIATIONS OF SHIP
BROKERS AND AGENTS



FONASBA



FONASBA

ANNUAL
REPORT

2006/7

*Cover Photograph:
Marrakech, Morocco, host city for the 2006 FONASBA Annual Meeting (photo courtesy of Mrs. Hilary Barclay)*

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INTRODUCTION
By the President of FONASBA
Mario J.L. Froio



In writing this introduction to our third Annual Report I have been looking back at the activities of FONASBA over the past year and it was inevitable not to think of how our Federation was when I first participated in an Annual Meeting, back in 1998, in Lisbon. At that time, Brazil and South America were just far away places, to say the least, for most of our membership composed mainly of European associations. Most of the issues discussed were then linked to European interests.

Almost 10 years later, with our Annual Meeting in Buenos Aires coming up and over the five years since FONASBA held its first South American Annual Meeting - in Rio de Janeiro in 2002 - it is very clear that we have made significant progress in positioning our Federation as THE voice of the international agency and broking sectors in all the corners of Earth where shipping has any importance. This was recognised in November 2006 when, as we hoped, FONASBA was granted consultative status with IMO. Although this honour still requires final endorsement by the Organisation's assembly at its meeting in December this year, we are already playing an active role in its work.

In the same vein our European Committee ECASBA continues to develop its links with the European Commission and is now one of the primary consultees on any proposals relating to the maritime sector. The influence of Brussels extends way beyond the borders of Europe and so it is vital for all of us in FONASBA that we maintain this relationship at the highest levels. The extensive report by ECASBA Chairman Gunnar J. Heinonen on pages 15/16 provides ample proof, were any more needed, of the value of the relationship with the Commission.

Formed shortly after the Rio de Janeiro meeting, the Inter-American Association of Shipping Agencies, CIANAM, also functions as FONASBA's American range committee. From a modest start this organisation now comprises the FONASBA members in Argentina, Brazil, Mexico and Uruguay and since earlier this year, the United States, together with the associations in Chile, Paraguay, Peru and Venezuela. CIANAM is already proving to be a very effective organisation and has enjoyed significant success in raising the profile of the agency and broking industries in the region through high-level contacts with governments and maritime administrations.

Our membership also continues to expand and in the last twelve months we have welcomed new members in Mauritius and Sudan. Although both are currently Associate members, we will be encouraging them to go forward and form new national associations, and thereby to further enhance FONASBA's international coverage and influence.

So I am pleased to have been able, in my first year as President, to oversee a continuation of the excellent progress that FONASBA made under my predecessors and will make every effort to carry this on into my second year, always with the help of my colleagues in the Executive Committee and all the other sub committees, without whom my job as President would be impossible.

MARIO J.L. FROIO
PRESIDENT

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



Another year has passed and once again FONASBA can look back with considerable satisfaction on further progress and achievement on behalf of its members.

The highpoint of course was the granting, in November 2006, of consultative status with the International Maritime Organisation. This has recognised the significant, and growing, importance of the agency and broking sectors to the maritime industry as a whole and now allows FONASBA the opportunity of influencing the development of maritime rules, regulations and legislation at the highest level, whilst at the same time ensuring that the interests of our members are promoted and protected to the best of our ability. With the levels of access we now have to the legislators in IMO and the European Commission we are in a position to ensure that our views are taken into account and that our contribution to the industry is accorded the value and recognition it rightly deserves.

Within IMO, FONASBA is already working with other industry organisations, including INTERTANKO and BIMCO, in the Port Reception Facilities Working Group that has been tasked by IMO's Marine Environment Protection Committee with improving the processes and procedures for the delivery of ship-generated waste to shore facilities. This is of course an issue on which the European Commission has been working on for some years now and on the back of ECASBA's work on the recent European consultation — and its contribution to INTERTANKO's Poseidon Challenge (see Philip Wood's article on pages 17 and 18 — FONASBA has been nominated by the PRF Group to liaise with the Commission on this subject. We will therefore be meeting with the Commission in September in order to take the issue forward on both fronts.

FONASBA is also committed to enhancing the already high quality standards in our sector and to this end the Annual Meeting in Buenos Aires in October will, we hope, ratify the draft FONASBA Quality Standard for agents and brokers. Unique in that it has been developed by, and for the agency and broking industries, rather than adapted from outside, we hope that in time this will become the benchmark by which our sectors are judged.

ECASBA continues to work very closely with the European Commission on all the issues that affect our members, including the port and maritime policy consultations, customs and environmental issues and these are reported in greater detail on pages 15 and 16. Our second Brussels seminar, during which ECASBA members exchanged views with Commission policy-makers, was a major success and plans for the third, to be held in May 2008, are already underway.

Finally, FONASBA's website has been upgraded and improved over the past year and now includes a members area — where documents that are too large for distribution by e-mail, such as presentations, or are for restricted circulation can be downloaded — and an interactive map providing details of our members worldwide. Development of the website is on-going and new features will be added in the coming months.

Certainly much has been done, but much still remains to be done and so we have another busy year ahead of us. I therefore look forward to being able to report more progress and more action in the next issue of the Annual Report.



FONASBA MEMBERSHIP BY COUNTRY (at August 2007)

(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
Mauritania (A)	Teissir Shipping SA, NOUAKCHOTT
Morocco	APRAM, Casablanca
Senegal (A)	Thocomar Shipping Agency, DAKAR
South Africa	SAASOA, DURBAN
Tunisia (A)	GENMAR, TUNIS

ASIA

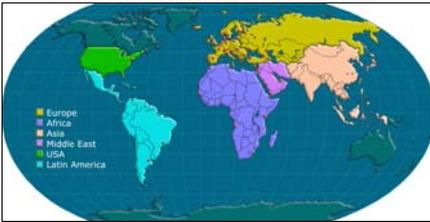
Japan	JAFSA, TOKYO
Mauritius (A)	Southbond Shipping Ltd., PORT LOUIS
Mauritius (A)	MSC Coraline, PORT LOUIS

AUSTRALASIA

Australia	Shipping Australia Ltd., SYDNEY
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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
Denmark (C)	BIMCO, BAGSVAERD
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
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



FONASBA MEMBERSHIP BY COUNTRY (at August 2007)

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

EUROPE, contd..

Lithuania	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
Poland (E)	The Polish Shipbrokers Association, GDYNIA
Portugal (E)	AGEPOR, LISBON
Romania (E)	Asociatia Agentilor Si Brokerilor de Nave di Romania, CONSTANTA
Russia	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

MIDDLE EAST

Dubai	The Dubai Shipping Agents Association, DUBAI
Israel	The Chamber of Shipping of Israel, HAIFA
Sudan (A)	Sea Pride Enterprises, PORT SUDAN
Yemen (A)	Middle East Shipping Co. Ltd. HODDEIDAH

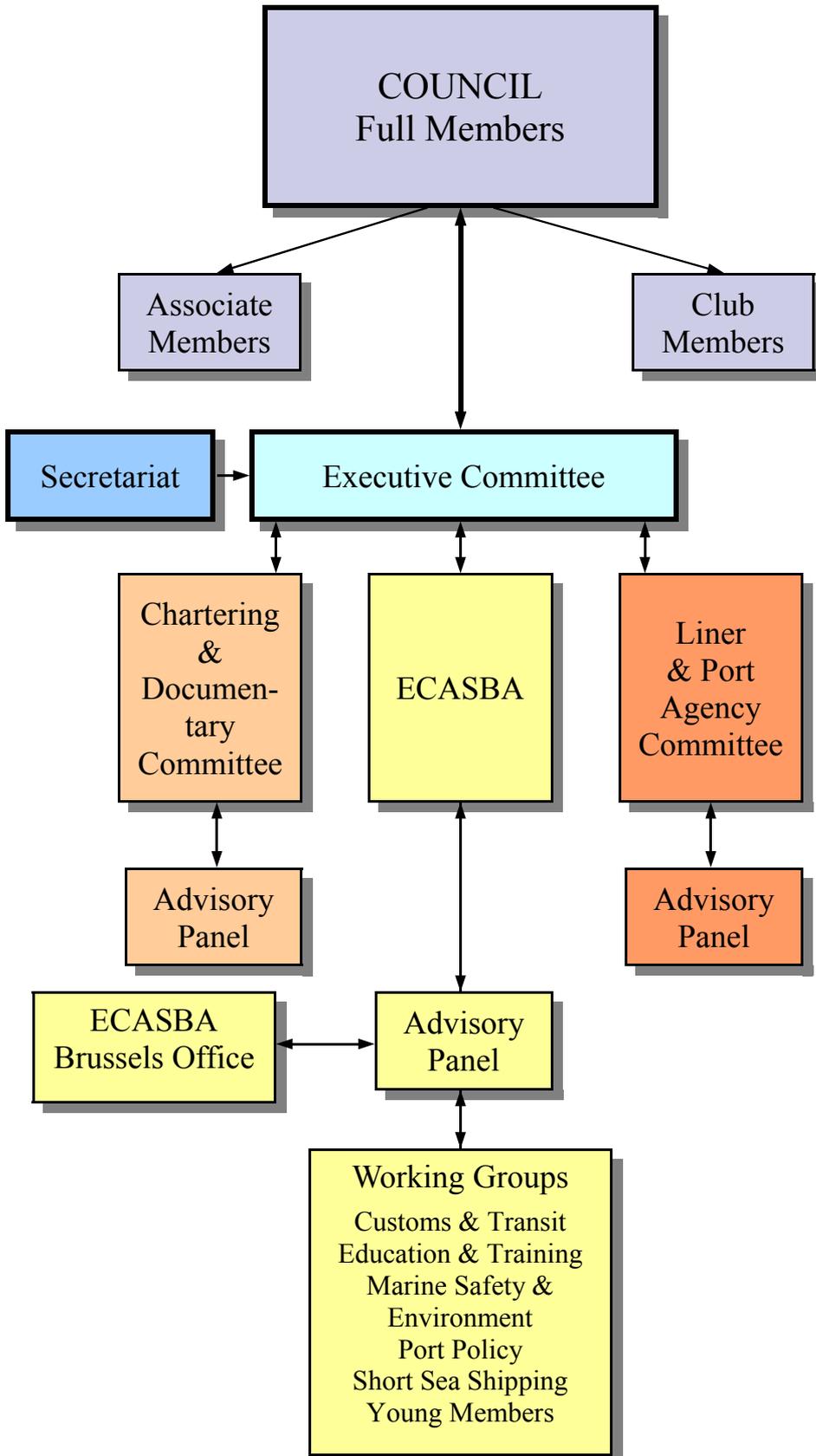
SOUTH AMERICA

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 2006/8**PRESIDENT**

Mario J.L. Froio, Brazil

EXECUTIVE VICE-PRESIDENT

Chris P. Papavassiliou, Cyprus

PRESIDENT DESIGNATE

Tonny Dalhoej Paulsen, Denmark

IMMEDIATE PAST PRESIDENT

Philip J. Wood FICS, Great Britain

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: Charles Génibrel, France

COMMITTEE VICE-CHAIRMEN

Chartering & Documentary: Marygrace Collins, USA

ECASBA: Antonio Belmar da Costa, Portugal

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.

FONASBA STANDARD DOCUMENTS

As part of its service to the wider agency and broking community, FONASBA has developed a series of standard documents, the purpose of which is to provide information and guidance on relevant issues. A list of the current Standard Documents is provided below.

The Agency Agreement documents can be used in their entirety or as the basis for in-house agency contracts in the liner trades and the Standard Port Agency Conditions acts as a checklist for the establishment of a contractual arrangement between an agent and a principal in the tramp trades. The various clauses and codes are provided as a guide to the interpretation of various charterparty clauses and to clarify certain potentially contentious issues.

Those documents are provided free of charge and those marked with **D** are available for download from the FONASBA website, www.fonasba.com. For those not available for download, please contact the FONASBA secretariat.

FONASBA Standard Liner & General Agency Agreement — approved by BIMCO **D**
A combined document for the establishment of a liner and general agency agreement

FONASBA Standard Liner/FONASBA General Agency Agreements — approved by BIMCO **D**
Separate documents for the establishment of a liner agency agreement (principal and specific agent) or a general agency agreement (principal and general agent). Both now combined into the SL&GAA above.

FONASBA Standard Port Agency Conditions — **D**
A concise guide to the rights, responsibilities and liabilities of the owner and agent in a tramp agency agreement.

FONASBA Sub-details Clause — approved by BIMCO **D**
Clauses for insertion in firm offers or bids made at the time of the charter negotiations

FONASBA Time Charter Interpretation Code 2000 — **D**
A code to assist in the interpretation of existing time charterparty clauses, and to assist in dispute resolution.

FONASBA Sub-Agency Agreement — approved by BIMCO **D**
A standard document for the appointment of a sub-agent.

FONASBA International Brokers Commission Contract — recommended by BIMCO **D**
A standard form of agreement between the shipbroker and the shipowner for payment of commission.

FONASBA/ITIC ISPS Code Clause — **D**
A clause setting out the limits of an agent's liability for the forwarding of ISPS Code compliance information between the vessel and the relevant shore authorities. Developed in conjunction with ITIC.

ANOTHER YEAR OF POSITIVE PROGRESS IN EUROPE

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



This year the primary focus of Commission activity, as briefly mentioned elsewhere in this publication, has been the year-long consultations on port policy, led by DG-TREN, and the overarching maritime policy initiative, colloquially known as the “Green Paper”, being carried out by the Task Force under the direction of Commissioner Borg of DG-FISH.

PORT POLICY

ECASBA has been playing an active part in the Commission’s attempts to develop a Europe-wide port policy framework since its inception in the late 1990’s and continues to receive, review and comment on DG-TREN’s proposals as they affect our members. With the demise of the 2nd port package, the Commission began, in June 2006, a year long industry consultation on its replacement which included, for the first time, a series of workshops, held in ports around Europe, at which industry organisations could make presentations. Each workshop was themed on a specific area of the port policy debate and European consulting associations were invited to make presentations at the workshop appropriate to their specific areas of interest.

ECASBA was represented at all six workshops and made a presentation at the Naples workshop on hinterland connections, logistics and administrative services. This not only gave ECASBA the opportunity of promoting its views on what should — and should not — be included in any future port policy but also to inform the wider European industry of the vital role the agency community plays in the efficient transport of goods across Europe. Echoing the views expressed by other organisations, ECASBA stated its opposition to further regulation in the port industry, calling instead for better and more consistent application of existing laws and regulations including, where appropriate, the Treaty of Rome. Urgent action on state aid is also required to ensure that a level playing field can be achieved and therefore to allow ports to fairly compete with each other.

One contentious issue was the Commission’s proposal to develop an electronic means of passing information between the ship and shore. Clearly this has implications for our agent members and ECASBA expressed its significant concerns in this regard.

The formal consultation process was brought to a close at the ESPO Annual Meeting in Algeciras at the beginning of June and ECASBA was offered the opportunity of briefly summarising its formal position. The Commission is now expected to issue a consultation in paper in October and ECASBA looks forward with interest to the contents.

FUTURE MARITIME POLICY

Running parallel to the port policy consultation has been that on Commissioner Borg’s over-arching maritime policy initiative. Again ECASBA has been working closely with the Commissioner’s staff and the Maritime Policy Task Force and in addition to providing an extensive written opinion has also held a number of direct meetings on the wide range of subjects covered in this ambitious project. One of ECASBA’s fears throughout this consultation — and indeed in the port policy debate — has been the potential for the environmental lobby to seize the initiative and early evidence indicates that this very well-organised lobby has made some progress in getting environmental issues to the top of the agenda, to the exclusion of commercial concerns and ECASBA is joining forces with DG-TREN and other industry organisations in trying to redress the balance. The Common European Maritime Space concept, particularly insofar as it aims to

ANOTHER YEAR OF POSITIVE PROGRESS IN EUROPE

grant the same administrative freedoms to intra-European sea transport as currently enjoyed by road, has received our cautious support, although we will want to see more concrete proposals before committing ourselves totally. Again a communication on the Future Maritime Policy is expected in mid October 2007 and as soon as this is available ECASBA will begin to develop its position.

OTHER COMMISSION ACTIVITY

Although these two major projects have occupied much of our time over the past year, ECASBA has maintained a close interest in the activities of other units within the Commission and has reacted accordingly.

CUSTOMS & TRANSIT

DG-TAXUD continues to try and develop a workable 24 hour Advance Cargo Notification rule for European ports but is coming under considerable pressure from a number of shipping lines to introduce the same system as that operating in the US. Whilst this will be advantageous in terms of interoperability with existing carrier systems, the Commission is aware of a number of shortcomings and is keen to avoid perpetuating them in the European system. Unfortunately the Authorised Economic Operator programme, which initially held out the prospect of significant tangible advantages for quality service providers, has now been considerably watered down to the stage where it is no more than a quality label—an excellent opportunity missed. Notwithstanding the lack of any specific benefits for our members, any company not accredited to the AEO programme will be at a significant commercial disadvantage and so ECASBA is encouraging all its member companies to apply for accreditation at the earliest possible opportunity.

SHORT SEA SHIPPING/LOGISTICS

The Commission continues to promote the increased use of short sea shipping and integrated logistics solutions but, as we have stated on a number of occasions previously, is failing to provide adequate support. The Commission has recommended that, given the importance of short sea shipping to the logistics chain, the current network of short sea shipping promotion centres should also take on the role of promoting logistics services. This increased workload comes in spite of a number of centres experiencing considerable difficulty in securing funding for their current activities, without taking on any more. Furthermore, and in spite of the obvious link between the two sectors, the Commission has now moved logistics away from short sea shipping in its own internal structure. ECASBA has strongly criticised the Commission for both of these actions but so far nothing has been put in place to either provide the support or ensure closer integration between the sectors. A Commission communication on logistics is also expected in October.

ECASBA BRUSSELS SEMINAR

The success of the first Brussels seminar in June 2006 led to a second event being held in May this year and whilst attendance was somewhat lower than had been expected, we received excellent support from the Commission, with Dirk van Vreckem, adviser to the Deputy Director General of DG-TREN, Jean Trestour, Head of Unit responsible for transport policy, ports and short sea shipping, Maria-Manuela Cabral, Head of Unit Customs Policy and Paul Nemitz, Deputy Head of the Maritime Policy Task Force all making excellent presentations. The Third ECASBA Brussels seminar is already in the early stages of planning and we hope this will take place in May 2008.

All in all it has been a busy, but very successful year and ECASBA has continued to ensure its voice is heard within the Commission on the relevant issues. We now look forward to the coming year, and in particular the communications on port and maritime policy due in October, with interest and anticipation.

***THE POSEIDON CHALLENGE —
FONASBA'S CONTRIBUTION TO
THIS MAJOR INITIATIVE***

***Philip J. Wood FICS
Immediate Past President***



As reported in last year's Annual Report, in 2006 FONASBA committed itself to supporting our Club Member INTERTANKO's major industry initiative, the Poseidon Challenge. As Philip Wood was President at the time, and is a tanker broker by profession, it was fitting that he both made the commitment on behalf of our organisation and also led our efforts to play an active role in taking the project forward.

Here he reports on the thinking behind our contribution and the outcome of our actions:

FONASBA is pleased to support INTERTANKO's Poseidon Challenge to strive to achieve the Three Zero's: Zero Fatalities, Zero Detentions and Zero Pollution. Whereas such a target could be argued to be an impossible dream, Stephen Van Dyck, Chairman of the Poseidon Challenge, points out that if the goals are not sought they have no chance of being achieved.

Following our commitment to the project, FONASBA soon realized that whilst agents and brokers may not be at the 'coal face' for the achievement of the Three Zero's, they are in a special position to acquire information with respect to the services available in their local ports, particularly with regard to the reception facilities for slops and other unpleasant liquid substances that tankers need to discharge at regular intervals.

The absence of such up-to-date, accurate information may encourage the tanker operator to, legally or illegally, discharge such liquids at sea with the consequent pollution consequences. The good agent will be the source of useful information to enable the tanker operator to plan his port call efficiently, thus an emphasis on slop reception available, or indeed not available, at the port is an important piece of data.

FONASBA's pledge to the Poseidon Challenge in Singapore in March 2006 was to establish a Guide to Port Reception Facilities for tanker vessels within our members' countries. That of course leaves a number of areas which are not covered but if first we deal with our own, we can then see what can be achieved elsewhere.

All FONASBA associations received a questionnaire and many responded. In addition we established communication with INTERTANKO who had a database of similar data for a number of ports and our joint information is now pooled and available to members of both organizations.

Coinciding with the INTERTANKO event in Houston, March 2007, FONASBA published the 1st Edition of the Guide to Tanker Port Reception Facilities which includes all the data provided by our members. In another concession to environmental protection, only one hard copy was produced and this was presented to Stephen Van Dyck at the meeting; for the rest of us it is available on the FONASBA web site.

The initial version was very well received but it is clear that by its very nature this is only the beginning.

Our work to date has also revealed that there is, at least between charterers and terminals, some confusion as to the role of the terminal and the facilities provided – or that should be provided — for receiving slops from tankers. The next step is for FONASBA to clarify these requirements, particularly in respect of the obligations under MARPOL, and by doing so assist our members in the collection of data.

THE POSEIDON CHALLENGE

We also need to address the issue of how we circulate the information to interested parties. As it stands at the moment the ability to look at the FONASBA or even INTERTANKO web site may not be much assistance to the Master or operator of a tanker. Thus much still needs to be done on the collection, clarification and publication of the information.

As mentioned on the previous page, it soon became clear that this project must be sustained and we are now preparing to circulate our members for information for the second edition, due for publication to coincide with the 2008 INTERTANKO Tanker Event in Istanbul. At the same time as reviewing and updating the reception facilities data, we will also be looking at ways by which we can enhance the content with additional information to make the publication even more useful to the tanker operating industry and all the ancillary operations that surround it.

FONASBA is extremely proud to have been able to make a worthwhile contribution to this vitally important shipping industry initiative and looks forward to continuing to work with INTERTANKO on this project in the coming years.

**INTERTANKO****Poseidon
Challenge**

FONASBA ANNUAL MEETING 2006

FONASBA's 2006 Annual Meeting was held in Marrakech, Morocco, hosted by APRAM. Due to the Ramadan holiday, the meeting was held slightly later than usual at the very end of October and into the first few days of November so the brilliant blue skies and temperatures in the upper twenties were extremely welcome, particularly to those delegates arriving from northern latitudes.

Clearly the prospect of excellent weather, combined with the opportunity of visiting the famous Red City, found favour as 124 delegates and partners arrived, making this one of the best attended meetings in recent years.

As is traditional, the work programme opened with the ECASBA Advisory Panel and Executive Committee meetings, followed by the plenary meetings of ECASBA and the Liner & Port Agency and Chartering & Documentary Committees and finishing with the Council Meeting. As in Tokyo the meeting also included a seminar, this year focussing on the current business developments in Morocco, during which delegates and accompanying persons were addressed by senior members of the Moroccan government.

The ECASBA Plenary Meeting opened with a comprehensive overview of European maritime developments delivered by ECASBA's Brussels representative, Diego Teurelinx. This year, and in response to requests from members based outside Europe, Mr. Teurelinx included a brief overview of the Brussels legislative process, explaining the difference between the various instruments — Directives, Regulations, Green and White papers — and how the various bodies, including the Parliament, Council of Ministers, Commission and Member States, work together to bring about the changes in legislation.

The meeting then discussed the main European policy issues that affect FONASBA members, including port security, the 3rd Maritime Safety Package, customs developments, logistics, short sea shipping, the mid-term review of the Transport White Paper and, most importantly, the two long-term consultations on port and maritime policy, the latter being known as the "Green Paper". The initial discussions on these latter two subjects started the internal consultation process that led to the development of ECASBA's formal position papers. *More detailed information on ECASBA's activities over the past year can be found in the ECASBA Chairman's report on pages 15 and 16.*

The main topic for the plenary meeting of the Liner & Port Agency Committee was the development of the proposed FONASBA Quality Standard for Agents and Brokers. With the active support of the membership having been confirmed, the overall aims and objectives of the project were discussed and agreed. It was felt that the standard must be directly relevant to the activities, rights, responsibilities and particularly the liabilities of the professions, suitably robust to enable it to secure the support of major international maritime industry organisations such as BIMCO, INTERTANKO and — possibly — IMO but at the same time sufficiently easy to administer through the national associations. The draft standard will be presented to the membership for consideration at the 2007 Annual Meeting in Buenos Aires.

The meeting was also updated by President Philip Wood on INTERTANKO's Poseidon Challenge and on FONASBA's contribution to the project, a survey of port reception facilities for tankers in all member states. He said that the lack of such a survey was keenly felt by tanker owners and operators and that FONASBA had the breadth of membership to be able to provide a comprehensive survey. He warned, however, that the project, once it started, would be on-going and so members would be asked to update their entries on an annual basis. The first issue would, he said, be presented at INTERTANKO's Houston Tanker Event in March 2007. *A full report on the Poseidon Challenge by Philip Wood appears on pages 17 and 18 of this report.*

The close of this meeting marked the retirement from FONASBA of John Good FICS, who had been Chairman of the Liner & Port Agency Committee for many years and delegates showed their appreciation by giving him an standing ovation.

FONASBA ANNUAL MEETING 2006 contd./...

The Chartering & Documentary Committee was given added support by the attendance of BIMCO Documentary Committee Chairman John Tsatsas and Deputy Secretary-General Søren Larsen. The meeting was also the first for the newly-appointed committee Vice-Chairman Marygrace Collins, from the USA.

The meeting opened with reports from the chartering market sectors and on the activities of the Documentary Committees of both BIMCO, provided by Mr. Tsatsas, and INTERTANKO. These were followed by debates on the rights and wrongs of signing documents “as agents only” and also on the need for agents to make it clear to principals that proforma disbursements accounts were only estimates and therefore subject to change in the light of the specific circumstances of the port call. FONASBA Club member and legal advisers ITIC had issued guidance on both issues following a number of claims by their members.

Prior to the Council Meeting, delegates and accompanying persons attended a seminar on the economic development of Morocco, with emphasis on the transport sector. Speakers at the seminar included the Moroccan Minister of Equipment and Transport, Mr. Karim Ghellab, the Itinerant Ambassador of His Majesty the King of Morocco, Mr. Hassan Ayoub, and representatives of the Department of Investments and the Tangier-Med container port project. With this extremely high level of diplomatic and government support, press and TV interest in the meeting was very high and President Philip Wood, President Designate Mario Froio and APRAM Chairman Aziz Mantrach gave a press conference earlier in the week, followed by TV interviews after the seminar.

The Annual Meeting closed, as it traditional, with the Council Meeting, which included a ballot for the host for the 2008 Annual Meeting — awarded to Croatia — and the election of officers for 2006/8. *Details of the new Executive Committee are provided on page 11.* In his final official act as President, Philip Wood also bestowed Honorary Membership of FONASBA on retiring Immediate Past President and former ECASBA Chairman Umberto Masucci of Italy, an award that was greeted with a sustained and extended standing ovation from the assembled delegates. The meeting closed with a presentation on the 2007 Annual Meeting in Buenos Aires by Centro de Navegación of Argentina and an address by newly elected President Mario Froio from Brazil, who officially took office on receipt of the President’s badge of office at the Gala Dinner.

EXTERNAL RELATIONS: COOPERATION WITH OTHER INDUSTRY BODIES

FONASBA values its collaboration with other organisations in the pursuit of common aims and therefore maintains close working relationships with other industry bodies on an international and regional basis. Currently FONASBA enjoys reciprocal membership status with the Baltic Exchange, BIMCO and INTERTANKO and indemnity insurer ITIC is a Club member of FONASBA.

FONASBA continues to play an active role in INTERTANKO's "Poseidon Challenge" and the first edition of the survey of port reception facilities for tankers — FONASBA's contribution to the project — compiled from information provided by members worldwide, was presented to INTERTANKO at its Tanker Event in Houston in March 2007. FONASBA is committed to keeping this survey up to date and the second edition is scheduled for publication in March 2008.

FONASBA's application to secure consultative status with IMO was approved in November 2006 and although formal confirmation will, we hope, be granted at the IMO Assembly in December 2007, FONASBA is already contributing to the work of the Organisation and has attended meetings of the Flag State Implementation (FSI) and Marine Environment Protection Committees (MEPC) as well as the 98th Council Meeting in June 2007. The grant of consultative status brings with it recognition at the highest level of the importance of the ships agency and broking sectors to the international maritime transport industry.

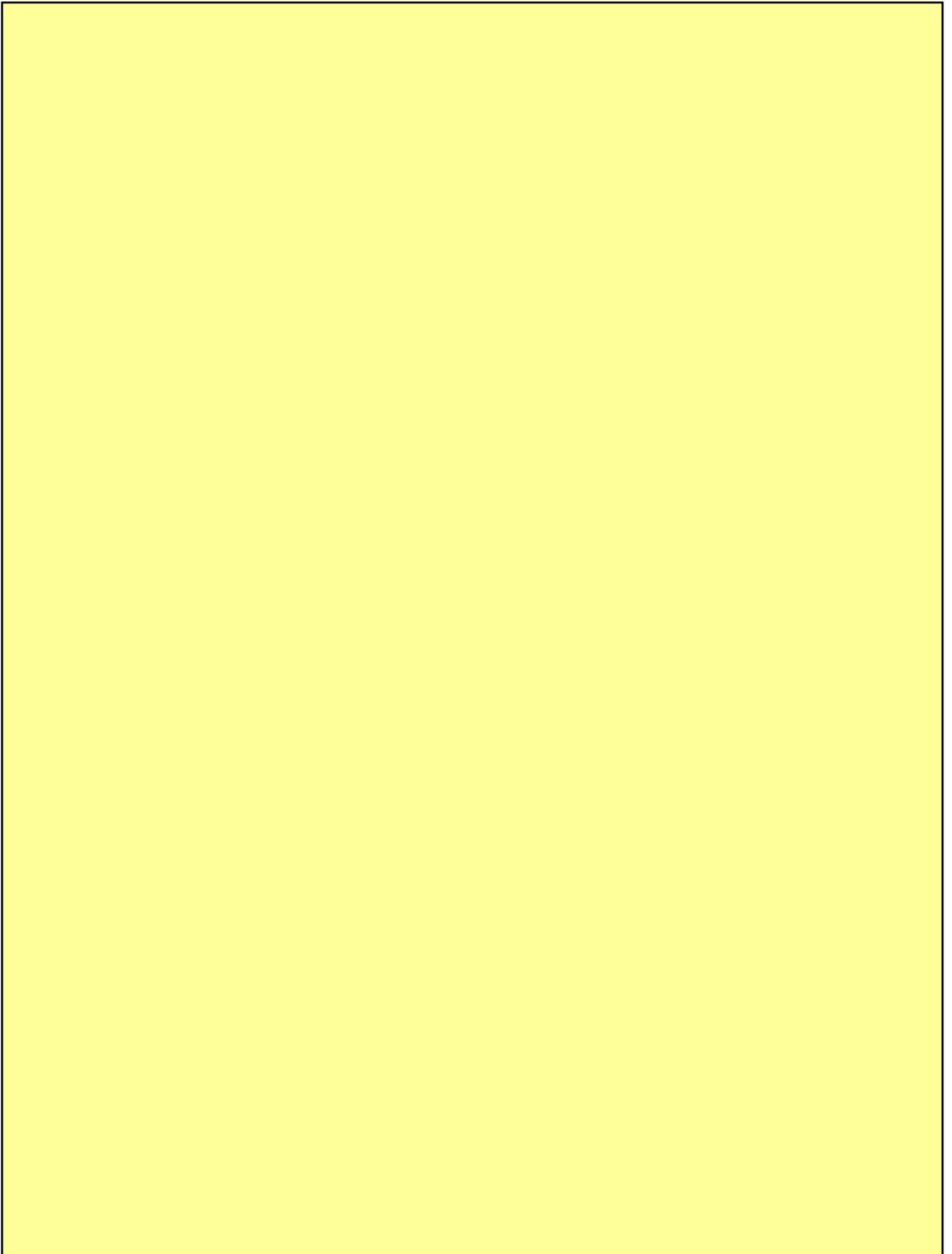
The role of the agent in the exchange of information between the ship and shore authorities and ECASBA's discussions with the European Commission on ship-generated waste disposal led to FONASBA contributing to the work of the Port Reception Facilities (PRF) forum on developing standardised forms for the notification and receipt of waste for disposal ashore. FONASBA is also playing a leading role in action in Brussels to combine the notification forms proposed by the PRF forum and the European Union into a single, worldwide format. The PRF Forum is currently led by INTERTANKO and supported by BIMCO and other industry organisations.

Regionally, ECASBA continues to play an active role in the development of European maritime legislation and has made significant contributions to the European Commission's consultations on port and maritime policy, customs developments and environmental issues. ECASBA is also an active member of the Maritime Industries Forum's Transport Working Group, an ad-hoc group of organisations representing port, shipping, transport and other interests.

CIANAM, the organisation representing ship agents associations in the Americas, also continues to promote cooperation between FONASBA members in the region, other associations and the relevant authorities, to promote best practice and increase the standards of education and training amongst its members.

COUNTRY REPORTS

The following pages contain reports from FONASBA member associations, covering their activities during the year. Some of the statistical data has been sourced from the “World Factbook” published by the Central Intelligence Agency.



Member Association Report — ARGENTINA

Association: *Centro de Navegación*

Membership: 58

Contact: *Mr. R. Garcia Piniero*

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Centro de Navegación

Population:	39 million
GDP 2005/6:	US\$ 608.8 Billion
Total Volume of Exports (2005/6):	US\$ 46.569 Billion
Total Volume of Imports (2005/6):	US\$ 34.159 Billion
Principal Commodities Imported:	Industrial manufactured goods
Principal Commodities Exported:	Grains, vegetable oils and vegoil by-products

Foreign Trade

Our country is one of the largest exporters of grains, vegoils and by products with a volume of aprox. 100 million tons. Exports reached a new historical record, with an increase of approx. 15 % compared to last year. The manufacture of agriculture products are those of higher participation within the argentine exports (33%), followed by the manufacture of industrial goods (32%), primary products (19%) and oil and energy (16%). In regard to containers, our country expects to move about 1.400.000 TEU this year. It is important the reefer cargo trade.

Port Situation

With almost 4725 Km. of Atlantic coastline, it is clear that Argentina has a variety of ports. The Parana-Paraguay waterway is also very important as many grain terminals are located in same.

For a quick reference, we could establish the following port chart:

- Container movement basically located within Buenos Aires and the city.
- Grain and vegoil exports in San Lorenzo, Rosario, Necochea and Bahía Blanca.
- Citrus, San Pedro and Campana.
- Fruits, San Antonio Oeste.
- Frozen fish, in the southern ports.
- Cruise Activities, Buenos Aires, Puerto Madryn and Ushuaia.

Port Investment

There are usually many private investments in the port system. Confirming this, lately a strong investment plan has been introduced by Trading Houses. Argentina continues the strategy to establish their ports as leaders in the grain and vegoil trades with Biofuel facilities and new port Terminals as Vicentin.

Tourism

Buenos Aires was chosen by the magazine Travel and Leisure as the second best destination point to visit. Cruise Vessel operation is growing steadily in Buenos Aires, Ushuaia and Puerto Madryn. This year we expect more than 4.5 million visitors and a 10 % more vessels from last year.

Association Activities

Centro de Navegación maintains strong participation in the regional chamber CIANAM, occupying as well the position of Vice President for the Americas in FONASBA. This year the annual meeting of CIANAM was held in Lima, Peru.

By ruling Nr. 121 from March 9th by the Education Secretary of Buenos Aires our education institute "CENTRO DE ESTUDIOS DEL COMERCIO MARÍTIMO INTERNACIONAL" has been declared an official education institute. This year the first group of students will finish their official degree of Shipping Administration.

This year our association is proud to be the host of the 2007 FONASBA annual meeting from October 9th to 13th in Buenos Aires. For this event, we have developed a website, www.fonasba2007buenosaires.com, which provides information on the business and social programmes, other delegate information and also allows for on-line registration.

Member Association Report — AUSTRALIA

Association: *Shipping Australia Ltd.*

Membership: 38

Contact: *Mr. Llew Russell*

Level 6, 131, York Street SYDNEY NSW 2000 Australia

Tel: (612) 9266 9900 Fax: (612) 9268 0230

e-mail: lrussell@shippingaustralia.com.au

website: www.shippingaustralia.com



Population:	20,434,176
GDP 2005/6:	US\$ 674.6 Billion
Total Volume of Exports (2005/6):	US\$ 127.7 Billion
Total Volume of Imports (2005/6):	US\$ 117 Billion
Principal Commodities Imported:	Machinery and transport equipment, computers and office machines, telecommunication equipment and parts; crude oil and petroleum products
Principal Commodities Exported:	Coal, gold, meat, wool, alumina, iron ore, wheat, machinery and transport equipment

Shipping Australia has had a very active 12 months in serving the requirements of its 38 shipping agent members as well as a similar number of corporate associate members. Consolidation in the industry has continued with Inchcape Shipping Services acquiring Oceania Maritime Services which in turn was a joint venture between Adsteam and Beaufort Shipping agencies. In addition, Svitzer-Wijismuller has acquired Australia's major towage operator, Adsteam Marine.

The Maritime Security Identification Cards were successfully introduced at the beginning of 2007 for all those requiring unmonitored access to security regulated areas in ports. This involved a criminal history check, security check and immigration check for applicants. Over 90,000 visas have been issued to date.

On 1 July this year for a transition period of six months, Australia introduced in Australia the new requirement for visas for foreign crew; being only the second country in the world to do so. Shipping Australia was consulted closely on the details of application which is electronic or can be hard copy although that takes longer to process. The visas last for three years and are free but after 1 January, 2008 crew arriving without visas may be detained onboard the vessel and the shipping company (agent) fined. More information can be obtained by visiting www.immi.gov.au/sea and about 80,000 have been issued since 1 July this year.

Environmental issues have continued to pose problems for SAL with the ongoing debate about a new national scheme for ballast water management which in turn is based on the international Convention but unfortunately some States have introduced their own regime for inter and intra-State ballast water management. SAL will continue to urge the States to be part of one national system. In addition, a new bio-hull fouling protocol will be introduced in Australia from 1 July next year and best practice guidelines have been developed to assist vessels visiting Australia in the future.

SAL accompanied the Australian Customs team on a visit to both Europe and the US in March, 2007 to investigate the possibility of Australia introducing a 24 hour prior to loading reporting regime for containers destined for Australia similar to the US/Canadian and Mexican systems. Trials have been held between Australia and New Zealand regarding mutual recognition of a possible Authorised Economic Operator programme in Australia. We have continued to consult closely with the Australian Quarantine Inspection Service on a range of issues including Giant African Snail inspections as well as a new simplified Pratique form which hopefully can be electronically transmitted in the future. Shipping Australia has similarly expressed serious concern at the rising costs of charges by port authorities in Australia as well as the increasing costs of pilotage and towage.

Shipping Australia gave evidence before the second Panel of Inquiry into the possible environmental effects of channel deepening in Melbourne which is essential if Melbourne is to retain its status as the premier container port in Australia. A final decision should be made by the Victorian Government at the end of this year. With the increasing possibility of congestion, SAL has been active in advocating the provision of inland ports and intermodal terminals with good road and rail access. SAL has also been advocating increasing infrastructure investment to reduce the extensive queues of coal vessels off our main coal exporting ports. Finally the proposed amendments to Part X of the Australian Trade Practices Act which provides exemption from anti-trust law for Conferences etc, has been postponed pending the Federal election expected in late 2007.

Member Association Report — BELGIUM

Association: NAVES vzw

Membership: 134

Contact: Mr. X.L.N. van Engelen

Brouwersvliet 33, bus 6, B-2000 ANTWERP, Belgium

Tel: (323) 222 9900 Fax: (323) 222 9911

e-mail: info@asv.be

website:



Population:	10,511,382
GDP 2005/6:	US\$ 369.6 Billion
Total Volume of Exports (2005/6):	US\$ 335.3 billion
Total Volume of Imports (2005/6):	US\$ 333.5 billion
Principal Commodities Imported:	Machinery and equipment, chemicals, diamonds, pharmaceuticals, foodstuffs, transportation equipment, oil products
Principal Commodities Exported:	Machinery and equipment, chemicals, diamonds, metals and metal products, foodstuffs

NAVES is the national federation of the Belgian organizations of shipping agents and brokers. Five organizations, located at the five seaports Antwerp, Zeebruges, Ghent, Ostend-Newport and Brussels represent in total 139 agencies, which means about 90% of the market. An ever increasing number are liner-owned offices founded by the container operators. Non-members mainly have to be situated in specific niches. All secretariat services are performed by the Antwerp Shipping Federation with a permanent staff of five.

In the year 2006 Belgian ports have handled **238 million tons** of cargo, of which over 167 million tons through the port of Antwerp, which still is the 4th biggest port in the world. Growth in tonnage compared to 2005 was 6,4%, and container volumes in Belgium increased with 9,8% to a good **8,7 million TEU** which is quite nice if you compare it to a total population of 10,5 million people! Although the container terminal capacity worldwide is getting more and more tight, we in Belgium were lucky not to have one single congested port: Already today Antwerp has a container capacity of over 9 million TEU and works are going on to increase this number up to 13 million, and Zeebruges still has lots of free space this in spite of really leaping volumes and is about to start further expansion. With extra dredging done in the sea approach, Zeebruges now can accept the “Emma” class container vessels of Maersk (estimated max capacity over 13.500 TEU), and tidal windows for sailing to Ghent and Antwerp could substantially be enlarged. Up to the river Scheldt, the actual Antwerp record call has now been performed by a Cosco liner with a 10.500 TEU capacity. We now are looking forward to the deepening program of the river Scheldt, which should start end of 2007.

We enjoyed a slight increase in dry and liquid bulk trades as well as in conventional and breakbulk trades with a special mention for the booming RORO trades. NAVES and her members hope to have contributed to this as we never stopped urging authorities to smoothen procedures.

Port resolutions, dating from easier times, are being reworked by NAVES and her members, as several judgments of the European High Court have reshuffled the responsibilities of agencies and stevedoring companies. For several specific trades, e.g. the shortsea and the conventional trades, labour organization was discussed with social partners and cost situation scrutinized in order to make Belgian ports even more attractive in the highly competitive North-Western area.

Next to this, NAVES and her members strongly invested in the relations between authorities and maritime industry. Belgian Customs are preparing fully paperless operations and a range of specific areas was analyzed, new procedures worked out and solutions for problems found in common working groups. At the same time, all new and future requirements of the European authorities were kept in sight. With Federal environmental departments we studied the ecological footprint of the important second hand car traffics, and with Railways we started to rework the whole system of demurrage and detention of railcars. NAVES also collaborated with Pilotage authorities in order to build a more transparent tariff system which will allow agencies to make a perfect cost estimate as it is no longer depending on the vessel's draft.

Our members also volunteered as try-out pilot for the E-Counter. In previous years we were fully involved in the analysis and the development of this electronic vessel's counter, which now went into production in Antwerp in August 2007. Other Belgian ports will follow in future. We strongly believe this single entry point for communication with authorities and maritime service providers will be a guarantee for a high standard service for all vessels calling our ports.

In this extremely busy year, our secretariat found the time to open her website, including an open part for the public and an intranet for members only, at first for the Antwerp Shipping Federation (www.asv.be), but enlargement for NAVES lies on the table.

Member Association Report — BRAZIL

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

Membership: *12 associations, 155 members*

Contact: *Mr. A. Luiz Zanin de Oliveira*

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e-mail: fenamar@fenamar.com.br

website: www.fenamar.com.br



Fundada em 7 de Setembro de 1989

Population:	189.600.000
GDP 2005/6:	US\$ 795.8 Billion
Total Volume of Exports (2005/6):	US\$ 137.5 Billion
Total Volume of Imports (2005/6):	US\$ 91.4 Billion
Principal Commodities Imported:	Wheat, Corn, Rice, Barley and Malt
Principal Commodities Exported:	Orange Juice, Steel, Iron, Sugar, Soya Beans and by-products and Meat

Projects:

FENAMAR during the last twelve months has worked very hard in many projects, among which the most important ones are the following:

→ FENAMAR implemented a project in 2005 to offer the transmission service of EDI files for the Affiliated members, the so-called VAN FENAMAR. Now we are very happy to mention that during the last 12 months, VAN FENAMAR generated a direct saving to such members of US\$ 150,000.00

→ FENAMAR was actively involved in the discussion with the Government Authorities of a project to privatize the services of dredging of ports and the Government already confirmed that they will present a Bill in such direction.

→ FENAMAR succeeded to interfere into a Project of Law that, once in force, will allow the implementation of a Delivery Order in Brazil.

→ FENAMAR with the support of CNT – National Transport Confederation launched last December a national survey regarding the opinion of the Shipping Agencies regarding the performance of services and Authorities at all the main ports in Brazil. This Survey is now being widely used by our government and private entities related to ports.

→ SISCOMEX CARGA – This is a new integrated system being developed by our Customs Authorities and our Marine Merchant Authorities which will have a huge impact on the life of all involved in Shipping in Brasil. In this respect, FENAMAR became extremely involved in all the development stages of the project, to the extent that FENAMAR was appointed by the Customs Authorities to lead the committee involving all the private sector (Shippers, Importers, Marine Terminals, Port Operators, etc) in order to analyze the system and proposed improvements, where possible. The new system is expected to be launched by the end of 2007.

→ FENAMAR is officially launching its Quality Program in order to certify the services provided by its affiliated members.

→ FENAMAR has working a project to develop an e-Learning Program in association with CNT to offer to affiliated members.

Conferences and Seminars:

FENAMAR in the beginning of 2007 became the chairman of the Water Transportation of CNT, the most important Transport Association in Brazil.

Fenamar represented the private sector related to Maritime Transports during the event promoted last year in Algeiras / Spain by OAE/CIP (Organization of American States / International Chamber of Ports).

This year FENAMAR went to Peru/Lima, to attend the IV Annual Meeting of CIANAM and discuss several issues related to Shipping Industry in the Americas.

With regards to Brazil Government, FENAMAR has been invited to participate and voice the opinion of the Shipping Agency in all the most important FORUMS discussing Port related Business and Integrated Transport Logistics to help the implementation of the changes badly needed by our Ports.

In a nutshell, we can proudly say that, nowadays, FENAMAR is always invited to participate in any important meeting related to maritime transportation.

Member Association Report — BULGARIA

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

Membership: 52

Contact: *Mr. I. Demirov*

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Tel: (35952) 603674 Fax: (35952) 603675

e-mail: rakba@mt-link.bg

website: www.basba@mt-link.bg



Population:	7,332,858
GDP 2005/6:	US\$ 78.68 Billion
Total Volume of Exports (2005/6):	US\$ 15.50 Billion
Total Volume of Imports (2005/6):	US\$ 23.80 Billion
Principal Commodities Imported:	Machinery and equipment, metals, ores, chemicals and plastics, fuels, minerals and raw materials
Principal Commodities Exported:	Clothing, footwear, iron and steel, machinery and equipment, fuels

BASBA has 52 members; two have joined this spring. The association comprises a liner agents section, a brokers section and a Danube river section within its structure. BASBA members act for about 85 % 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 60% and increasing).

The Liner agents section has continued its work on providing mutual standards and practices and in the last year. The association also continues to prepare a wide range of statistics on Bulgarian port throughput. In the past year total cargo passing through the Black Sea ports amounted to 27.74 million tonnes, (up 3,5% on the previous year), and through Danube river ports 4 million tonnes (up 10.5%) whilst total container traffic through the seaports stood at 120,000 TEU (up 9%).

BASBA had hoped to attain the statute of branch organisation, so that we may influence more directly on the diverse work of the administrations. Regretfully the law concerning the branch organisations has not yet been voted and the government with relative administrations does not concern the opinions and analysis of BASBA as essential in their decisions. The Bulgarian court however does concern our opinions as important and BASBA was constituted as a side by the Constitutional Court. BASBA was also asked for a statement concerning the privatization of NaviBul. The association has been closely involved in the implementation in Bulgarian ports of EU Directive 2000/59/EC (relating to disposal of ship generated waste) with effect from January 1st 2007. In the end of 2006 there had started an idea for changes in the law concerning the Indirect Taxes. The Bulgarian representatives of KPMG in accordance to assignment from other companies and supported by BASBA had proposed changes in the law and the project is currently presented in the Narodno Subranie. BASBA had signed an agreement for mutual work and help in the problems concerning Custom controls in the port of Varna with the Regional Customs Directorate in Varna and is working to extend this agreement to the ports of Bourgas and Rouse. In spite of this example of close co-operation between BASBA the authorities, overall dialogue between industry and the government continues to be poor.

BASBA had organized two seminars – one concerning the new Law for the Indirect Taxes and one concerning the Customs Law. Some of our member's Managers are members of the ICS London and are teaching in the Bulgarian department of the Institute in Varna which could prove helpful in organizing future seminars concerning brokers and agents education.

Other efforts to reform the sector are also facing problems. The efforts led by BASBA to enhance border control procedures — a major bottleneck in Bulgarian ports - have been frustrated again by the separate authorities retaining the right to board all vessels and carry out their inspections. In some cases, particularly where container vessels are concerned, the inspections can take longer than the cargo operations. Furthermore, our achievement is that free pratique can be granted by fax but only in particular cases and only in port Varna - West. In the end of 2006 the Ministry of transport had made some changes in the Port Tariffs after a very strong influence from BASBA but still the prices remained high. In the last few years BASBA had developed a mechanism of communications with its members who proved to be convenient and useful for our work. The veterinary checkpoint in the container port of Varna East is unable to provide adequate levels of and bottlenecks occur and currently the Ministry of Agriculture and Forestry had finally decided after a pressure from the Maritime Business in Bulgaria to build a new checkpoint in port Varna-East

There were made different contacts with BASBA and presented the visions of the Maritime business on the Government concerning the building of the new Container terminals in the Bulgarian Sea ports.

The reputation of BASBA in international scale is growing, the prove is the active participation in the meetings of FONASBA and ECASBA providing them with competent information concerning the Maritime Industry in Bulgaria.

Member Association Report — CROATIA

Association: *The Association of Maritime Agents of Croatia*

Membership: 20

Contact: *Mr. M. Tudor*

Kolberov trg 2 HR-5100 RIJEKA Croatia

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website: www.asbac.hr



Population:	4,441,000
GDP 2005/6:	US\$ 34.33 Billion
Total Volume of Exports (2005/6):	US\$ 7.50 Billion
Total Volume of Imports (2005/6):	US\$ 18.50 Billion
Principal Commodities Imported:	Consumer goods, agrarian products, coal, iron ore, steel products
Principal Commodities Exported:	Ships and ships equipment, agrarian products

Croatia is the world's sixth largest shipbuilding nation, with annual production in excess of 2.3 million tonnes deadweight. The total capacity of vessels under the Croatian flag is approximately 2.5 million tonnes deadweight.

In recent years, Croatia has been recognised as an attractive location for inward investment. Direct overseas investment in the country has risen from approximately US\$ 1.95 Billion in 1998 to US\$ 22.1 Billion in 2006. In the same period, approved credits granted by foreign banks have increased from US\$ 6.5 Billion to US\$ 22.1 Billion.

Turnover in Croatian ports, primarily Rijeka and Ploče, has increased significantly in recent years and now totals approximately 4.5 million tonnes per annum. Container handling has shown the largest sector increase, with the port of Rijeka handling 150,000 TEU in the first nine months of 2007, matching the total handled through all of 2007. On the back of this demand, the port is now developing a new container terminal with an annual capacity of 1 million TEU per year.

At Gaženica, in the vicinity of Zadar on the Adriatic Sea, a new Ro-Ro facility has been established which will link the new Zadar-Zagreb-Hungarian border motorway with the port of Ancona in Italy and so will enhance road transport of goods between central Italy and eastern European countries — as well as boost short sea shipping.

Croatia hopes its EU Candidate member status will stimulate both domestic and foreign investment and create an optimistic economic outlook for the future. Tourism remains a major revenue earner for the Croatian economy and the increasing popularity of the country as a tourist destination is borne out by increasing development of hotels and small marinas along the coast.

Member Association Report — CYPRUS

Association: *The Cyprus Shipping Association*
 Membership: 35
 Contact: *Mr. E. Kouzapas*
P.O. Box 50529, CY-3606 LIMASSOL, Cyprus
Tel: (35725) 376551 Fax: (35725) 360675
e-mail: info@csa-cy.org
website: www.csa-cy.org



Population:	800,000
GDP 2005/6	US\$ 18.0 Billion
Total Volume of Exports 2005/6:	US\$ 2.0 Billion
Total Volume of Imports 2005/6:	US\$ 6.0 Billion
Principal Commodities Imported:	Consumer goods, petroleum and lubricants, intermediate goods, machinery, transport equipment and chemicals
Principal Commodities Exported:	Agricultural and light industrial products, pharmaceuticals and cement

The Cyprus Shipping Association (CSA) remained actively involved in matters concerning the Port Industry in Cyprus.

Short Sea Promotion Centre (SPC)

The CSA maintains a strong interest in the activities of the Cyprus SPC which is presently in the process of consolidating itself as the focal point for the promotion and improvement of SPC links in Cyprus. A primary object is the collection and dissemination of information, knowledge and education relevant to SPC and the establishment of necessary mechanisms for this. A Cyprus SPC website is under construction.

Electronic Customs Regulations of the E.U. and the Authorized Economic Operator based on the Community Customs Code

The Cyprus Customs have presented to the local stakeholders the developments concerning the introduction of the electronic customs regulations of the E.U. Our Association, in cooperation with the Cyprus Customs is organizing seminars for our members on the forthcoming introduction in Cyprus of the Authorized Economic Operator (AEO) foreseen for 01/10/2008.

Introduction of a security charge at Cyprus Ports

Our Association remains opposed to such action trying to protect both the interests of the shipowners and the shippers. This subject however is under serious consideration by the CPA which has initiated discussions with the Cyprus Chamber of Commerce and Industry and other interested parties. The discussion concerns the nature of the new charges to what extent they will affect the Vessels and the Trade. The CPA hopes to come to an agreement with the parties involved by the end of this year.

Port Labour Council

With the active support of the CSA and the Labour Unions, the Labour Council has approved the procedures for the renewal of the port labour force. The stevedores will receive proper training and will work under more modern and efficient conditions complying fully with the new E.U. regulations. The new scheme will be implemented by the end of this year.

Upgrading and expansion of Limassol Port

Our Association follows with great interest and fully supports the CPA's plans for the expansion and upgrading of the Port of Limassol. These plans consist of dredging the container terminal to 16.0m and the subsequent expansion of the deepwater container quay by 500m to 1200m. In parallel, the CPA is proceeding with the enlargement of the container stacking area and the purchase of two post-panamax gantries.

Health and Safety of workers in the Port.

Following the provisions of the E.U. legislation on Health and Safety at work, our Association has commissioned a Risk Assessment and Analysis study on the handling of cargo, both on land and onboard the vessels. The aim of the CSA is to establish a safe and healthy work environment in the Ports both for stevedores and our members' personnel in an effort to eliminate accidents, injuries and damages during the operation of vessels.

Member Association Report — DENMARK

Association: *The Danish Shipbrokers Association*

Membership: 151

Contact: *Mr. A. Houtved FICS*

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e-mail: info@shipbrokers.dk

website: www.shipbrokers.dk



Population:	5,500,000
GDP 2005/6:	US\$ 257.3 Billion
Total Volume of Exports (2005/6):	US\$ 93.93 Billion
Total Volume of Imports (2005/6):	US\$ 89.32 Billion
Principal Commodities Imported:	Machinery and equipment, raw materials and semi-manufactured goods for industry, chemicals, grain and foodstuffs, consumer goods
Principal Commodities Exported:	Machinery and instruments, meat and meat products, dairy products, fish, pharmaceuticals, furniture and windmills

General Shipping Climate

Danish shipping companies operate totally more than 55 million tonnes DWT and had as per 1 May 2007 ordered 290 newbuildings totalling 15 million tonnes DWT and representing a value of US\$ 15.7 billion.

About 7 % of the world tonnage is operated from Denmark and Danish shipping companies arrange transportation of 10 % of the world transportation.

It is the Danish Government's objective to ensure framework conditions for Denmark to take part in the development and growth associated with globalisation.

A report headed "The Danish Maritime Cluster - an agenda for growth" was published in March 2006 and can be found at the following internet address: <http://www.oem.dk/sw16821.asp>

This report analyses the maritime cluster and provides the basis for the Danish Government's action plan for growth, which rests on three objectives:

- Denmark should develop to become the most attractive place in Europe to operate international quality shipping.
- Conditions for growth, dynamics and competitiveness across the entire Danish Maritime Cluster should be enhanced.
- Health, safety and environment measures on ships should be maintained and improved, so that Denmark develops as a leading maritime nation with an international focus and quality shipping.

Education

Education is high on the agenda and Danish Shipbrokers' Association is very active in education activities as well as in activities aimed at increasing the numbers of employees in the business.

In order to promote further interests we and the members are attending various exhibitions and activities and also marketing in radio and television have been made.

One of our members, Lysander Shipping, was honoured by the Minister for Education for their efforts in connection with Education and Internationalization.

Danish Shipbrokers' Association is Distance Learning Centre for The Institute of Chartered Shipbrokers and we are proud and happy for the increasing acceptance of this education in Denmark.

In Denmark there are two different MBA's specializing in shipping.

Members' meetings

During the spring meetings were arranged in different areas with the members in order to inform of the various activities the Association is involved in, the various political activities, legal aspects etc. During the fall our Annual General Meeting is held. The various committees are meeting on ad hoc basis and especially the Liner Committee is very active.

Member Association Report — DUBAI

Association: *The Dubai Shipping Agents Association*

Membership: 52

Contact: *Mr. S. Rais*

P.O. Box 27345 DUBAI United Arab Emirates

Tel: (9714) 345 3144 Fax: (9714) 345 6411

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website: www.dubaisaa.ae



Population (United Arab Emirates):	4,444,000
GDP 2005/6 (UAE):	US\$ 129.5 Billion
Total Volume of Exports (2005/6) (UAE):	US\$ 137.1 Billion
Total Volume of Imports (2005/6) (UAE):	US\$ 88.89 Billion
Principal Commodities Imported (UAE):	Machinery and transport equipment, chemicals, food
Principal Commodities Exported (UAE):	Crude oil, natural gas, dried fish, dates

Dubai Shipping Agents Association (DSAA) was formed to promote fair and equitable practices in the shipping profession in so far as shipping agents are concerned.

The important aims and objectives of Dubai Shipping Agents Association are to work as the local shipping agent's association, for the stability and improvement of the shipping activities of its members and for the whole shipping industry, to demonstrate the value of the various services offered by shipping agents to ship owners and operators, to discuss with various authorities, with regard to adoption of the best common practices, to assist members in defining their legal obligations and liabilities and to provide guidance where possible, to encourage and assist members in developing quality systems and performance, to promote simplification and standardization of shipping, customs and port documentary and operations procedures, to create and issue standard forms of documents and clauses which are in the best interests of its members and the shipping industry as a whole and to generally seek to promote and protect the profession and interests of shipping agents. The shipping agent's liability can be avoided/reduced by implementing local Customs and Ports rules and regulations through the Dubai Shipping Agents Association. The Shipping Agent's relation with Customs and Port Authority are correlative as such through negotiations and discussion with the customs and port authorities Dubai Shipping Agents Association can achieve its goal.

Members of Dubai Shipping Agents Association will ensure that all activities are carried out honestly within the highest standards of professional integrity and diligent manner, will observe all national and international laws and any local regulations appertaining to the shipping industry, will take great care to avoid any misrepresentation and ensure that all activities are subject to the principles of honesty and fair dealing. Dubai Shipping Agents Association conducts interactive workshop and seminars for enhancing the shipping knowledge and to promote fair and equitable practices in the shipping profession, as follows:-

MEET & GREET SERIES - On quarterly basis, DSAA organizes this event wherein all the members have 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.

MEETING WITH GOVT. DEPARTMENTS- DSAA had organized these meetings for the benefit of members, who were facing some problems with their crew pertaining to the immigration etc.

CONTAINERS ON HOLD – DSAA had organised a meeting with Dubai Customs, whose containers were put on hold for along period of time.

BIMCO SEMINAR ON TOUGH TANKER – DSAA supported this event.

EDUCATIONAL SEMINARS – DSAA organises educational classes on various topics.

CUSTOMER WORKSHOP ON UCP 600 – DSAA coordinated the participation of its members in this programme which was organized by the Trade Finance Center of the Commercial Bank of Dubai.

Professional Qualification in Shipping- DSAA is also negotiating with the Local Freight forwarding association in order to conduct educational programmes for the benefit of the members.

Member Association Report — FINLAND

Association: *The Finnish Shipbrokers Association*

Membership: 73

Contact: *Mr. S. Lomberg*

P.O. Box 199, FIN-00181 HELSINKI, Finland

Tel: (3589) 8240 5750 Fax: (3589) 8240 5755

e-mail: secr@shipbrokers.fi

website: www.shipbrokers.fi



Population:	5, 238,460
GDP 2005/6:	US\$ 176.4 Billion
Total Volume of Imports (2005/6):	US\$ 84.72 Billion
Total Volume of Exports (2005/6):	US\$ 71.69 Billion
Principal Commodities Imported:	Foodstuffs, petroleum and petroleum products, chemicals, transport equipment, iron and steel, machinery, textiles, yarns and fabrics, grains
Principal Commodities Exported:	Machinery and equipment, electronics, metals, paper, pulp, chemicals

The domestic commercial environment continued positively. The industrial production shows a clear increase consequently so also the Finnish trade. The employment figures continued moving to the better and are now the lowest in 15 years. The prospects for the industry looks fairly good at least for the remaining year, but wage negotiations with the main labour organizations are still to be held this fall. Agreements already made have resulted in wage increases around 8 percent thus increasing inflation pressure.

The election for a new Parliament held in March 2007 was a success for the right wing party, but a loss for the Social Democrats who now moved into opposition. Main Government parties became the "Center party" and "Right wing". For the Finnish shipping a functioning tonnage tax is a necessity and the most important issue for a positive future development. In particular the "Right wing" supports a revision of the "tonnage tax" and has also initiated a decrease of the fairway dues (tax) by 10 percent. The Finnish merchant fleet reduced drastically due to, among others, the sale of Silja Line to Estonia. The Italian Grimaldi Group acquired early this year the majority shares of Finlines, the major Finnish cargo carrying shipowners. Changes in top management has been made but the vessels however so far flying Finnish flag. The Finnish merchant fleet now transports less than 20 percent of the total trade now well exceeding 100 million tons.

The main topic for the Association during the ongoing year is still the issue of fairway dues and legislation. We expect that the European commission will take a position to our claim within October this year. Some owners/agents has taken to court cases where the original ice class of vessel been lowered by FMA decision. Court decisions were expected already last fall, but yet today open.

The Association continued to actively promote having the English language accepted by authorities as basis for granting pilot license. We also discussed this issue with EMSA (European Shipowner Community Association) and received their support. A working group was established by the Ministry of Transport. The group could though not reach an agreement and negotiations resulted in a deadlock.

The Association has two representatives in a working group set up by the Customs Board to deal with questions related to electronic lodging and exchange of pre-arrival/departure information as of 1st July, 2009.

We continue to work for a change towards a more reasonable HELCOM waste strategy. EU representative was made aware of peculiarities in the waste strategy during the ECASBA seminar in Brussels.

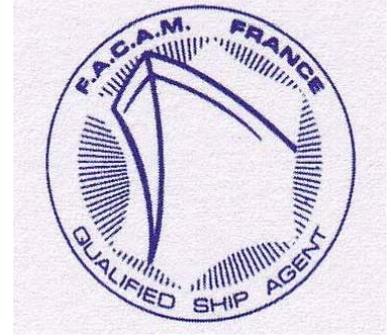
We aim to offer our members educational options within our branch and continue to explore the alternatives.

A revision of the Piloting tariff is under study and we have clearly stated our views on this issue. In short we see there is room for a decrease in rates through rationalisation.

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
 Contact: *Mr. A. Lobadowski*
 10, Rue de Laborde 75008 PARIS France
 Tel: (331) 5367 7710 Fax: (331) 4723 5095
 e-mail: *facaff@club-internet.fr*
 website:



Population:	63,713,926
GDP 2005/6:	US\$ 1.891 Trillion
Total Volume of Exports (2005/6):	US\$ 525 Billion
Total Volume of Imports (2005/6):	US\$ 564 Billion
Principal Commodities Imported:	Intermediate goods, machinery, vehicles, energy products, crude oil, agricultural products, food
Principal Commodities Exported:	Machinery and transportation equipment, aircraft, plastics, chemicals, pharmaceutical products, iron and steel, beverages

A good part of the second half of year 2006 and first part of 2007 have been governed in France by elections to come, first for the President, then for deputies, leading to a social climate very much influenced by the political situation. Apart from the lobbying itself performed by many bodies in such situations, in our field a lot of people took this opportunity to convey their wishes with the hope to obtain a hearing from the candidates, and it was the reflection on the future of our ports who focused most of the ideas expressed. Our Federation was of course involved and brought its contribution, particularly by writing to the main political leaders and taking part to a press conference to express our views after troubles occurred in Marseille about organization of work.

As finally elected President Sarkozy seems to be willing to make things progress, reasonable hope may be put on an improvement of the competitiveness of our ports with still the interrogation about the means which will be granted. The last months of 2007 will probably be important in such a view, and mainly for our professions as the situation of our ports in the last past year did not allow our members to fully take advantage of the generally good tendency of the trades.

Apart from those considerations, the main topics raised up the last few years are still on the table. Competition on towage in the port of Le Havre has now been introduced but without having proved so far its long-dated economical viability.

As far as costs are concerned, no important changes occurred in main tariffs and their increases remained reasonable in most sectors. A special attention had however to be paid to harbour dues as in some places the application of contracts between port authorities and the French administration lead to significant increases. In spite of their efforts our local associations could unfortunately hardly do much about that, especially where past agreements were concerned. Hopes are put in a better consideration of clients positions in the future providing government's assurances to improve port management are fulfilled.

A number of issues had however a positive outcome in the last twelve months, such as the opening of Port 2000 terminals in Le Havre, offering to international maritime operators new and modern available capacities, and the decision taken on the principle to launch the works for the Fos 2XL terminal near Marseille. A modern and high performing common harbour information system called AP+ has also been implemented in Marseille and Le Havre and is intended to be progressively extended to all major French ports.

Our association has been involved in the follow up of all those events, together with a few other important subjects such as attempts to try to obtain an official recognition of our profession in the view of what might be expected from our members in the future, and particularly in connection with safety and security regulations. In the same respect we are keeping close connection with custom authorities to follow the implementation of new regulations and specially the outturns of the so called authorised economic operators.

Member Association Report — GERMANY

Association: *Zentralverband Deutscher Schiffsmakler*

Membership: 400

Contact: *Mr. K. Bültjer*

Schopenstahl 15, 20095 HAMBURG, Germany

Tel: (4940) 326082 Fax: (4940) 331995

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website: www.zvds.de



Population:	82,400,996
GDP/2005/6:	US\$ 2.63 Trillion
Total Volume of Exports (2005/6):	US\$ 1.133 Trillion
Total Volume of Imports (2005/6):	US\$ 916.4 Billion
Primary Commodities Imported:	Machinery, vehicles, chemicals, foodstuffs, textiles, metals
Primary Commodities Exported:	Machinery, vehicles, chemicals, metals and manufactures, foodstuffs, textiles

The German Shipbrokers' Association (Zentralverband Deutscher Schiffsmakler e.V. ZVDS) is the national umbrella organisation of 12 local shipbrokers' associations, (Hamburg (2), Bremen (2), Flensburg, Kiel, Lübeck, Rostock, Emden, Wilhelmshaven, Duisburg, Stuttgart) representing a total of about 400 member companies.

General situation:

In 2006, Germany was the world's top export nation for the fourth time in succession. Exports rose by 13.7% compared to 2005, and imports likewise increased substantially, up 16.5% to a record level of 731.7 billion euros. A large part of this positive development was due to the continued boom in the global economy. German companies succeeded in safeguarding and expanding their competitiveness. At the same time, the first signs of a recovery in domestic consumption emerged in 2006. In keeping with trade, marine transport developed well in Germany. It exceeded the 300 million tonne threshold for the first time, with an increase of 7%. Container transport showed particularly strong growth. The number of units handled was up 14% from 12.1 to 13.8 million TEU. The forecasts indicate that the volume of goods handled at Germany's major seaports will rise to 759 billion t in 2025. That corresponds to an average annual growth rate of 3.6%. In view of this growth, a capital expenditure plan has been prepared up to 2010, for appropriate improvement of the onward connections from German seaports and the fairway approaches to the ports. That includes not only improvements in the shipping channels of the Weser and Elbe, and modernisation work on the Kiel Canal, but also further important improvement programmes for rail and long-distance road connections.

Activities of the Association:

The German Shipbrokers' Association is very active in standing up for the interests of its members vis-à-vis authorities and government departments at Federal and Land levels and other professional associations. Other activities include promotion of the education of young shipping brokers and agents, with great importance attached to cooperation with the vocational training schools and a number of further education institutions. Together with the German Shipowners' Association, the German Shipbrokers' Association is preparing a new edition of the standard textbook for shipping brokers and agents. Publication is scheduled for 2008. A further training course entitled "Quality Broking 2007" has been elaborated in cooperation with the Bucerius Law School. In the context of German Council Presidency, a European Conference was held on the EU Green Paper in Bremen in May 2007, with active participation by the Association. Other European issues were mainly communicated via ECASBA. Another important subject was the introduction of the Customs Code, including introduction of the Approved Economic Operator (AEO). The German Shipbrokers' Association has revised its General Conditions of Business, adapting them to the new law of obligations and competition law. It has also revised the recommended agency fees. All important information has been communicated to members in a monthly circular. The Annual General Meeting was held in Emden this year, providing a forum for discussion.

Hamburg Shipbrokers' Association:

The Hamburg Shipbrokers' Association published the HAMBURG INDEX of Containership Time-Charter Rates once a month. This is a neutral market survey, based on the charter parties fixed by about 20 freight brokers. Every year the Hamburg Shipbrokers' Association organises the traditional "Eisbeissen", a dinner event which counts among the major events in the social calendar. In 2006 it was attended by more than 5000 guests from more than 50 nations. Poland was the official partner country in 2006; Korea has been designated as partner country for 2007.

Member Association Report — GREAT BRITAIN

Association: *The Institute of Chartered Shipbrokers*

Membership: 114

Contact: *Mr. C.H. Stride FICS*

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website: www.ics.org.uk



Population:	60,776,238
GDP 2005/6:	US\$ 2.346 Trillion
Total Volume of Exports (2005/6):	US\$ 468.8 Billion
Total Volume of Imports (2005/6):	US\$ 603.0 Billion
Principal Commodities Imported:	Fuel, Manufactured Goods, Food
Principal Commodities Exported:	Fuel, Chemicals, Manufactured Goods, Food, Beverages

The Institute of Chartered Shipbrokers (ICS) is the internationally recognised professional body representing Shipbrokers, Agents and Managers in the United Kingdom and Overseas, with some 3500 Individual and over one hundred 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 continues to be 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. Federation representatives, as well as having a permanent place on a number of Government committees, continue to be directly concerned with a number of consultations and initiatives involving Her Majesty's Revenue and Customs (HMRC), Maritime Coastguard Agency (MCA), Home Office, Department for Transport (DfT) and the SITPRO amongst others. Consultations during the past year have involved AEO Developments, SAD Harmonisation changes, Re-organisation of UK Customs Clearance facilities, UK Border Management and Controls, UK and EU Port Policy legislation, UK and EU Marine Policy legislation as well as a number of operational and practical matters.

A major thread of many of the consultations over the past year is the ongoing and increasing concerns of security which impacts on most elements of the shipping industry. Our efforts are centred on endeavouring to ensure that any new legislative requirements, be it UK, European or International, continues to allow the best possible flows of international trade with minimum disruption and avoiding duplication of controls. Education of Government Departments is therefore an important part of our role.

Following on its close contacts and excellent relationship with these Government Departments, and the previous agreements made on behalf of its Company members for them to undertake certain responsibilities on behalf of those Authorities, Federation Council discussions are ongoing with HMRC regarding the reporting and clearance of vessels and should be finalised by the end of 2007.

The close links with FONASBA and ECASBA continue and the Institute Federation Council continues to play an active part in the various developments and consultations that have occurred over the past year. Members of the Institute sit on a number of FONASBA and ECASBA committees.

Education and Training are one of the major roles of the Institute, and its Tutorship arm again celebrated a further increase in the 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.

One day training courses, the 'Business of Shipping', and 'Liner Business' are offered and are given in support. These are available in London or can and have been given in company premises around the country and overseas. Any FONASBA/ECASBA Association interested in holding courses should please contact education@ics.org.uk.

Member Association Report — HUNGARY

Association: *The Hungarian Shipbroking & Shipping Agents Association*

Membership: 11

Contact: *Mr. P. Demeter*

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e-mail: hunasba@mail.datanet.hu

website:



Population:	10,055,000
GDP 2005/6 (US\$):	US\$ 175.2 Billion
Total Volume of Exports (2005/6):	US\$ 0.54 Billion
Total Volume of Imports (2005/6):	US\$ 0.56 Billion
Principal Commodities Imported:	Machinery and equipment, other manufactures, food products, raw materials, fuels and electricity
Principal Commodities Exported:	Machinery and equipment, other manufactures, fuels and electricity, food products, raw materials

Hungary is a landlocked country in a strategic location astride main land routes between Western Europe and Balkan Peninsula as well as between Ukraine and Mediterranean basin, the north-south flowing Duna (Danube) and Tisza Rivers divide the country into three large regions. There is an excess south to the Black Sea through the Danube and north to A-R-A ports via the Danube-Rheine - Maine Canal. The length of the inland waterways 1.622 km (most on the Danube river). Ports and terminals from north to south on the Danube: Győr-Gönyü, Budapest, Csepel, Dunaujváros, Baja and Mohács.

Most of the major shipping lines have their own offices in Hungary besides the local shipping agents and these offices are acting mainly as booking agents for the lines and arranging pre-carriage or on-carriage respectively of the cargoes or containers to and from the main European seaports owing to the landlocked position of the country. The main accessible seaports by road, railways or waterways in alphabetical order are: A-R-A ports, Bremen, Constantza, Galatz, Hamburg, , Koper, Reni and Rijeka.

In addition to its membership of FONASBA/ECASBA, the “Hungarian Shipbrokers and Shipping Agents Association” continues to be a member of the MVVLSZ (Hungarian Rail-, Water- and Air Transport Association) and an associate member of MSZSZ (Association of Hungarian Forwarding and Logistic Service Providers). In 2006/2007 the main task of the Association was - and still is - to convince the managements of the local offices of the shipping lines and the local shipping agents who are not the members of the Association yet to apply for the membership thus to strengthen the position of the shipping industry by doing so.

The shipping industry in Hungary continues to remain on the periphery as practically there is no political and governmental/administrative support for inland navigation. Unfortunately there was no improvement during 2006/2007 on the “NAIADES” project of the European Commission which was supposed to assist the development of the EU waterways.

As in the last years, during the last twelve months the “Hungarian Shipbrokers and Shipping Agents Association” expressed their opinion on several regulative drafts of the national government related to the transport industry- including shipping – prior to presenting the Bills to the vote of the Parliament. Our Association has been represented at the meetings of FONASBA, ECASBA, MVVLSZ and MSZSZ and our representatives regularly attended the important local forums and seminars of the industry.

Member Association Report — IRELAND

Association: *The Irish Ships Agents Association*

Membership: 40

Contact: *Mr. P. Brennan*

Ormonde House, 26, Harbour Row, COBH, County Cork, Ireland

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e-mail: isaa1@eircom.net

website: www.irishshipagents.com



Member of FONASBA

Population	4,109,086
GDP 2005/6:	US\$ 180.7 Billion
Total Volume of Exports 2005/6:	US\$ 119.8 Billion
Total Volume of Imports 2005/6:	US\$ 87.36 Billion
Principal Commodities Imported:	Data processing equipment, chemicals, petroleum, textiles
Principal Commodities Exported:	Machinery and equipment, computers, pharmaceuticals, chemicals, live animals and animal products

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

ISAA has two affiliate members, i.e. Belfast Shipping Agents Association and Irish Port Employers Association.

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 take 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). The Sub-Committee 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.

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

Dublin Port Tunnel officially opened in December 2006, this new facility has improved the flow of traffic around Dublin considerable, there is now 8000 trucks and 2500 cars a day using the facility which has freed us the previously congested city streets. Coupled with this the local city council has banned heavy goods vehicles from the city center at certain times of the day. This has allowed the port to grow its overall volumes by 10% in the 6 months to end of June.

At the same time major improvements have been made to the road network between Dublin and Belfast. Two new by pass developments have opened making it easier than ever to get from Dublin to Belfast and vice versa.

The planned Port development North of Dublin port is very much alive with Drogheda port nominating a partner to develop this new port. They now are awaiting an environmental decision before going to planning department.

Major improvements are also planned for Cork port and in particular the Oyster Bank development, the plan is to move all business from the South jetties in Cork down river to the Deepwater facility at Ringaskiddy.

All of the above projects are vital in helping to ease the congestion in Irish ports, this is the one major obstacle to all shipping related companies improving and increasing their business.

For further details please visit our website – www.irishshipagents.com

Member Association Report — ISRAEL

Association: *The Chamber of Shipping of Israel*

Membership: 48

Contact: *Mr. R. Zuck—President*

P.O. Box 33113 Code 31330 HAIFA Israel

Tel: (9724) 867 0455 Fax: (9724) 867 0456

e-mail: lishsap@lishsap.org.il

website: www.shipping.org.il



Population:	7, 100,000
GDP 2005/6:	US\$ 151 Billion
Total Volume of Exports 2005/6:	US\$ 45.882 Billion
Total Volume of Imports 2005/6:	US\$ 55.129 Billion
Principal Commodities Imported:	Consumer goods, raw materials, investment goods, fuels, diamonds, ships and aircraft
Principal Commodities Exported:	Agricultural products, manufactured goods, diamonds

For the last 75 years the Israeli Chamber of Shipping is representing the interests of all the maritime & shipping community in Israel. We have almost 60 active members in our organization representing liner - conventional – bulk services - brokers & agents. During the year of 2007 the Israeli Chamber of Shipping was involved with the following issues:

Ports

a. Improving of Port's services and facilities.

Both ports of Ashdod and Haifa were heavily congested during the year. Shipping industry and the local shippers and receivers were faced with abnormal losses and additional expenses caused by delays at the ports of vessels and cargo.

The Chamber together with other local organizations was involved in finding solutions to one of the worst congestions we ever had. Although there were improvements we cannot be too optimistic about the near future where much to our regret we expect continuous congestions at both Israeli Mediterranean ports.

b. The Israeli Chamber of Shipping is taking part together with the Israeli Ports Companies in the process of planning and developing the future new (or expanded) ports of Israel.

Ports' new tariff

The Chamber is now involved in the process of new Port's tariff structure proposed by the Government and is planned to be implemented during the year of 2008.

Training & Education

a. Together with the Israeli Maritime Law Association we have organized a seminar for more than 200 participants discussing the following topics:

- Unsafe Port Claims.
- General Average.
- Compulsory Pilotage.

b. The Chamber of Shipping together with the Israel Management Center is organizing courses for the entire shipping community in "Shipping Management & Operation". The second course will take place by coming December 2007.

ISPS Code

During the last year all Israel ports were certified for the ISPS Code.

Passengers & cruise vessels

During 2007 passengers & cruise vessels resumed their calls to Israel and the forecast for 2008/9 is a very optimistic one.

Paper Less

The Chamber is involved in the implementing of a "Paper Less" documentation process enabling delivery of goods to and from the ports through electronic transmission only. This project combines together the Freight Forwarders – Custom Clearing Agents – Customs Authorities – Port Companies – Truckers & Rail and the Shipping Agent Community.

Member Association Report — ITALY

Association: *FEDERAGENTI*

Membership: 580

Contact: *Mr. M. Paifermann*

Piazza GG Belli, 00153 ROME, Italy

Tel: (39081) 590019 Fax: (39081) 590025

e-mail: info@federagenti.it

website: www.federagenti.it



Population:	58,147,733
GDP 2005/6:	US\$ 1.756 trillion
Total Volume of Exports (2005/6):	US\$ 450.1 billion
Total Volume of Imports (2005/6):	US\$ 445.6 billion
Principal Commodities Imported:	engineering products, chemicals, transport equipment, energy products, minerals and non-ferrous metals, textiles and clothing; food, beverages, and tobacco
Principal Commodities Exported:	engineering products, textiles and clothing, production machinery, motor vehicles, transport equipment, chemicals; food, beverages and tobacco; minerals, and nonferrous metals

Federagenti comprises 24 port or regional federations, associating a total of about 600 companies in Italy, employing a total of about 8,000 direct employees, plus many external co-operators. The association has been developing several important initiatives during the past year under the chairmanship of Umberto Masucci and the most important actions of the last 12 months have been:

- **FEDERAGENTI Office in Rome:** acquisition of a new own office in Rome opposite the Italian Ministry of Transport. The office was opened last May and boasts a state of the art videoconference system connected with 10 local associations
- **YOUNG SHIPAGENTS:** Our Young Group (now comprising more than 100 members) continues to expand its membership and international profile. We very much hope other FONASBA members worldwide will follow our initiative.
- **YACHTING:** The important yacht section of Federagenti (comprising some 50 members who have their main or partial activities in the husbanding of yachts) continues to develop.
- **EDUCATION and TRAINING :** we have completed our project, with the first course organized by Ente Bilaterale Nazionale (the Federagenti/Unions joint entity) in co-operation with the Institute of Chartered Shipbrokers. We are now planning new activities and are seeing several new students joining Tutorship. We are glad to see that our Students have been successful with their attempt this year and hope this will continue in the future.
- **EXTERNAL COMMUNICATION:** we have continued our cooperation with ECOMUNICARE an Italian media company who take care of our internal and external communication. With their support we have established a new web site, a quarterly newsletter and have issued a number of press releases on Federagenti positions on main shipping and logistic issues

Italy's economic growth lagged behind neighbouring countries in 2006, due in part to a lack of flexibility in the labour markets coupled with reduced investment in transport infrastructure. The current Government has pledged to bridge this gap but this will be a long-term project. Italian ports have also only shown slight increases in cargo throughput when compared to competing countries in Mediterranean Europe such as France and Spain.

Vigorous local opposition is hampering major infrastructure projects vital to the development of the Italian transport network. The high-speed rail link across the north of the country is a case in point, a failure to make progress on this project will severely impact on the ability of Italian ports to attract cargo bound for northern Europe.

The significant problems associated with dredging have also impacted on the ability of Italian ports to cope with larger vessels and therefore capitalise on their position at the centre of the Mediterranean.

Last year reported that our new Government was moving in the right direction and we can now confirm that the trend is positive. As mentioned above, however, the pace is quite slow and economic constraints have prevented Government investing enough money to develop the new projects at the right speed.

Federagenti has been proactive in promoting shipping in Italy as well as the image of our industry with a view to increasing our profile locally. This has been primarily effected through continuous lobbying of local and national government and other authorities and today Federagenti is represented in all bodies connected with Logistics and Shipping.

Cooperation with all other shipping associations, such as Confitarma, the Italian Shipowners Association and Federazione del Mare, the Italian maritime cluster, has been enhanced in the past year, with us assuming a position more and more important in all Organizations. Federagenti has also continued to support the activities of the short sea promotion centre in Italy, including its cooperation with the Italian government on the new European Commission proposals on the liberalization of port services.

Contacts with our local Associations have been further intensified: last year, our Chairman has visited 9 local associations, in order to assure them of the full support of the national body and to have better and closer information on their activities.

Member Association Report — JAPAN

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

Membership: 114

Contact: *Mr. E. Itoh*

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website: www.jafsa.jp

Population	128,200,000
GDP 2005/6:	US\$ 4.505 Trillion
Total Volume of Exports:	US\$ 590.3 Billion
Total Volume of Imports:	US\$ 524.1 Billion
Principal Commodities Imported:	Machinery and equipment, fuels, foodstuffs, chemicals, textiles, raw materials
Principal Commodities Exported:	Transport equipment, motor vehicles, semi-conductors, electrical machinery, chemicals

JAFSA continues to be very active in protecting the interests of its members both within Japan and internationally. JAFSA try to get Government's and/or Public Corporations' Orders and/or Regulations, of which circulating to the Members.

The Association is represented on number of Government and/or Public corporations committees covering maritime issues including:

- Safe Navigation and pollution prevention in Tokyo Bay
- OPRC-HNS Convention committee for establishing New Regulations.
- The facilitation of EDI in Port/Harbours committee.
- The facilitation of Custom Clearance (Sea-NACCS) committee.
- Marine accident Prevention committee during constructing Haneda Airport
- Maintaining safe Navigation in Tokyo Bay while reclaim land from the sea at Port of Tokyo.

JAFSA undertook the following activities on 2nd half of last year and 1st half of this year.

- Monthly Board meeting.
- Issuing "JAFSA News" monthly in Japanese
- Seminar on "Activity of Bay-Pilot" at Yokohama, October 2006
- JAFSA Autumn Golf Competition, November 2006
- JAFSA annual Meeting/New Year Party, January 2007
- JAFSA Spring Golf Competition, May 2007.
- Seminar on "Manning/Ship Management" and "Port State Control" at Tokyo, April 2007.
- Seminar on "The facilitation on Port EDI and Custom Clearance" and Bear Party at Tokyo, July 2007.
- JAFSA also distributing "Japan Port Information 17-Edit." and Authorized Blank Format of "Tax Exemption for Export/Import Trade".
- JAFSA will be held Autumn Golf Competition at October and Seminar on "Japanese Consumption Tax and Exemption for Ocean-going Vessel" at November, 2007

JAFSA has 20th Anniversary on April 2008. In this connection, we will have small ceremony on 4th April at Hotel Intercontinental Tokyo Bay. Also JAFSA will continue to get new members for strengthen the association.

Member Association Report — KENYA

Association: *The Kenya Ships Agents Association*

Membership: 28

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website: www.jafsa.jp

Population:	36,913,721
GDP 2005/6:	US\$ 41.36 billion
Total Volume of Exports (2005/6):	US\$ 3.614 billion
Total Volume of Imports (2005/6):	US\$ 6.602 billion
Principal Commodities Imported:	Machinery and transportation equipment, petroleum products, motor vehicles, iron and steel, resins and plastics
Principal Commodities Exported:	Tea, horticultural products, coffee, petroleum products, fish, cement

During the past year, the port has been experiencing an upsurge of traffic beyond what had been projected. This has been partly due to diversion of traffic from neighbouring countries more so in containers. The result has been congestion at the container terminal of which there is only one. In the endeavour to clear this congestion, the port operator, KPA, has come up with some measures which it hoped will help ease the situation.

Towards the end of the second quarter of 2007 KPA, in consultation with some port users, decided to dedicate two berths outside the container terminal. This was done in an effort to reduce vessels' waiting time for the terminal. It was done with the understanding that vessels at those berths will use ships' own gear and in the event of gear breakdown necessitating shifting to the terminal proper, the affected vessel would not jump the waiters queue. This is still the position obtaining.

In concert with berth dedication, KPA also had consultations with some CFS operators, Kenya Ships Agents Association (KSAA), Kenya Revenue Authority (KRA) and Kenya International Freight & Warehousing Association (KIFWA) amongst other stakeholders with a view to transferring import containers to designated CFSs for storage before clearance by receivers. The idea was/is to use the CFSs as extensions of the port thereby increasing its holding capacity. This was seen as one of the ways of decongesting the port proper. The arrangement is due for implementation during the last quarter of 2007.

The much awaited on line cargo clearance is now in place though still with some teething problems. Hard copies of manifests are still being demanded by KRA as the legal instrument for electronic transaction of business is yet to be enacted. Together with this system which is controlled by KRA, KPA will soon be rolling out an electronic waterfront system to work in conjunction with the KRA system and hopefully this will further enhance faster clearance of cargo.

The directive for twenty-four hours, seven days port operations was given during the 2005/2006 budget speech but so far we have not gone fully 24/7. There are little matters still being sorted out here and there. All the same, stakeholders have started reaping some of the benefits of the extended hours of gates opening as quite a sizeable amount of cargo is getting shifted.

The private operator of the service (*Rift Valley Railways*), whilst trying hard to meet his targets, is still facing a lot of problems which were inherited from the previous operator. Some of these problems include; an old single track line, old locomotives and old rolling stock. As a first step they have embarked on the rehabilitation of the rolling stock while looking forward to acquiring new locomotives. Be that as it may, there has been a noticeable improvement in the service delivery and we hope it will only get better.

Presently, the port is operating at over 60% capacity which is an indicator that a new port is needed. In the meantime, KPA has plans to construct a new container terminal within the port of Mombasa which, if all goes well, should be operational by the first half of the next decade.

Member Association Report — LITHUANIA

Association: *The Lithuanian Shipbrokers & Agents Association*

Membership: 47

Contact: *Mr. V. Shilieka*

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website: www.llmaa.ot.il



Population:	3,575,439
GDP 2005/6:	US\$ 54.9 billion
Total Volume of Exports (2005/6):	US\$ 14.64 billion
Total Volume of Imports (2005/6):	US\$ 8.25 billion
Principals Commodities Imported:	Mineral products, machinery and equipment, transport equipment, chemicals, textiles and clothing, metals
Principal Commodities Exported:	Mineral products, textiles and clothing, machinery and equipment, chemicals, wood and wood products, foodstuffs

The Lithuanian Shipbrokers and Agents Association (LLMAA) is one of the most important organizations in shipping and maritime industry in Lithuania. Our main goal is to provide Association members with latest news, regulations and information on development of Lithuanian and global maritime policy and industry. We trust this enables our members to work efficiently and make well-informed decisions in their everyday activity. LLMAA is constantly cultivating with Klaipeda State seaport authorities, Ministry of transport and communications of the Republic of Lithuania and other organizations in order to assist the members in solving problems they face. All together we believe into the productive future with newest opportunities that are available in the Maritime and logistics industry.

LLMAA has 47 members, whose activities are agency, shipbroking, shipsupply, crewing and shipmanagement. We meet once per quarter on the General meeting to discuss and plan out the marketing for the future activities. The membership fee is fixed and payable twice per year. Our association is a member of Inter-Association council together with the associations of stevedores, Shipowners and Shiprepair/ Shipbuilding companies. The Chairman of this council – the President of one of associations – rotates each year. Our association is presented at the Port Development Council, chaired by the Minister of transport.

The attractive tradition has born some years ago to arrange a joint Christmas party, inviting Port and city officials and politicians to participate. Also this year it will be 10 years anniversary as basketball tournaments are held for members of association.

At present Klaipeda is the only seaport in Lithuania. Although for the time being Klaipeda State Seaport Authority is collaborating with Spanish Company "Alatec" which is preparing Sventoji Seaport reconstruction project. The developed infrastructure of the Port of Klaipeda, favourable geographic situation, sophisticated management system and continuous investment in the newest cargo handling equipment make it attractive in the field of transportation of containerized cargoes. The goods volumes transported in containers and trailers increase rapidly and the volumes are forecasted to further increase. Economic activities are mostly developed with such countries as Germany, UK, Russia and Scandinavian countries as well.

Member Association Report — MEXICO

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

Membership: 56

Contact: *Mr. M. Mena de la Peña*

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website: www.amanac.org.mx



Population:	108,700,891
GDP 2005/6:	US\$ 1.149 Trillion
Total Volume of Exports (2005/6):	US\$ 248 Billion
Total Volume of Imports (2005/6):	US\$ 253.1 Billion
Principal Commodities Imported:	Metalworking machines, steel mill products, agricultural machinery, electrical equipment, car parts for assembly, repair parts for motor vehicles, aircraft, and aircraft parts
Principal Commodities Exported:	Manufactured goods, oil and oil products, silver, fruits, vegetables, coffee, cotton

In the past year Mexico implemented a new advance cargo notification regulation. Rule 2.4.5 of the General Character Rules for Foreign Trade of 2007 requires that with effect from September 1st 2007 manifest information relating to all merchandise to be imported or exported via a Mexican port must be lodged with the Customs authorities 24 hours prior to loading. Clearly introduction of this new regulation has caused a certain amount of disruption amongst our members but we are pleased to report that the procedures have now been accepted and very few problems are now being encountered.

The association also participated in a number of meetings with the Mexican maritime authorities in relation to a revision of the port infrastructure tariffs following the introduction of this new regulation.

Rule 2.4.13 of the 2007 General Character Rules requires forwarders to provide manifest information for cargo shipped under house bills of lading and as a result AMANAC has also participated in a series of meetings with the Mexican forwarding industry in an endeavour to reach agreement on forwarders lodging the required information through AMANAC members. Rule 2.4.13 is currently suspended until October 31st 2007 to allow an agreed procedure for lodgement of manifest information by freight forwarders to be reached.

The association is also working hard to ensure that it is the recognised authority for qualifying and regulating all companies that wish to apply to the maritime authorities for registration as ship agents. A revised set of maritime regulations, Reglamento de la Ley de Navegación y Comercio Marítimo, are currently being developed and we are awaiting publication before taking this action forward.

AMANAC held its annual Ships Agents meeting in Acapulco in late September where the main topic was the development of international trade in Mexico.

Member Association Report — MOROCCO

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

Membership: 30

Contact: *Mr. A. Mantrach*

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website: www.apram.ma



Population:	33,757,175
GDP 2005/6 :	US\$ 152.5 billion
Total Volume of Exports (2005/6):	US\$ 11.72 billion
Total Volume of Imports (2005/6):	US\$ 21.22 billion
Principal Commodities Imported:	Crude petroleum, textile fabric, telecommunications equipment, wheat, gas and electricity, transistors, plastics
Principal Commodities Exported:	Clothing, fish, inorganic chemicals, transistors, crude minerals, fertilizers (including phosphates), petroleum products, fruits, vegetables

Legalisation of the Agency and Broking Professions — The bill that had to go through last April, is still pending due to other Parliament priorities. Consensual amendments prepared together with the Merchant Marine (MM), should be jointly defended in front of the Parliament once the bill is planned for the next sessions. Recently we had to respond to the new MM Director requirements, as to the distinction between “Agent Maritime” and “Consignataire de navires”, because the bill and the amendments are only mentioning the second one. With the support of our Legal Counsellor and FONASBA’s Members, we clarified to the MM that in English as well as in other foreign languages, one appellation “ship agent” is used for the two professions, given the fact that in practice they are not separable and completely mixed up.

Reform of the Harbour Sector — This is the topic in which our Association was mostly involved this year. We fixed on May a tariff for the new invoicing system of stevedoring on board and on shore to be applied by ship agents to the consignees (these operations are currently provided and invoiced to the shipping agent by the port terminal on a uniqueness basis). This system took place in order to secure a profit margin on the handling in favour of the shipping agent. We analysed the book of tariffs of Casablanca Port, issued by the Port Authority. Important observations on general clauses as well as on the tariffs themselves were made by APRAM. The Authority accepted an important part of them and amended the book accordingly. The other observations are still under discussion. APRAM wrote several letters to the port Authority about the monopoly of handling services, that is arising in some regional ports, against the main objective of the port reform which is to establish a free competition inside the ports itself and between the ports. The Association warned about the negative consequences and asked for corrective measures in some ports and to react in order to avoid similar situation in the latter.

Vocational Training Program — With the support of the PAE, European Commission Program, APRAM carried out on last May a training program in favour of 19 Sales Agents practicing in member-companies. Two other trainings will take place on next November related to Marketing and foreign trade topics.

APRAM Tariff — APRAM will issue its recommended Tariff of Agency fees and handling charges before the end of 2007. This tariff is an important key which will allow our Association to supervise tariff practices and act against dumping.

Free Movement of Containers — Presently, every imported or exported container needs to be customs cleared. Given the fact that this procedure is too wearing, APRAM suggested a simplification in 2006 to the customs authorities. In 2007, several meetings were held and led to approving the application of this system. Discussions will now start about the practice clauses and the obligations of the relevant parties to prepare the effective entering into force of the free movement of the containers.

Casablanca Port Congestion — APRAM played an important role in the mobilization of port authorities and operators against the unprecedented congestion at the port of Casablanca, that has arose as from February. Currently the situation is still unsatisfactory and meetings are continuing to establish lasting solutions.

APRAM Young Section — The Association Young Section was established on last July, beginning with 12 members, male and female, all aged less than 40 years old and practicing in member-companies as executives or managers. The young section will start working in 2008.

Visa of demurrage statements — Transfers of demurrages to ship-owners, due to the immobilisation of their containers inside the port, weren’t as from 2005. The handling operator refused to continue to issue the visa of the demurrage statements as required by the finance authorities’ laws. Thanks to APRAM’s actions and insistence, the Exchange Department agreed to cancel the obligation of this visa and granted another facility regarding the transfer of the statements by e-mail.

Executive Committee Meetings- The Committee decided to hold, as from January 2007, monthly meetings every first Thursday, in order to ensure a major participation of the members and therefore a better discussion and issues.

Member Association Report — ORAM, NETHERLANDS

Association: *ORAM, Amsterdam Regional Business Association, Sector Shipagents*

Membership: 42

Contact: *Mr. J. Stein*

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Population:	16,330,000
GDP 2005/6:	US\$ 529.1 Billion
Total Volume of Exports 2005/6:	US\$ 413.8 Billion
Total Volume of Imports 2005/6:	US\$ 373.8 Billion
Principal Commodities Imported:	Machinery and transport equipment, chemicals, fuels, foodstuffs, clothing
Principal Commodities Exported:	Machinery and equipment, chemicals, fuels, foodstuffs

ORAM represents ship agents in the Amsterdam Ports Area and is member of VNC (The Association of the Dutch Shipping Agents).

The Amsterdam port region has shown a substantial growth. The half year figures of 2007 were 6.7 percent up, in comparison with the first half year of 2006, especially due to coal and container throughput. In 2006 more than 9000 ships were calling at the Amsterdam port region.

In the past year a third coal terminal became operational. Vopak decided to establish a terminal in the Amsterdam port for oil products and several companies producing sustainable energy are planning to come to this port. The Ministry of Transport & Infrastructure decided to start exploring the options for a new lock.

ORAM participates in regional and national working groups concerning Custom matters. Issues like authorised economic operator and automated import systems are being discussed. Although the exact consequences for the agents are still not totally clear, ORAM has already started to inform the Amsterdam agents about these subjects.

Through ORAM the agents are involved with the development of the Port Community System in the Amsterdam port region. Also custom authorities are getting more involved. Development has been going slow for a while, but now progress is being made.

Recently a collaboration was started between PortNET, the Amsterdam system, and PortInfolink, the Rotterdam system. In the future the two systems will be connected. In practice this would possibly mean that ships calling at the Amsterdam port can be reported via PortInfolink, and the other way around.

ORAM is exploring the activities concerning the training agents through specific courses to members. In the Amsterdam region there is no specific training course available. This is becoming a problem while there is an increase of demand for qualified personnel. The local government has made the problems in the labour market in the port and industry sector a spearhead of the policy. Policymakers are making an inventory of labour demands, to be able to tackle problems in the future.

Member Association Report — VRC, NETHERLANDS

Association: *Vereniging van Rotterdamse Cargadoors (VRC)*

Membership: 115

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

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For statistical data, see the previous entry.

2006 was marked by expanding world trade, with China prominent as an exporting nation and because of its appetite for energy and raw materials. Rotterdam saw the arrival of the first 10,000 TEU ships. The ports in the north and south of the Netherlands benefited in their own way from the reviving economy and the overflow from the Port of Rotterdam.

Although foreseen, the expansion, in particular for import containers, caused some problems for the country's most important container terminal (Europe Combined Terminals). The difficulties were exacerbated by software problems, which severely disrupted logistics and shipping companies' schedules, with all the attendant financial consequences for those involved.

There were intensive contacts with the Port of Rotterdam Authority in 2006 regarding the structure and level of port dues. A new port dues structure, to which the Association of Rotterdam Shipbrokers and Agents (VRC) has contributed, but for which it is not responsible, will be introduced in 2008. As always, customs-related matters demanded considerable attention, and dominant worldwide security concerns mean that they are likely to continue to do so in the near future. Fortunately, the Dutch Customs are progressive and are investing in talks with China and others on Green Lanes, as well as on future scanning facilities.

Much effort has been put into relations with education and training institutes. Like other sectors, both inside and outside the port, we are encountering increasing scarcity on the labour market. It is then imperative for the shipbroking sector to project a clearer profile towards school and higher education students.

The Port of Rotterdam Authority is willing to invest in the port, and not only for containers, but also for bulk goods. They wish to establish a profile as an energy port, and are accordingly concentrating on bringing in LNG and biomass. The port is preparing for the future by creating additional land and quay capacity in the form of Maasvlakte II and the Euromax terminal (to be operational in 2009).

The infrastructure of the Dutch sea ports is giving some cause for concern, partly because of the expansion in cargo flows. The shipbroking organizations have a duty, together with the other occupational groups in the ports, to keep the infrastructure up to scratch, in order to guarantee those ports' competitive position. Reliable and stable ports have always been a feature of the Netherlands, and this must not change in the future. As an extension to this idea, it is also necessary to keep the mainports accessible. Doing so will be hampered not only by the increasing quantity of cargo, but also by the environmental constraints being set on the extension of activities. Even more than in past years, the coming period will demand a different attitude and a new way of thinking about finally establishing the necessary 24-hour economy.

Member Association Report — NORWAY

Association: *Norwegian Shipbrokers' Association*

Membership: 136

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Population:	4,681,100
GDP 2005/6:	US\$ 358 Billion
Total Volume of Exports (2005/6):	US\$ 167 Billion
Total Volume of Imports (2005/6):	US\$ 101 Billion
Principal Commodities Imported:	Vehicles, industrial machinery and equipment, machinery, and appliances, manufactured and consumer goods
Principal Commodities Exported:	Oil, gas, mineral oils industrial machinery and equipment, services (shipping)

Meetings

The annual seminar for our members involved in coastal and short sea trade was held near Trondheim the first weekend in February. The annual general meeting this year took place in Stavanger in May and was a success, both in terms of venue as well as the meeting, seminar and social activities. In addition we have arranged a seminar in Oslo and Bergen where our legal adviser focused on possible liabilities a shipbroker can encounter.

Activities

Our activities recently have been focused on the Nox-tax which the government introduced from January 1st 2007. Our main concern here is that foreign ship owners have to pay this tax through a Norwegian representative, which in practical terms mean the port agent – and this representative is jointly responsible for the payment of this tax and that the tax is assessed correctly. We have objected to this, but the matter is still not resolved.

We have been through our first year as a Distant Learning Centre for TutorShip, and are quite pleased with the result both in terms of number of students and the results. We had a total of 18 students registering for the Foundation Diploma and 6 for the Professional Exam. Of the 12 students that actually took the exams for the Foundation Diploma, 9 passed. Of the 6 students taking exams under the Professional Qualifying Exam scheme, 3 passed one or more exams.

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 as well as our legal consultant. Our agreement with an insurance company regarding mandatory pension plans have been a success. About half our members are currently in this scheme, and their combined savings are considerable. We work closely with other maritime organisations to promote the shipping interests in Norway.

Norwegian shipping

The number of ships in the Norwegian foreign going fleet continued to rise during the first quarter of 2007 and in fact increased to 1,795 ships, the highest number of Norwegian controlled ships ever recorded.

Building orders of ships for Norwegian account increased by 22 during the first quarter of 2007 to 378. Since the beginning of 2006 the increase is 78%. In addition 32 mobile offshore units were on order, an increase of seven units during first quarter. Norwegian orders for mobile offshore units amounted to about 26 per cent of the world's order book. There were 170 offshore service vessels on order and many of these are offshore construction vessels.

The total value of the ships and rigs on order continues its rising trend. During the second quarter of 2007 the total value rose to a total of US\$ 38 billion

The Norwegian yards accounted for the largest number of vessels on order from Norwegian shipping companies with 126 ships. This year South Korea ranked second with 63 ships followed by China with 62 ships, Japan with 23 ships and Spain with 19 ships.

Member Association Report — PORTUGAL

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

Membership: 102

Contact: *Mr. A. Belmar da Costa*

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website: www.agepor.pt



Population:	10,642,836
GDP 2005/6 (US\$):	US\$ 210,1 billion
Total Volume of Exports (2005/6):	US\$ 46,77 billion (FOB)
Total Volume of Imports (2005/6):	US\$ 67,74 billion (FOB)
Principal Commodities Imported:	Petroleum, agricultural products, machinery
Principal Commodities Exported:	Clothing, footwear, cork, paper and paper products, wine

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 almost one hundred members and playing an important role within the shipping community, AGEPOR is very active in protecting and continuously promoting the interests of the ship agency profession and activity both in 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 even more important as a partner for some of the specific national projects included in the Strategic Development Plan in Portugal for this sector area. In this sense AGEPOR and its members helped to build a computer network system philosophy involving the various entities in Lisbon, Leixões and Sines. This system is now beginning tested and in 2008 will become compulsory for the electronic transmission of ship requirements and manifest. The aim is to have the system working in all Portuguese ports and extend the participation of the Port Authorities, Customs and Ship agents to all the other players.

Also the role AGEPOR is playing within the Portuguese Shortsea Promotion Centre, holding the Vice - Presidency and Executive Direction entitles the Association to be one of the major experts of SSS in Portugal and a preferential partner/interlocutor in the development of the national policies towards the sustainable transport mobility.

Internationally AGEPOR is actively involved in all the activities of FONASBA/ECASBA being responsible for the Working Group of SSS and a member of the new crated Liner working Group, as well as occupying the Vice-Chairman of Ecasba. AGEPOR is also representing Portugal in the committees of Maritime Transport and Transport and Logistics within the International Chamber of Commerce. Finally belonging to the European Shortsea Network as Executive Director, AGEPOR will be holding the Presidency of ESN on the second half of 2007, playing an important role in all related to SSS Promotion and DGTREN.

For many years education and training have been priority projects within the Portuguese agency industry and AGEPOR has been developing and providing both internal and external courses (with several Organizations) which are proving very successful within our membership.

Recognizing that politicians, the mainstream press and the public are still not aware of the importance and role of the shipping industries to the national economy, AGEPOR has been lobbying continuously for better recognition at all levels, of the vital contribution that the industry makes, especially to a peripheral country. To this end, AGEPOR organizes each year a seminar and invites opinion leaders from different areas to speak about the importance of the maritime activities in Portugal and how do they think it should be improved and optimized. In 2007 the Seminar will be in November and will be discussing "Shipping – Economy and Sustainability".

Finally AGEPOR is promoting professionalism and ethic principles within the ships agency industry in order to protect the interests of its members and also to guarantee their survival in the future.

Member Association Report — SLOVENIA

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

Membership: 24

Contact: *Mr. E. Bandelj*

Ferarrska 2, 6000 KOPER, Slovenia

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website:

Population:	2,013,597
GDP 2005/6	US\$ 47.01 Billion
Total Volume of Exports (2005/6):	US\$ 21.85 Billion
Total Value of Imports (2005/6):	US\$ 23.59 Billion
Principal Commodities Imported:	Fuel, cereals and food products, motor vehicles, textiles
Principal Commodities Exported:	Wood products, industrial goods and domestic appliances

During the period under review, the Slovenian economy grew by 4.5 %, inflation was 2.3% and unemployment, as defined by the International Labour Organisation, was 6%.

In the maritime field, the Slovenian authorities have drafted an internal green paper on transport policy which is based on the current European Commission green paper on maritime policy but it also includes a number of references to the agency industry. The Slovenian Parliament has now accepted the principle of a local tonnage tax and this will now come into force on January 1st 2008. As we see advantages for the Slovenian merchant fleet this will also benefit Slovenian seamen who will benefit from reduced VAT on their income tax contributions.

The port of Koper continues to flourish with cargo throughput increasing, particularly in the motor vehicle and container sectors. The Port has also been designated as a BIP for the Schengen regime.

As an association we are very pleased that after many years of action the Government has agreed to a licensing scheme for maritime agents. A number of issues, including establishing minimum standards for agents and the establishment of a licensing authority, remain to be completed but we are hopeful these will be resolved as soon as possible.

The Slovenian agency community is now able to exchange inbound cargo manifest information with customs electronically and we anticipate that the exchange of outbound information will be available shortly. Following that we hope that the exchange of information with all state authorities will be possible at the earliest opportunity.

Unfortunately attempts to develop a Slovenian maritime cluster failed earlier this year but a transport platform is expected to be established in the coming months.

Finally, the Slovenian Chamber of Commerce is currently undergoing a reorganisation and we are awaiting a decision as to which sector our association will join.

Member Association Report — SOUTH AFRICA

Association: *South African Association of Ship Operators And Agents (SAASOA)*

Membership: 124

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website:

Population:	43,997, 828
GDP 2005/6:	US\$ 587.5 Billion
Total Volume of Exports:	US\$ 59.15 Billion
Total Volume of Imports:	US\$ 61.53 Billion
Principal Commodities Imported:	Machinery and equipment, chemicals, petroleum products, scientific instruments, foodstuffs
Principal Commodities Exported:	Gold, diamonds, platinum, other metals and minerals, machinery and equipment

The Members of ASABOSA cover all the major South African ports, and Johannesburg. In its role as the official and recognised mouthpiece for the nations ship broking and agency industries, the Association liaises on a regular basis with the South African government and maritime regulatory authorities, including Transnet, and is always closely involved in Black Economic Empowerment Government Forum initiatives. It also works closely with the South African branch of the Institute of Chartered Shipbrokers (ICS).

Current issues on which ASABOSA represents its member's views include:

- Investigating methods of re-attracting the valuable bunker business, much of which has been lost to other ports, both near and far, due to varying reason, including unnecessary high port charges, delays in berthing, shortage of bunker berths, slow pipeline pumping rates, shortage of bunker barges, and congestion at some of the berths, where liquid cargoes are also worked. There is a major double hulled barge building programme in hand, as the pipelines at the major ports of Durban, Richards Bay and Cape Town are rapidly becoming time constrained, are very old, with no replacement planned. There is a constant shortage of bunker fuel for various reasons, allied to both annual shutdowns involving the main oil refineries, as well as no real storage facilities. The Oil Majors excess export bunker fuel, which is a by product of their main process being the provision of white fuels, when they perceive excess product. Meetings are held almost constantly to try and resolve all of these issues.
- We have managed to reverse, to some degree, the business of port authority, and private drydocks being utilised again, after some years of being in the doldrums, again due to high costs, but abetted by dockyard inadequacies, and poor staff training. Cape Town in particular has attracted some new business recently.
- There are grandiose plans for building a major new Container Terminal at the port of Durban in the Bayhead area, which if approved by various Industries, will have some serious affect on drydocking facilities currently available at Durban. It will however, address current inadequate container facilities at Africa's biggest port. Another recent Durban development has been the reconstruction of Pier 1 as a new Container Terminal at the port.
- There are major Transnet (of which NPA is a division) plans involving large port expansion at all of the main ports, as well as massive capital expenditure by Transnet on improving rail facilities to and from the ports.
- Container handling problems, primarily at the main port of Durban, are being addressed by the Association, as well as port authorities, and all liner principals. Our efforts have contributed to better handling performance that in recent years, but we are still not yet quite up to International standards.

ASABOSA, and other similar Associations, are in the process of a reorganization, to become one, under the umbrella name of SAASOA (South African Association of Ship Operators And Agents). It is anticipated that SAASOA will be able to speak with more authority than currently, to the various Government (and private) Organizations that we deal with on a daily basis. s reported last year, and briefly referred to above, the NPA revealed its proposals for short and long term development at all the main ports, but further and more far reaching plans are now on the cards. Major development work will take place at Durban, Saldanha Bay, Richards Bay, Cape Town and the new port of Coega, close to Port Elizabeth. The National Plan involves extremely substantial Transnet expenditure.

Problems exist, and persist, but are being discussed, and often involve inefficiencies and poor performance by Transnet, especially its Rail operations. The National Rail system, used to carry much of the Republics cargo to and from the hinterland and the ports, but is now suffering from road haulage competition to a major degree. Transnet have recently embarked on a massive expenditure programme involving new rolling stock, including locomotives, and a major revitalisation, and electrification of the railroad system, to try and re-attract the cargo previously carried, back to rail from road haulage.

Member Association Report — SPAIN

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

Membership: 143

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Population:	45,116,894
GDP 2005/6:	US\$ 1.109 Trillion
Total Volume of Exports (2005/6):	US\$ 222.1 Billion
Total Volume of Imports (2005/6):	US\$ 324.4 Billion
Principal Commodities Imported:	Machinery and equipment, fuels, chemicals, semi-finished goods, foodstuffs, consumer goods, measuring and medical control instruments
Principal Commodities Exported:	Machinery, motor vehicles; foodstuffs, pharmaceuticals, medicines, other consumer goods

In the Extraordinary General Assembly of ANESCO held on January 17, 2007, Mr. Francisco Oviedo and Mr. Iñaki Echeverría were elected as President and Vicepresident of the Assembly of Ship Agencies, respectively.

Formative activities for recycling and knowledge extension for staff of ship agencies continue to take place, having been held in the Port of Valencia a course on Ship Agent's Documentation, imparted by Fundación Valenciaport with the cooperation of a Group, of which the Valencia Ship Agents Association is a member.

Likewise, the Barcelona Ship Agents Association imparted an advanced-level course on shipping business.

The development and application of the Short Sea Shipping has been a motive of an intense activity in the sector, having ANESCO, through the Spanish Association for promotion of SSS, participated in the informative meeting of the ACCESS Project – within the Marco Polo Program – in Alicante last January.

In March, UNIPORT organized, in Bilbao, an event on Short Sea Shipping and Motorways of the Sea. Later on, a Forum on Motorways of the Sea and Port Development took place in Lisbon.

On April 3, PORTEL and Ports of Galicia presented in Madrid the Technological Platform of ATMOS Project. In May, Mr. Iñaki Echeverría, Vicepresident of the Ship Agencies' Assembly in ANESCO, attended the seminar organized by ECASBA in Brussels.

In the university scope, from 19th to 22nd of may, a workshop was organized aboard the vessel Autoritas, of the European School of SSS, for pupils from the U.P.C. Master on Shipping Business, from the Nautics School of Barcelona and from Fundación Valenciaport.

The Association for Promotion of Port of Tarragona, with the cooperation of the local Association of Ship Agents, organized the III Symposium on Intermodal Logistics on June 21 and 22.

Member Association Report — SWEDEN

Association: *The Swedish Shipbrokers' Association*

Membership: 145

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Population:	9,031,800
GDP 2005/6:	US\$ 373.2 Billion
Total Volume of Exports (2005/6):	US\$ 173.9 Billion
Total Volume of Imports (2005/6):	US\$ 157.8 Billion
Principal Commodities Imported:	Machinery, petroleum and petroleum products, chemicals, motor vehicles, iron and steel, foodstuffs, clothing
Principal Commodities Exported:	Machinery, motor vehicles, paper products, pulp and wood, iron and steel products, chemicals

General Shipping Climate

Even this year was an all-time high both for Swedish ports and for Swedish ship owners, all due to the global boom in shipping. Now the only problem the industry has to cope with is the shortage of seamen.

Education

Education is a further major action area for the Association and we are continuing our successful cooperation with the Institute of Chartered Shipbrokers in London.

In our forth academic year as a Distance Learning Centre we have had 32 students, studying for Qualifying Examinations and Foundation Diplomas. We have also had one day training courses in collaboration with ICS. 16 students took part in our Liner Business course.

Members' meetings

There have been two over the past year. 50 members attended the Association's autumn meeting in the Swedish Parliament! The day included a lunch with MPs, a guided tour given by an MP and a seminar. Even the AGM in Västerås in April, was a success. 90 members attended the meeting.

Maritime Administration and the Swedish Coast Guard

The Maritime Administration has held its promise to not raise the pilot fee; it has been at the same level since 2005. But now we are facing shortage of pilots in the right port at the right time, which often means extra waiting costs for the ship owners. We are working hard to find a suitable solution to the problem.

The "battle" against the Swedish Coast Guard is now over, thanks to EU who withdrew the 24 hours rule. Now port agents can submit the mandatory Schengen forms just before the ship arrive at the port. Most port agents still submit the forms 24 hours ahead, but no police is there to question any mistakes according to that procedure anymore.

During 2006-07 the Association has been involved in several cases where "old" police reports have led to court, but we have won in all cases!

Statistics

Total in the Swedish Register: 198 ships (1000 GRT or over) 2,382,754 DWT

By type: bulk carrier 8, cargo 28, chemical tanker 47, container 5, passenger 3, passenger/cargo 36, petroleum tanker 15, roll on/roll off 31, specialized tanker 4, vehicle carrier 21.

Registered in other countries: 161

Member Association Report — UNITED STATES OF AMERICA

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

Membership: 169

Contact: *Mrs. J. Cardona*

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e-mail: asba@asba.org

website: www.asba.org



Population:	301,139,947
GDP 2005/6:	US\$ 13.13 Trillion
Total Volume of Exports (2005/6):	US\$ 1,024 Trillion
Total Volume of Imports (2005/6):	US\$ 1,869 Trillion
Principal Commodities Imported:	Agricultural products, industrial supplies, capital goods, consumer goods
Principal Commodities Exported:	Agricultural products, industrial supplies, capital goods, consumer goods

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.

Our Agent Members completed their annual review for ASBA's Agent Certification. We are proud that ASBA's Guidelines for Certification, full details available on our website, has provided the impetus for FONASBA's initiative to delineate an international Quality Standard for its member agents. The challenge moving forward is to convince principals that appointment of quality agent providers is critical to hassle free port calls. We have enjoyed some expansion of our agent membership as principals begin to appreciate the advantages of requiring that their agents be "ASBA Certified". ASBA participated in INTERTANKO's Tanker Event in March 2007. Mrs. Cardona delivered a presentation to the Associate Member Committee, "Shouldn't Principals Vet Agents like Charterers Vet Ships". ASBA Agents also joined INTERTANKO's Poseidon Challenge by pledging "Quality Agents to achieve Zero Detentions".

ASBA's Charter Party and Documentary Committee is proud to announce the release of "ASBACHEMVOY". ASBACHEMVOY development and release was lead by Soren Wolmar of Quincannon Associates, Inc. Given the popularity of the use of ASBATANKVOY by the Chemical trade, the committee decided to simply rework that form by deleting and incorporating the changes found in typical chemical voyage charter parties. ASBACHEMVOY will be released in electronic format on ASBA's Charter Party Editor.

ASBA continues to monitor legislative activities in Washington, D.C. that will affect members. ASBA remains an active participant in the National Association of Maritime Organizations (NAMO) with whom we have partnered to bring about U.S. government awareness of the uniqueness of the bulk trades who are typically not represented at maritime roundtables. All members are aware and concerned about the recently approved legislation that requires 100% of all containers to be scanned at the load port prior to arrival at any U.S. port within 5 years. FONASBA has been engaged with this issue and has urged members to be engaged with officials in their countries. ASBA is proud to have sent two participants to the CIANAM Annual Meeting held in Peru in April. CIANAM will become the maritime voice of the Americas in the years to come.

ASBA's educational offerings have been well subscribed in 2006 & 2007. Our course list includes the Home Study Course: Basic Principles of Chartering and our distance learning courses; Shipbroking and Chartered Vessel Operations, Maritime Law and Commercial Trade Transactions. The Business of Shipping Intensive, 2-day live seminar, will be offered in Houston, Chicago, New Orleans and Seattle this fall.

The ASBA Annual Cargo Conference held in Miami, Florida the first week in October continues to grow in popularity. The conference committee works diligently each year to present a program with a broad range of speakers presenting the cargoes that have been of particular interest in that year. Delegates enjoy the benefits afforded by the conference size, averaging just over 135 delegates, as well as sponsored social events which provide ample time to fraternize with the speakers and other delegates.

For further information on FONASBA,
its aims, objectives and membership,
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