

THE FEDERATION OF
NATIONAL ASSOCIATIONS OF SHIP
BROKERS AND AGENTS



FONASBA



FONASBA

ANNUAL
REPORT

2007/8

This report covers the activities of FONASBA, its committees and member associations during the period:

July 2007 to June 2008

Cover Photograph: Buenos Aires, Argentina, location for the 2007 Annual Meeting.

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



The two years of my Presidency seem to have passed by very quickly but the calendar doesn't lie and now I must prepare to hand over the badge of office to my successor, who will be elected at the Council Meeting in Opatija in October.

As I wrote in this publication last year, the development of our Federation is constant and, I hope, extremely beneficial for our members. The rapid progress that we have seen in recent years in Latin and South America, where our regional committee CIANAM is very active, was further enhanced at the very successful and extremely enjoyable Annual Meeting in Buenos Aires with the admission to Full membership of the Asociacion Peruana de Agentes Maritimos (APAM) of Lima, Peru. Further afield, we have also welcomed a new Associate member in Mauritania, Teissir Shipping SA of Nouakchott and just recently expanded our coverage in the eastern Mediterranean with the election of the Chamber of Shipping of Syria as Full members. Our commitment to increasing our membership – and thereby the influence of FONASBA on the world stage – will continue into my predecessor's term of office with further expansion, particularly into the Far East, where our membership is, regrettably for such a major maritime cluster, rather weaker than we believe it should be.

The endorsement of FONASBA's consultative status with IMO at the Organisation's Assembly in November last year was extremely welcome and gave us the green light to start making a positive contribution to the Organisation's work, beginning with input to the group working on enhancing the reception and disposal of ship and cargo generated waste.

The FONASBA Quality Standard initiative was unanimously approved by Council last year and all FONASBA members are being encouraged to develop the relevant quality criteria within their own associations. A more detailed report on the project is provided on pages 17 and 18 and our congratulations go to Centro de Navegacion, the Institute of Chartered Shipbrokers and ASBA for being the first associations to be granted the Standard.

Although FONASBA continues to expand away from its European origins, what happens in Brussels remains of vital importance to all of us and our European committee, ECASBA, continues to maintain very close contact with the European Commission and so ensures that all our member associations, within Europe and without, are kept fully advised of developments. Having very ably led ECASBA for the past six years, Gunnar Heinonen will be stepping down as Chairman at the Opatija meeting. Also stepping down in October is Grete Noer, who has very ably led the Chartering & Documentary Committee since 2000. I would like to record my thanks, and those of everyone within FONASBA, for their excellent contributions to the work of both committees.

Finally, I would also like to record my grateful thanks to my fellow members of the Executive Committee, our General Manager and all our member associations for their help and support during my Presidency. FONASBA is above all a team effort and whilst I have been privileged to have led the Federation for the past two years, the progress we have made is much more a reflection of the commitment and enthusiasm of everyone involved.

I now look forward to supporting the incoming President in the same generous way that Philip Wood supported me and to continuing to play a role, albeit behind the scenes, for the next two years.

MARIO J.L. FROIO
PRESIDENT

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



Probably the highlight of FONASBA's work programme for the year just finished was the approval of the draft FONASBA Quality Standard by Council at our Buenos Aires meeting last October. This gave us the green light both to start implementing the programme within our membership and to begin promoting it to the international maritime community. Clearly, for the Standard to gain widespread acceptance it needs to be widely adopted by the membership and at the same time recognised, and strongly supported, by shipowners and operators, charterers, regulatory authorities and others who come into contact with the agency and broking sectors. A more detailed report on the Standard and the campaign to promote it is provided on pages 17 and 18 but suffice it to say here that we are very pleased with the progress made to date, and in particular the support given by our colleagues at INTERTANKO and Intercargo and also for the excellent coverage from the internationally renowned and respected industry commentator Michael Grey in Lloyd's List. Uptake amongst our member associations is steadily growing. As this article is written, our associations in Argentina, the UK and the USA have had their quality criteria approved by our Executive Committee and a number of others are currently in the process of developing similar criteria within their own memberships.

Our relationships with other industry bodies remain strong. As stated in the relevant sections of this publication, we are continuing to work closely with all the major associations on relevant issues. In February the President, Mario Froio, accompanied by Immediate President Philip J. Wood FICS and myself met with IMO Secretary-General Eleftherios Mitropoulos to formally introduce FONASBA to him and to discuss FONASBA's contribution to the Organisation's work. It was agreed that our efforts would be best directed towards providing input to the technical committees and working groups and, following the 16th session of the Flag State Implementation Committee (FSI), FONASBA is now a contributing member of the correspondence group on port waste reception facilities, building on our previous contributions to INTERTANKO's Poseidon Challenge initiative.

There was a significant outpouring of maritime related paperwork from the European Commission in October last year with the publication of communications on Logistics, Maritime and Port Policy and since then ECASBA has been in regular correspondence with the Commission in order to ensure the views and concerns of our members are noted and, we hope, taken into consideration. A full report on our European activity over the past year, including our very successful 3rd Brussels seminar, starts on page 15.

Unfortunately in January John Barclay FICS, one of the most influential people to have graced the Federation, passed away. John was President of FONASBA from 1995 to 1997 and was made one of the first two Honorary Members, along with the late John Besman, in October 2000. John's enthusiasm and support for FONASBA and his knowledge of how it functioned were unrivalled. He was also instrumental in bringing FONASBA back to its original home in London in 2000 and therefore also partly responsible for my being appointed General Manager in February of the same year. It goes without saying that John, and his input to our work, will be sadly missed.

So, another very active and, we hope, productive year comes to a close. FONASBA has further expanded and enhanced its influence within the maritime industry and we shall continue to do so in the coming year and beyond.



FONASBA MEMBERSHIP BY COUNTRY (at August 2008)

(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)	MSCL 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)	AMCF, 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
Lithuania	The Lithuanian Shipbrokers & Agents Association, KLAIPEDA



FONASBA MEMBERSHIP BY COUNTRY (at August 2008)

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

EUROPE contd..

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
Syria	The Syrian Chamber of Shipping, LATTAKIA
Sudan (A)	Sea Pride Enterprises, PORT SUDAN
Yemen (A)	Middle East Shipping Co. Ltd. HODDEIDAH

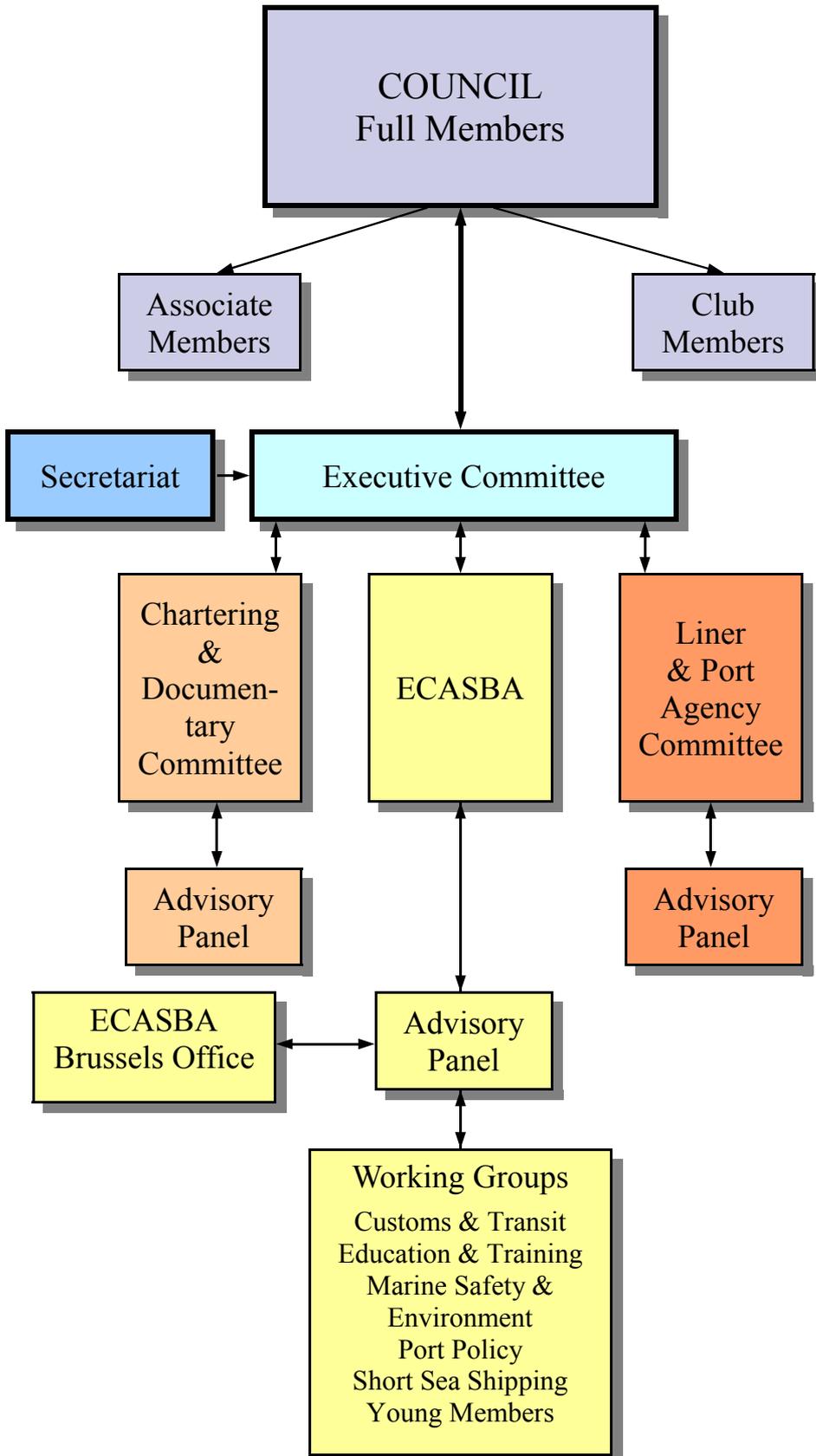
SOUTH AMERICA

Argentina	Centro de Navegación, BUENOS AIRES
Brazil	FENAMAR, SANTOS
Peru	Asociacion Peruana de Agentes Maritimos (APAM), LIMA
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. The Council meets at the Annual Meeting, which is held in October in the country of domicile of a Full Member. Each country represented has one vote, that vote being shared if there is more than one association in a particular country. 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***



As presaged in last year's report, the Commission unveiled three major policies within a week in October last year, covering logistics, maritime and port policy. During the preceding months, ECASBA had provided input to the exploratory consultation exercises and the policies themselves were published during, and just after, our Annual Meeting in Buenos Aires. In addition, the Commission issued a progress report on the NAIADES project for inland waterways and ECASBA contributed to a major report by DG-TAXUD into the effects of the proposed 100% scanning of US-bound containers.

With the exception of the Maritime Policy communication we have commented on all these issues and summarise our views on the following paragraphs.

The Logistics Communication and Action Plan covered a number of issues from the enhanced use of electronic systems ("e-freight" and intelligent transport systems) through sustainable quality and efficiency to vehicle dimensions and loading weights and urban freight transport logistics. Also included within the logistics sphere are the Common European Maritime Space Without Barriers and the Motorways of the Sea programme.

Whilst ECASBA fully supports the increased use of electronic systems as a means to enhance the exchange of information within the logistics chain and in other areas, we believe that the Commission is placing too much emphasis on "e-" in all sectors of the maritime transport sector, to the detriment of action in other areas. Increasing the effectiveness and efficiency of the European logistics industry also requires the provision of appropriate and adequate infrastructure, the removal of administrative bottlenecks and the provision of well-trained and educated staff. We believe that these issues are in fact of a higher priority than the expanded use of electronic systems that, by themselves, will not move a single tonne of cargo.

When first announced, ECASBA and other industry organisations believed that the urgent need to reduce the administrative burden on maritime transport in order to bring it down to the same level as land-based transport by road and rail would be addressed by the Common European Maritime Space Without Barriers initiative. Unfortunately however, and in spite of strong public support from the industry, the project has stalled. We believe this is due in part to resistance from the customs authorities of some member states. Clearly any reduction in customs formalities will mean less work for customs officers and perhaps this is where some of the resistance lies. Given its considerable value to our members, ECASBA will continue to press the Commission to ensure this vital initiative goes forward.

On the contrary, the Motorways of the Sea initiative continues to enjoy considerable support from the Commission and Member States and this commitment was reinforced late last year with the appointment of Professor Luis Valente de Oliveira as the Project Coordinator. Unfortunately there remains considerable confusion as to exactly what a Motorway of the Sea is, how one can be established without raising issues of distortion of competition, and what can this project achieve that short sea shipping cannot. Our further concern that the European Shortsea Network of promotion centres remains excluded from European funding also remains high on our agenda and we take every opportunity to raise our concerns with DG-TREN.

The Maritime Policy Communication was the distillation of some 500 responses to the year-long public consultation from an extremely wide range of respondents. As reported in the previous issue of this publication, ECASBA has been very closely involved in the development of this policy from the beginning and enjoys very good relations with the office of Commissioner Borg, under whose aegis this projects falls. The Communication covered a very wide range of subjects and clearly there is a need to prioritise the actions, so in the Communication the Commission committed itself to issue an Action Plan in November 2008 and accordingly ECASBA is withholding its comments until this has been published.

In order to better effect the implementation of the Maritime Policy initiative, the Maritime Policy Taskforce has been disbanded and the former Directorate-General of Fisheries and Maritime Affairs (DG-FISH) has been reorganised and re-designated DG-MARE, with the emphasis on maritime affairs.

The Communication on Port Policy included the very welcome – and somewhat belated – recognition that, taking into account the legislative and fiscal environment in which it operates, the European port industry is already very efficient and so the proposals in the previous two port packages to introduce a one size fits all policy and to harmonise port operations and management have been dropped. The Commission is also now supporting the use of "soft law", that is using guidelines not legislation, and also the better application of existing law and upholding Treaty obligations in achieving the policy objectives.

Continued on page 16

ANOTHER YEAR OF POSITIVE PROGRESS IN EUROPE

Initial industry pleasure at the Communication's commitment to introducing state aid guidelines has subsequently been dimmed by the revelation that DG-LEGAL is reviewing the proposals and so the expected August publication date has now been put back indefinitely.

One of ECASBA's other criticisms, echoed by other industry organisations, is that the Communication continues to be predicated on the northern European container port sector, with little reference to smaller ports and those operating in the bulk sector, both of which are vital to the future of the European port industry.

Since publication of the report, a number of changes have taken place within DG-TREN, with our colleague and friend Jean Trestour giving up the port policy portfolio to concentrate on Marco Polo, Motorways of the Sea and inland navigation and Dimitrios Theologitis has taken over his port policy responsibilities. The other major change has seen Commission Vice-President Jacques Barrot move from Transport Commissioner to Justice and, as is usual, his cabinet has also moved. We were therefore required to say "au revoir" to his Deputy Head of Cabinet, Mrs. Kerstin Jorna, with whom we enjoyed an excellent working relationship. Commissioner Barrot's successor at Transport was recently named as Antonio Tajani, from Italy and we hope to have the opportunity of meeting him later this year.

One of the issues that we regularly discussed with Mrs. Jorna was the NAIADES project to promote use of inland waterways and the first Progress Report was eagerly awaited. Unfortunately this was something of a disappointment as it was clear very little progress had indeed been made and that which had been made was primarily located in the already well-developed and efficient northern European sector, along the Rhine/Maas corridors. With the assistance of our colleagues in Hungary, we raised a number of issues with the Commission in relation to the lack of progress on the Danube, on fleet renewal and on infrastructure development, none of which are adequately addressed in the report.

ECASBA has long been an active participant in Europe's actions to oppose the introduction of 100% scanning for containers bound for the United States. Expressing our views on the subject to Taxation and Customs Union Commissioner Kovacs led to a meeting with him in November 2007, at which we were invited to provide input to a letter he was writing to the US Government setting out the views of the EU and European industry on the matter. ECASBA's contribution was a detailed analysis of the outcome of the procedural trials being carried out in Southampton – chosen, we believe because some 97% of containers come into the port by road and are thus very easy to scan – and we also expressed our opinion on the likely impact on a port where deliveries of containers are truly multimodal. For our example we chose Rotterdam, where approximately 40% of boxes arrive by short sea and therefore will require additional handling as part of the scanning process. Our input was greatly appreciated by the Commission and indeed quoted in the report.

June saw our third Brussels seminar, which provided another opportunity for our members to meet and exchange views with the Commission on issues of major importance to our sector. In a change to the format this year, the sessions on Customs and Logistics, Maritime and Port policy each included a discussion forum during which our Commission guests exchanged views with delegates. This was very well-received and both sides enjoyed a very interesting and lively debate. Our keynote speaker this year was Commissioner Joe Borg of DG-MARE. Unfortunately he was not able to join us for dinner but our speakers, Maria-Manuela Cabral and Peter Kovacs of DG-TAXUD and Ben van Houtte from DG-TREN, along with Professor Valente de Oliveira were able to participate. The event was a major success and an excellent way to end another busy and productive year within ECASBA.

There are a number of major changes on the way in the next twelve months. The election of a new Commission in November 2009 is likely to precipitate a wave of changes within the Commission Directorates General and the cabinets. This process will begin, albeit slowly, in the first half of next year and so will have an effect on ECASBA's activities. Some of our friends will depart the Commission, others will move internally and so there will be much work for ECASBA to do ahead of the changes to ensure we can maintain our current excellent relationship and contacts with the Commission.

As you all know by now I will step down as Chairman of ECASBA at the Opatija Annual Meeting after having been in the chair for six years. I am very pleased to say that ECASBA today enjoys excellent relations to all relevant EU institutions at all levels. Needless to say, however, keeping up this state of affairs requires continuing, constructive and professional action on our part. Only we ourselves can make sure that we are seen, heard and respected where it matters and when it matters.

Finally, my warm and sincere thanks go to all Members, to the Executive Committee, to the Advisory Panel, to Diego Teurelinx and to Jonathan Williams for their support and for the active role each of them has played in ECASBA's work.

I now leave ECASBA in the safe and capable hands of my successor, who will be elected at the Annual Meeting in Opatija in October, and offer him my fullest possible support in the months ahead.

***RAISING THE BAR —
THE FONASBA QUALITY
STANDARD***

***Jonathan C. Williams FICS
General Manager***



The FONASBA Quality Standard exists to allow principals and also other interested parties to ascertain quickly if a ship agent or shipbroker is providing a professional level of service to its clients, that its staff are adequately trained and that it is appropriately resourced and is financially sound. Accordingly any company wishing to apply for the Standard must:

- be a member of a FONASBA national association or be an Associate or Club Member of FONASBA
- prove that it is committed to ensuring that its staff are adequately trained, or better still professionally qualified and
- demonstrate that it complies with the financial regulations of the country in which it is based.

With a year having passed since the FONASBA Quality Standard was approved by Council in Buenos Aires, it is opportune to report on the progress of the project since then.

Approval by Council was a relatively straightforward affair with only minor changes to the draft text – primarily in the area of the member association’s responsibility to oversee the activities of its members – being required before it was approved unanimously.

Immediately thereafter, the Secretariat embarked on two parallel courses of action. The first was to encourage all FONASBA members to begin work on introducing the Standard criteria within their membership and the second to generate the support necessary from other industry organisations to ensure its acceptance within the wider industry.

Progress on the first course has been relatively slow with, as this Annual Report is published, only three national associations having received approval for their Quality Criteria. To a significant extent the Standard drew on the pre-existing national criteria operated by both ASBA in the US and the Institute of Chartered Shipbrokers in the UK in establishing its overall framework and so it came as no surprise that these two bodies were the first to have their criteria – namely the ASBA Quality Approval scheme and the ICS Company Membership requirements – approved by FONASBA’s Executive Committee. Both organisations subsequently sought applications for the Quality Standard from within their own memberships and to date nearly 30 companies in the US and 16 in the United Kingdom have been granted the right to describe themselves as FONASBA Quality Approved companies.

The third association to achieve accreditation, and the first to introduce Quality Standard-specific criteria from scratch, was Centro de Navegacion of Argentina. As we go to publication, we are awaiting further information from Centro as to which of their member companies have applied for accreditation.

Although many companies that adopted the ISO 9002 Quality management standard in the late 1990’s have now abandoned it, there remain some who maintain the discipline, now renamed ISO 9001-2000, and the FONASBA Quality Standard recognises this fact and will, on application from the member association,

DEVELOPING THE FONASBA QUALITY STANDARD

grant accreditation to those companies. At the time of writing, we are awaiting advice from our member in Spain, ANESCO, where a significant majority of its agent members do maintain the ISO standard.

The active participation of the national associations within the project is vital. Given the variations in membership criteria across the Federation, and also the wide variety of national financial reporting regimes, the national association is best placed to develop the draft criteria appropriate to amalgamate the needs of both the quality standard and local regulations and requirements. Once the proposed criteria have been drafted, FONASBA's governing Executive Committee will determine whether or not they meet the requirements of the Standard and if so authorise the association to invite companies within its membership to apply for accreditation. Thereafter, the role of the national association extends to ensuring the accredited companies continue to meet the Standard criteria at all times. Should a company fail to maintain those criteria, in spite of support from the national association, then the association is required to notify FONASBA so that the accreditation should be withdrawn.

Clearly, in order to succeed, any project such as this must secure support from the rest of the maritime community and as stated earlier in the article, FONASBA undertook this exercise in parallel with promoting the standard internally. To date the initiative has been strongly supported by INTERTANKO, who invited FONASBA to speak on the project at its 2008 Tanker Event in Istanbul, and Intercargo. It was also the subject of two very complimentary articles by the well-respected industry commentator Michael Grey in Lloyd's List in April 2008. As this article is written, FONASBA has also been invited to speak at intermediary insurer ITIC's Forum in London in October 2008.

This project is very much on-going and there remains work to be done both to increase the number of member associations that have developed and achieved accreditation for their quality criteria and also in increasing industry support for its aims and objectives.



Evidence of valued support for the Quality Standard project from across the industry and in the maritime press

FONASBA ANNUAL MEETING 2007

The 2007 Annual Meeting moved into the southern hemisphere for the first time since 2002, with the event taking place in Buenos Aires, hosted by our Argentine association, Centro de Navegacion. More than 100 delegates and partners made the trip to Buenos Aires with the members of FONASBA South American range committee, CIANAM, being particularly well represented.

The work programme followed the usual pattern with the meetings of the executive boards of ECASBA and FONASBA preceding the Plenary meetings of the three main committees, ECASBA, Chartering & Documentary and Liner & Port Agency, and culminating in the Council Meeting.

This year the presentation to the ECASBA Plenary meeting by Brussels representative Diego Teurelinx on expected action by the European Commission in the coming year was complimented by a review of ECASBA's actions on the main issues from General Manager Jonathan Williams FICS. These presentations were very well-received, particularly by the delegates from outside the European Union, and will be a regular feature of future meetings.

Both speakers covered ECASBA's contributions to the European Commission's major public consultations on logistics, maritime and port policy in some detail. Of particular interest were the proposals on the Common European Maritime Space, which aims to reduce the administrative burden on intra-European short sea cargo movements, the MarNIS project for enhanced communication between the ship and shore and Commission's opposition to the proposed US 100% container scanning proposals. Clearly all these initiatives will have a major impact on the role of the ship agent if they come to fruition and so ECASBA is continuing to closely monitor developments.

The meeting concluded with a short presentation on the state of the container trade between Europe and South America in response to a specific request from the Argentine and Brazilian delegations.

The Chartering & Documentary Committee Plenary meeting opened with reports from the various market sectors—containers, dry bulk and tankers.

The meeting then discussed the issue of brokers paying commissions to third parties, which at the time of the meeting had come to light in a number of high profile cases involving major broking firms. It was agreed that the very high levels of freight rates at the time had exacerbated the situation and brokers were urged to take extra steps to ensure that any request or claim for a commission was valid before it was paid.

Other topics for discussion included the release of bills of lading against telexed or electronic advice and the on-going attempts to develop a fully electronic system for the exchange of documentation.

Two major new charterparty forms, the ASBACHEMVOY and the BIMCO Standard Newbuilding Contract, were the subject of presentations by C&D Committee Vice Chairman Marygrace Collins and BIMCO Documentary Committee Chairman John Tsatsas respectively.

Mrs. Collins explained that the impetus for the development of a separate form for chemical shipments had come from the trade itself – as for many years it had been amending ASBA's very successful AS-BATANKVOY form designed for the tanker sector. She said the new form was in the final stages of development and input from FONASBA members – as well as chemical operators – would be welcomed.

Both Gunnar Knudsen of INTERTANKO and John Tsatsas of BIMCO reported on the activities of their respective organisations' documentary committees and in the case of BIMCO this was followed by a detailed resume of the Standard Newbuilding Contract, NEWBUILDCON.

The Liner & Port Agency Plenary meeting opened with reports on the activities of the FONASBA regional committees covering South America (CIANAM), the Far East, the Mediterranean & Black Sea (MABSA) and the Nordic countries and a number of issues were brought forward for discussion. During the CIANAM report the Chairman announced that as a result of their participation in the Annual Meeting as ob-

FONASBA ANNUAL MEETING 2007 contd./...

servers, APAM of Peru had signalled their intention to apply for FONASBA membership at the Council Meeting.

Following reports from the Liner and Port & Tanker Agency Working Groups, the meeting discussed the proposed Quality Standard conditions and the revised Standard Port Agency Conditions document. The meeting fully supported the Quality Standard initiative but some minor concerns were expressed with regard to the wording of certain sections of the document. Following a discussion within the meeting a revised text was approved for presentation to the Council Meeting.

As requested at the Marrakech Annual Meeting in 2006, revision of certain sections of the FONASBA Standard Port Agency conditions document had been undertaken – primarily relating to the ability of the agent to vary the proforma disbursements where required and to recognise the role of agent as the primary conduit for exchange of information between the ship and shore – and the changes were endorsed by the meeting.

FONASBA's activities in relation to INTERTANKO's Poseidon Challenge, and its contribution to IMO's work on enhancing shore-based reception facilities for ship-generated waste, were also discussed, as was the need for agents to be able to secure adequate compensation for the work carried out on behalf of principals.

The work programme concluded with the Council Meeting, during which the FONASBA Quality Standard and the revised Standard Port Agency Conditions documents were approved and the membership application from Peru was unanimously supported. Council also unanimously endorsed the application from SAASOA of South Africa to hold the 2009 Annual Meeting in Cape Town.

As is traditional, the work programme was supplemented by excellent partners and social programmes, the highlights of which were a flamboyant tango show at a restored theatre in Buenos Aires and a visit to a traditional gaucho ranch south of the city.

FONASBA's 2008 Annual Meeting will take place during the week beginning October 13th in Opatija, Croatia, as guests of the Association of Maritime Agents of Croatia.



EXTERNAL RELATIONS: COOPERATION WITH OTHER INDUSTRY BODIES

FONASBA continues to develop and maintain close relations with external organisations where these are in the best interests of both the membership and for the good of the maritime industry as a whole. These relationships are greatly valued by FONASBA and play a central role in our activities.

Our consultative status with IMO was endorsed by Assembly 25 in November last year and we are now playing an active part in the work of the Organisation. In February this year, the President, Mario Froio, accompanied by Immediate Past President Philip Wood FICS and General Manager Jonathan C. Williams FICS, met with IMO Secretary General Eleftherios Mitropoulos and senior staff members to discuss the contributions FONASBA could make to the IMO work plan. It was suggested that the greatest value would be derived by both sides if FONASBA concentrated its efforts in supporting the various technical committees and correspondence groups where its knowledge, experience and input would be put to best advantage. Following participation last year in the industry Port Reception Facilities (PRF) forum, FONASBA has now been accepted as a member of the correspondence group on PRF which will report to the Flag State Implementation (FSI) Committee in June next year. This is but a start and FONASBA will actively participate in other such groups as and where our input will be relevant and valued.

INTERTANKO's Poseidon Challenge is ongoing and FONASBA will be updating its Port Reception Facilities Survey for tankers in time for INTERTANKO's 2009 Tanker Event. FONASBA was also invited by INTERTANKO to make a presentation on the Quality Standard at the Istanbul event in April this year. The opportunity to promote the Standard in front of the world's top independent tanker owners was very much appreciated, as indeed was INTERTANKO's enthusiastic support for the Standard project from the very beginning.

Intercargo, the international association of dry cargo shipowners, has fully supported the Quality Standard project since the beginning and again we were very grateful for their ongoing and enthusiastic support.

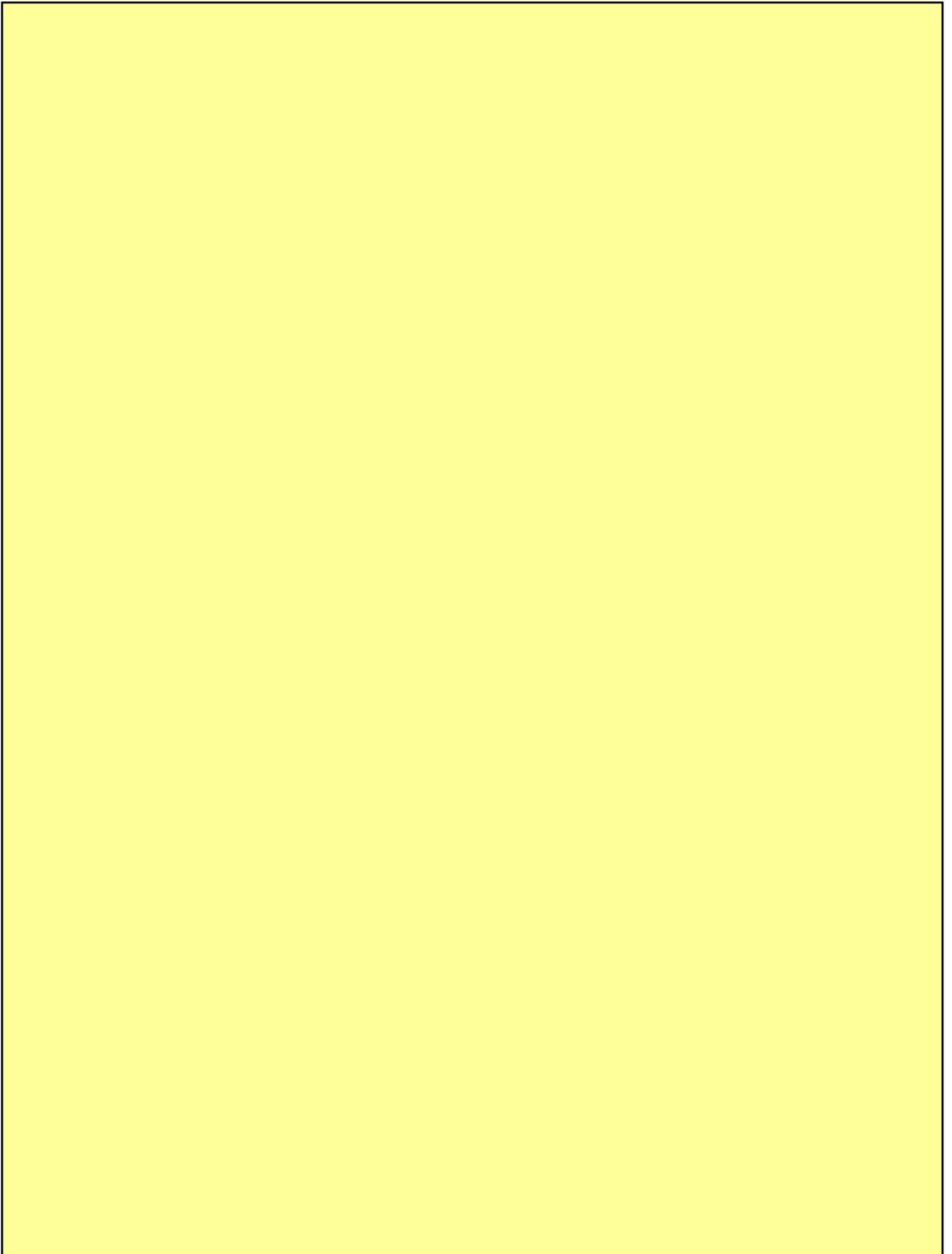
ITIC, the intermediary insurer, and like INTERTANKO, a Club member of FONASBA, has also been very supportive and in October FONASBA will be presenting the Quality Standard at ITIC's Forum, where we hope to generate additional support from the ITIC membership. In addition, Andrew Jamieson, ITIC's Claims Director, will be present at the Annual Meeting in Croatia, where his input, particularly to the C&D Committee meeting, will be very welcome.

Relations with BIMCO, another Club member, also remain very active and the organisation will also be represented at the 2008 Annual Meeting. FONASBA General Manager Jonathan Williams was honoured to represent FONASBA at a dinner hosted by BIMCO President Philip Embiricos in London in May following a meeting of its Documentary Committee.

In Europe, and as highlighted in the European Report on pages 15 and 16, ECASBA continues to maintain very close contact with the European Commission and has commented on all the relevant consultations and initiatives undertaken by DG-TREN and DG-TAXUD in the past twelve months.

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: 57

Contact: *Mr. Javier Enrique Dulce*

Florida 537, 20th Floor, (C1005 AAK) BUENOS AIRES, Argentina

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Centro de Navegación

Population:	40,677,348
GDP 2006/7:	US\$ 523.7 Billion
Total Volume of Exports (2006/7):	US\$ 54.6 Billion
Total Volume of Imports (2006/7):	US\$ 42.59 Billion
Principal Commodities Imported:	Machinery, motor vehicles, petroleum and natural gas, chemicals and plastics
Principal Commodities Exported:	Soya beans and derivatives, petroleum and gas, vehicles, corn, wheat

Foreign Trade

Our country is one of the largest exporters of grains, vegoils and by products with a volume of approximately 100 million tons. 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 1,4 million TEU this year. It is important the reefer cargo trade. Due to a farmers lock out the grow of the agriculture sector has decreased.

Port Situation

With almost 4725 Km. of Atlantic coastline, it is clear that Argentina has a variety of ports. The Paraña-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. This year we expect an increase of 20 % on the Cruise Vessels. from last year. It is expected a new Container Terminal in La Plata Port for next year to be fully operational in 3 years. In Buenos Aires Port Terminal there is a big concern regarding the expiration of the concession contracts. Unless an extension they are going to cease in 2012, 2018 and 2019. For this reason some important investments in infrastructure are not being carried out.

Activities in CIANAM -

Centro de Navegación maintains strong participation in the regional chamber CIANAM and has been named as permanent secretariat of the Association, while the President will be varying among all countries.

This year the annual meeting of CIANAM was held in Sao Paulo, Brazil.-

Our education institute “CENTRO DE ESTUDIOS DEL COMERCIO MARÍTIMO INTERNACIONAL” has made an agreement with an official University and students can continue for approx. 1 year and get an University Degree.

At the end of 2008 it will be issued a new edition of the River Plate Shipping Guide, a very traditional publication on Ports and Maritime Issued for almost 80 years. The book contains an overview of all Ports in our Region with a brief summary of Port, Customs, Navigation, Health and any other regulation concerning maritime trade.

Member Association Report — AUSTRALIA

Association: *Shipping Australia Ltd.*

Membership: 41

Contact: *Mr. Llew Russell*

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website: www.shippingaustralia.com



Population:	21,017,000
GDP 2006/7:	US\$ 908.8 Billion
Total Volume of Exports (2006/7):	US\$ 141.7 Billion
Total Volume of Imports (2006/7):	US\$ 159.4 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 continues to experience strong membership support despite increasing consolidation in the industry. Inchcape Shipping Services has acquired Oceania Maritime Services and Flinders Shipping Agency, Patrick Shipping has been purchased by Searoad and US Lines (Australia) purchased by ANL Container Line. Goodman Fielder, a large charterer of vessels in Australia has joined SAL, as has a new towage company PB Towage and Royal Caribbean Cruise Lines.

Many of the issues mentioned last year continued in 2007/08. The electronic visa system required for all foreign crew visiting Australia became mandatory from 1 January this year. As at the end of May, 320,000 visas have been issued. Australia is only the second country in the world to introduce a full visa system for foreign crew. SAL hopes that other countries will consider adopting the ILO 185 Convention on Seafarer ID which would at least provide an international standard.

There has been progress in the development of national draft legislation to apply the Ballast Water Convention when it comes into force and also to provide a national system for the treatment of domestic ballast water. Details relating to cost recovery and who will carry out inspections has been the subject of ongoing debate. Later this year, Australia will introduce legislation on a new bio-hull fouling regime that could see vessels being required to leave Australia if they are found to have exotic pests. SAL has circulated best practice guidelines. The emphasis is on risk assessing non-trading vessels and SAL has been pushing hard for ports to allow in-water cleaning, particularly for smaller identified infestations.

SAL has been working closely with Customs regarding the development of a possible Authorised Economic Operator Programme which relies on bi-lateral mutual cooperation agreements. Successful trials have been conducted between Australia and New Zealand. We anticipate ongoing activity regarding the security of the anti-terrorist capability of our container supply chains. We have been working with the Border Protection Command regarding tracking vessels within 1,000 nautical miles around Australia.

SAL has continued to liaise with the Australian Quarantine Inspection Service in both bi-lateral meetings and through the Australian and Industry Cargo Consultative Committee. We are discussing with Quarantine new arrangements for delivering ship stores to cruise vessels. We are seeking to trial an electronic quarantine pre-arrival report and a proposed electronic clearance of vessels by Customs.

Many submissions have been written including a review of port competition and regulation, a review of quarantine and biosecurity in Australia, a submission on the review of coastal shipping policy as well as an independent review of the interface between land transport and stevedores at Port Botany.

SAL has continued to pursue the issue of overweight containers and is very interested in developments in IMO on hopefully a voluntary regime covering the weighing of containers. The proposed amendments to Part X of the Australian Trade Practices Act which provides exemption from our antitrust laws for conferences has been postponed until next year given the new federal Government's priorities for legislation.

Member Association Report — BELGIUM

Association: NAVES vzw

Membership: 141

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

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e-mail: info@asv.be

website:



Population:	10,403,951
GDP 2006/7:	US\$ 376 Billion
Total Volume of Exports (2006/7):	US\$ 322.1 billion
Total Volume of Imports (2006/7):	US\$ 322.9 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, Zeebrugge, Ghent, Ostend-Newport and Brussels represent in total 141 ship agencies, which means about 90% of the market. Quite a number of them are liner-owned offices founded by the container operators, of whom nearly all are now represented in Belgium by their own agencies. Non-members mainly have to be situated in specific niches. All secretariat services are performed by the Antwerp Shipping Federation (ASF-ASV) with a permanent staff of six.

In the year 2007 Belgian ports handled **258 million tons** of cargo, an increase of 20 million tons. . The port of Antwerp alone took care of about 183 million tons, which still makes it the 4th biggest port in the world and the second in Europe. Containers figures made a big jump of 17,8% and are now exceeding the 10 million with their 10.261.453 TEU. One of the reasons behind this important increase was the free container terminal capacity. Contrary to neighbouring countries, again not a single Belgian port was congested in 2008 and as the already developed handling capacity goes up to 15 million TEU, it will stay like this for coming years.

As the Netherlands finally ratified the recent River Scheldt Treaties, further deepening and widening of the nautical access will lead to extended tidal-free sailings and more comfortable tidal-windows for ULCC's and deep drafting bulkers. This year Zeebrugge enjoyed regular calls of the "Emma" class container vessels of Maersk (estimated max capacity over 13.500 TEU) and ULCC's are now calling Antwerp on a regular basis. Revised procedures on the Ghent-Terneuzen canal allow deeper loaded vessels to sail up to the port of Ghent.

During 2007 dry bulk as well as liquid slightly went down, but figures of 2008 are luckily showing a leap upwards again. RORO increased with a healthy 7,1 % and is still growing in 2008. Conventional cargo and breakbulk went up with 7,5 % and even increased further dramatically in 2008. Last year we saw over 34.000 vessels calling our ports, with an average GT of over 16.000.

All those increasing volumes, combined with new regulations and electronic systems made our agency community work very hard over last year. Again Customs needed a lot of attention, as beginning 2008, the long awaited Paperless Customs system took off. NAVES and her members were in constant contact with authorities in order to get things working to the benefit of our industry. The so-called Security Amendment introduced the AEO - Authorised Economic Operator - concept, and the Modernised Customs Code is now standing on the doorstep.

As from October 18th 2008, we have to face the post-conference era. As we have a lot of liner-owned agencies amongst our members, and many independent offices who are representing several liner carriers, this new era brings a lot of questions and worries.

In order to give a more substantial support in all of those new laws and regulations, the secretariat of the Antwerp Shipping Federation was enlarged with a legal officer.

As in many neighbouring countries we had to face more and more problems in order to find sufficient young and skilled staff. Unemployment in the Flemish area is below 5%, so all the sectors of the industry are doing big efforts and spending a lot of money in order to attract the best youngsters. The Antwerp Shipping Federation decided to launch a big promotion action to make the ship agent world better known through a dedicated website, publicity on TV and in movie theatres, printed press, job-fairs, school-and big social events etc. Please take a look at www.ikwordscheepsagent.be ("I would like to be a ship agent") and enjoy the visual spot at the opening of the site! As this action has to create a long staying promo buzz, ASF will continue the investment for at least three years. We are sure all NAVES members will benefit from it!

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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website: www.fenamar.com.br



Fundada em 7 de Setembro de 1989

Population:	192,000.000
GDP 2006/7:	US\$ 1,314 Billion
Total Volume of Exports (2006/7):	US\$ 160.6 Billion
Total Volume of Imports (2006/7):	US\$ 120.6 Billion
Principal Commodities Imported:	Machinery, electrical and transport equipment, chemicals, oil, automotive parts, electronics
Principal Commodities Exported:	Coffee, orange juice, steel, iron ore, sugar, soya beans and by-products and meat

FENAMAR has worked very hard during the last twelve months on many projects, the most important ones being:

FENAMAR Projects

→ The Project implemented in 2005 to offer the transmission service of EDI files for the Affiliated members named VAN-FENAMAR, continues working very well and during the last twelve months, generated a direct saving to such members of US\$ 204,000.00, related to the transmission of 652.291 files.

→ SISCOMEX CARGA – This is a new integrated system which was developed by Customs Authorities and Marine Merchant Authorities in Brazil and was launched on April 2008. During the year of 2007, 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 a Committee involving all the private sector (Shippers, Importers, Marine Terminals, Port Operators, etc) in order to analyze the system and suggest improvements, where possible.

After April 2008 FENAMAR became a focal point to assist all Its Members facing difficulties with the new system. Also FENAMAR implemented on Its website a discussion Forum for users to post questions and doubts, for analysis and answers by experts. This Forum already counts with almost 100 assigned users and received more than 1,500 accesses throughout Brazil.

→ FENAMAR was invited on October 2007 by The Brazilian Navy to develop a special software, meant to process all the information required by the Navy offices at all Brazilian Ports to manage vessels Calls.

→ FENAMAR officially launched its Quality Label in November 2007, to certify the services provided by the affiliated Shipagents.

Conferences and Seminars:

Fenamar represented the private sector related to Maritime Transportation during the event promoted on April 2007 in Panamá by OAE/CIP (Organization of American Estates / International Chamber of Ports).

In April FENAMAR was the host and sponsor of The V Annual Meeting of CIANAM, held in São Paulo, where important issues related the Shipping Industry in Latin America were discussed.

With regards to Brazilian Federal 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.

Member Association Report — BULGARIA

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

Membership: 52

Contact: *Mr. I. Demirov*

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website: www.basba@mt-link.bg



Population:	7,262,675
GDP 2006/7:	US\$ 39.61 Billion
Total Volume of Exports (2006/7):	US\$ 18.44 Billion
Total Volume of Imports (2006/7):	US\$ 28.67 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 members handle approximately 70 % of ships calling at the ports of Varna region, about 90 % of ships calling at Danube Ports of Bulgaria, and a considerable part of the market of agent services in the Port of Bourgas. In the past year total cargo passing through the Black Sea ports amounted to 25.49 million tonnes, (8.1 % less compared to the previous year), and through Danube river ports 6.7 million tonnes (up 11.6%) whilst total container traffic through the seaports stood at 127,000 TEU (up 5.8%).

BASBA is still working to attain the statute of a branch organisation, in order to influence directly the diverse work of the administrations. The issue of voting the law concerning branch organisations by the National Assembly is the main goal for this year for the Branch organisation council at the Bulgarian Chamber of Commerce and Industry.

This year we have a progress in the dialogue and the work with the authorities. All participant administrations in inward/outward clearance of ships are aware of the need for better practice and will participate in the workgroup of specialists formed by BASBA. Thereby, the work group will propose a new clearance practice to the government in an attempt to change the relevant legislation. This is the reason why BASBA approached ECASBA with an inquiry about those practices in EU member states.

BASBA organized one seminar concerning the work of the shipbrokers in Bulgaria and using electronic web platforms for exchange of information. We prepared an agreement for mutual work and help with the Naval Academy in Varna, where is situated the distance learning center of Institute of Chartered Shipbrokers London for Bulgaria. BASBA is one of the co-founders of the Marine Cluster Bulgaria, which has won a project for development of clusters. The latter includes creating a logistics-training center.

BASBA is a member of the Bulgarian Chamber of Shipping and works together on the issue of the seamen's taxes that raised concerns among the entire maritime community.

Unfortunately, the lack of veterinary checkpoint in the container port of Varna-East will not be resolved at all. The EU administration informed The Ministry of Agriculture and Food Supply of the difficulties in establishing a checkpoint in one of the existing buildings, which was the original idea. The most cost effective option would be to build a brand new building instead of using the existing facilities. The latter will cost too much; the new terminal with all the necessary checkpoints will be functioning around 2012-2013 when it will be useless.

The above problem was created due to clear omission of the veterinary authorities some years ago and the result is that the lines calling Varna-East have been put for years due to the said reason in unequal market position towards the lines calling Varna –West.

The Liner section had several meetings with the management of Port of Varna and the Varna Customs. That resulted in a few improvements in the co-operation among all parties. A meeting was held with the Port of Bourgas and the Bourgas Customs on similar issues but there hasn't been much progress so far.

The construction of the new Container terminals in Bourgas and Varna will begin in the early 2009; the Minister of Economy signed the loan papers with the Japan Bank of International Co-operation.

Anyhow the new terminals are expected to be operational in at least five years as from now and during that time the increasing volumes of container traffic year by year will be extending the problems as well unless the authorities take urgent and serious steps for improving the situation as much as possible. Unfortunately at this stage we can not notice any adequate reactions.

The privatisation of the Navigation Maritime Bulgare is completed and the new owner is planning of selling the old ships and buying new ones in the next few years.

The reputation of BASBA is growing internationally. The active participation in the discussions about important issues with FONASBA and ECASBA members is but one feature. That is a way of 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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e-mail: secretary@asbac.hr

website: www.asbac.hr



Population:	4,491,543
GDP 2006/7:	US\$ 51.36 Billion
Total Volume of Exports (2006/7):	US\$ 12.02 Billion
Total Volume of Imports (2006/7):	US\$ 26.54 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 170,000 TEU per year. 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.

Finally, the Association of Maritime Agents of Croatia is honoured to be the host association for the 2008 FONASBA Annual Meeting, which will be held in Opatija in October 2008.

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 2006/7	US\$ 21.0 Billion
Total Volume of Exports 2006/7:	US\$ 2.0 Billion
Total Volume of Imports 2006/7:	US\$ 7.8 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) remains actively interested and involved, as the private sector's representative, in all matters concerning the Cyprus Port Industry.

1.Cyprus Short Sea Promotion Centre (CSPC)

Our Association continues to be directly involved in the activities of the Cyprus Short Sea Promotion Centre. The website address of the CSPC is: www.shortsea.org.cy The CSPC presently considers a proposal for a single multimodal transport document within the EU which was submitted by the French SPC.

2.Electronic Customs Regulations of the EU and the Authorized Economic Operator (AEO) based on the Community Customs Code.

In view of the complicated issues involved, the Cyprus Customs will organise additional seminars on the Electronic Customs Regulations for the local stakeholders and especially for those directly involved in shipping and forwarding activities. The seminars by the Cyprus Customs on the Authorized Economic Operator (AEO) have been completed. The CSA has hired the services of consultants to advise its members on the correct application procedures towards AEO authorisation.

3.Security Charge at Cyprus Ports

There are no developments yet on this issue. The private sector including the CSA is strongly opposed to this charge which the CPA has brought before the Ministry of Finance for further consideration.

4.Port Labour Council – renewal of port labour force

After long and hard negotiations between the CSA and the Unions of the stevedores, under the auspices of the Port Labour Council, an agreement was reached for the renewal of the ports' labour force. The new scheme and its financial arrangements are fully backed by the government. Its implementation, in September 2008, means the peaceful transformation of the Limassol and Larnaca port labour force to a young well trained labour force working under significantly improved and efficient conditions, compliant to EU regulations.

5. Upgrading and expansion of Limassol Port

The dredging of the Limassol container terminal to 16.0m and its access channel and turning circle to 17.0m shall be completed by October. The extension of the container stacking area has been completed. The long awaited transfer of the two Panamax gantries from Larnaca port to Limassol is expected by December. Before the end of 2008, the CPA is expected to launch the international tenders for the 500m container quay extension; for a new 60 bollard tugboat; for two post-Panamax gantries and the construction of the new passenger terminal.

6.Shortlanded goods at Cyprus Ports

The dispute between our Association and the Cyprus Customs concerning the financial responsibility of the ship's agent for short-landed goods was brought before ECASBA for assistance. The local customs authorities insist to consider the ship's agent liable for the payment of the relevant duties and taxes in such cases. The CSA has also applied informally to TAXUD requesting their assistance and advice. The TAXUD response is expected with great interest.

7.Educational matters.

Our Association remains committed to the education of the employees of its members in shipping agency and maritime related matters. To this end the CSA fully supports and encourages its members to enrol every new employee to the course 'Understanding Shipping' which is run successfully by the Cyprus Branch of ICS for over ten years.

Member Association Report — DENMARK

Association: *The Danish Shipbrokers Association*

Membership: 155

Contact: *Mr. A. Houtved FICS*

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Population:	5,500,000
GDP 2006/7:	US\$ 203.7 Billion
Total Volume of Exports (2006/7):	US\$ 101.2 Billion
Total Volume of Imports (2006/7):	US\$ 102.3 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

FULL SPEED AHEAD is a proper description of Danish Shipping. Danish shipping companies operate totally more than 55 million DWT and had as per 1 May 2008 ordered 332 newbuildings totalling 14 million DWT and a value of US\$ 13.2 billion. 7 % of the world tonnage is operated from Denmark and Danish shipping companies arrange transportation of 10 % of the world transportation.

Ports and Infrastructure

The Danish infrastructure is getting more and more congested and it is high on the political agenda to have cargo moved "From Road To Sea". However, most ports are owned and controlled by the local municipality and there seems to be an interest in transforming port-areas to recreational purposes or offices or accommodation. This will have a damaging influence on the efforts done to transfer cargo from road to sea.

Environmental issues

The environment, CO₂, NO_x etc. are important issues and Denmark is heavily involved in various projects aiming at reducing the impact from transportation on the environment. Denmark is very active in IMO and during the spring-meeting in Oslo Denmark suggests nine fundamental principles to apply for future IMO regulation of CO₂ emissions from ships. The two central principles were that:

- future IMO regulation should apply equally for all ships without exception, and
- shipping should efficiently contribute to limiting the total CO₂ emission on the global scale.

In 2009 Denmark will host the International Conference on Climate.

Education

Education is still high on the agenda and Danish Shipbrokers' Association is very active both in the actual education activities as well as in activities aimed at increasing the numbers of employees in the business. The Danish shipping education has been validated by The Institute of Chartered Shipbrokers and starting the fall 2008 the Danish Shipping-education will be available in English. It is expected that this will attract foreign student to "The Best Shipping-Education in The World. 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.

Members' meetings

During the year various meetings are 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..

Member Association Report — DUBAI

Association: *The Dubai Shipping Agents Association*

Membership: 52

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website: www.dubaisaa.ae



Population (United Arab Emirates):	4,621,000
GDP 2006/7 (UAE):	US\$ 192.6 Billion
Total Volume of Exports (2006/7) (UAE):	US\$ 156.6 Billion
Total Volume of Imports (2006/7) (UAE):	US\$ 101.6 Billion
Principal Commodities Imported (UAE):	Machinery and transport equipment, chemicals, food
Principal Commodities Exported (UAE):	Crude oil, natural gas, dried fish, dates

The 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 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 association. It can convey to its members the international agreements endorsed by the UAE and the Maritime Conventions and the local rules and regulation in respect of shipping industry and customary practices pertaining to shipping. The agent's relation with Customs and Port Authority are correlative as such through negotiations and discussion with the customs and port authorities, DSAA can achieve its goal. DSAA will recommend to its members the desirability of accepting self regulatory control by agreeing to adhere to its code of conduct. Members of DSAA 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. DSAA conducts interactive workshop and seminars including:-

- MEET & GREET SERIES - A quarterly event where members meet with the senior officials from Dubai Ports and Customs, to discuss the day-to-day problems they face and they get instant replies / suggestions. This has been a very popular event.
- CONTAINERS ON HOLD – DSAA organised a meeting with Dubai Customs for those members whose containers were put on hold for along period of time.
- BIMCO SEMINAR ON TOUGH TANKER – DSAA supported this event.
- CUSTOMER WORKSHOP ON UCP 600 – DSAA coordinated participation of its members in this programme 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.
- A meeting with the Banker's Association to discuss various issues relating to Letters of Credit / Bank Guarantees / Shipping Guarantees etc
- SOUTHERN ASIA, PORTS, LOGISTICS AND SHIPPING SEMINAR – DSAA has supported this event for the last 3 years.
- MARINE BIZ T.V. – Marine Biz TV is the world's FIRST Global Maritime TV channel – for which DSAA organized a launching seminar to introduce them to the shipping industry in Dubai.
- 2ND ANNUAL GLOBAL SUPPLY CHAIN SUMMIT – DSAA will be one of the supporters of this event to be held during Nov. 2008.

Member Association Report — FINLAND

Association: *The Finnish Shipbrokers Association*

Membership: 71

Contact: *Mr. S. Lomberg*

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e-mail: secr@shipbrokers.fi

website: www.shipbrokers.fi



Population:	5, 244,749
GDP 2006/7:	US\$ 245 Billion
Total Volume of Imports (2006/7):	US\$ 81.54 Billion
Total Volume of Exports (2006/7):	US\$ 104.9 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

In general the recent years' positive development of the commercial environment is slowing down somewhat. Economists foresee though that the expected slack will be less than the average in the EU countries. The ceiling in the economical environment and production appears to have been reached for this time and consequently this is also reflected in the Finnish foreign trade. Inflation has reached the highest figures during this decade. Positive is that the unemployment figures remain at a low level.

Last year the Government agreed upon measures to promote Finnish shipping. The overall "package" for increasing the competitiveness includes law initiatives for revision of the tonnage tax, fairway dues and merchant marine vessel register. An initiative to decrease of the fairway dues (tax) by just below 2 percent from January 1st 2009 will be presented to parliament in October.

The Finnish Shipbrokers' Association held its 88th annual meeting in Kotka, March 13th 2008. Mr. Eero Holma was elected new Chairman, succeeding the resigning chairman Mr. Rolf Sandberg. At the meeting Mr Rolf Sandberg was awarded Honorary Membership of the Association.

Also during this year the issue of fairway dues is high on our agenda. As a result of our claim regarding the fairway dues legislation the European commission sent Finland a "reasoned opinion" in March. Consequently the Law on Fairway dues will be altered to correspond with EU legislation. Regrettably this will not necessarily lead to a "release" of payment responsibility for the Ship's Agent. Court decisions have now been reached in cases where additional, increased fairway dues had been levied retroactively by Customs. The court reached the conclusion that the division into "domestic" and "foreign" fairway dues (which was the law until end 2005) was discriminating and that Customs should revise their claims for additional payments. As a consequence Customs have now withdrawn their claims. As a result of the court decision it is further anticipated that Shipowners will apply for restitution of fairway dues paid. Amount mentioned which might be reclaimed could be close to 100 million euros. Customs though emphasize their decisions are time barred within three years, thus amount reclaimable will in their view be considerably lower.

The Association continues to actively promote having the English language accepted by authorities as basis for granting pilot license. The working group set by the Ministry of Transport continued its work and ordered a risk analysis of consequences if English was used as piloting language. The outcome was in favour of implementing English as piloting language.

The Finnish branch of the International Chamber of Commerce initiated a revision of revision/update of the domestic "Standard Shipping Conditions". The Association played an active role in the process and the new conditions have just been released.

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 which is planned to become effective in Finland as of 1st July, 2009.

The development of the new, so called PortNet2 is managed by the Finnish Maritime Administration and our views will be heard during the process. We are exploring alternatives to offer our members group liability insurance cover.

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: *AMCF*

Membership: *142*

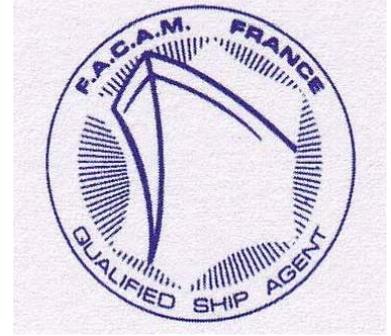
Contact: *Mr. A. Lobadowski*

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website:



Population:	63,713,926
GDP 2006/7:	US\$ 2.743 Trillion
Total Volume of Exports (2006/7):	US\$ 582 Billion
Total Volume of Imports (2006/7):	US\$ 638 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

Once again 2007 turned to be a satisfactory year for the shipping industry but once again the situation of our ports did not allow our members to fully take advantage of the generally good tendency of the trades.

If brokers could make profit of the high levels of freight rates, agency remuneration remained low, especially taking into consideration the always growing responsibilities and increasing paperwork put on that profession.

But the main concern was about the French principal ports situation. As said last year, the election of President Nicolas Sarkozy brought some hopes in this field as he announced in the early summer 2007 that a new reform would be undertaken in order to improve the performances and competitiveness of our main ports and bring them at the standard of the European majors. It was however only in early 2008 that the French Government announced a revival plan, opening a wide consultation with all trade unions and professional bodies. Our association followed of course very closely this matter.

The law finally voted in the early summer 2008 is structured on four main orientations :

- Re-focusing the missions of big maritime ports on state activities
- Rationalising the organisation of port handling operations on the model of the main European ports with integrated operators
- Modernising the governance of the big maritime ports
- Setting up coordination between ports of a same range

And to help the French government announced a doubling of the contribution to port investments between 2009 and 2013.

However, this law is only a frame and the implementation procedures about the organisation of port handling operations have to be specified in an agreement that social partners are invited to conclude before November 1st 2008. Unfortunately all this process was and is still accompanied by a number of strikes heavily penalizing the traffics and the professionals involved.

Apart from those considerations, some of the main topics raised up the last few years are still on the table, like competition on towage in the port of Le Havre which still rises from time to time some trouble and has still not proved its long-dated economical viability.

As far as costs are concerned, no important changes occurred in main tariffs. Hopes are now put in a better consideration of clients positions and we will wait for what the port revival plan will bring in this field.

Our association has of course also been involved in the follow up of other routine subjects, with a special mention for the so called authorised economic operators. Few companies have for the time being applied but things may change in the forthcoming months.

Member Association Report — GERMANY

Association: *Zentralverband Deutscher Schiffsmakler*

Membership: 400

Contact: *Mr. K. Bültjer*

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website: www.zvds.de



Population:	82,400,996
GDP 2006/7:	US\$ 2.63 Trillion
Total Volume of Exports (2006/7):	US\$ 1.133 Trillion
Total Volume of Imports (2006/7):	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.

For a number of years now, the world economy has been in a steady upswing phase, which has also benefited the German economy. Germany is the world's leading exporter, and set up a new record in 2007, keeping the number one position. Despite the strength of the euro, German companies exported as much in the first 11 months of the year as in the whole of the previous year. Growth in the volume of goods carried by German maritime shipping has been strong for a number of years, and had hit a new high of 300 million tonnes in 2006; it was up by another 4% in 2007, to 311 million tonnes. Container traffic played a major part in that growth, with an increase of about 12%.

There were fears that the time charter market, which is so important to ship brokers because of the large tonnage increases, would not develop as positively as in the previous year; in the second half of 2008 these fears turned out to be justified. Charter rates were in decline in most ship types, as shown in the HAMBURG INDEX of Container Ship Time Charter Rates, which is published monthly by the Hamburg Shipbrokers' Association.

There were considerable variations in the way freight rates developed in line shipping. The overall level in 2007 was substantially below that of the previous year, and that applies especially to US routes. But on Asian/Australian routes, freight rates initially increased, then dropped sharply again in the course of 2008, in some cases by more than 50%. Transport volumes showed double-digit growth in both these areas. However, as goods movements from Asia and to North America are growing faster than in the opposite direction, there were repeatedly imbalances, making it necessary to carry larger numbers of empty containers.

The members of the German Ship Brokers' Association were informed of the latest developments in shipping by means of circulars, information meetings and seminars. Individual problems and subjects directly related to the activities of ship brokers were discussed in special working groups and by the Board. The subjects covered included, for example:

- Pilotage issues (remuneration structure, recruiting of young people, change in pilotage language)
- Collective bargaining with the Trade Union
- Value Added Tax law in maritime shipping
- Training and education of young people in the shipping industry
- Increasing the attractiveness of ports
- Liability of ship brokers

A social highlight was the Eisbeisessen dinner event hosted by the Hamburg Shipbrokers' Association. It was attended by more than 5000 people from over 50 countries. The Eisbeisessen is a meeting point for shipping experts, for exchange of ideas and for making new contacts and cultivating existing links.

Member Association Report — GREAT BRITAIN

Association: *The Institute of Chartered Shipbrokers*

Membership: 114

Contact: *Mr. G.R. Nimmo FICS*

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Population:	60,943,912
GDP 2006/7:	US\$ 2.137 Trillion
Total Volume of Exports (2006/7):	US\$ 441.4 Billion
Total Volume of Imports (2006/7):	US\$ 616.8 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 3,500 Individual and over 100 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, continues to be directly concerned with a number of consultations and initiatives involving Her Majesty's Revenue and Customs (HMRC), the newly formed UK Border Agency (UKBA), Maritime Coastguard Agency (MCA), the Home Office, Department for Transport (DfT) and SITPRO amongst others. Consultations during the past year have included SAD Harmonisation changes, the Secure Freight Initiative, UK Border Management and Controls, HMRC's National Clearance Hub UK National Audit Office studies, UK and EU Port and Maritime Policy legislation and, more recently, the 'One Voice' initiative where we have joined up with the Baltic Exchange, British Ports Association, the Chamber of Shipping and the UK Major Ports Group to work together and speak with a single voice on key strategic and practical issues of joint concern.

The Institute's Federation Council maintains close links with FONASBA and ECASBA and continues to play an active part in the numerous developments and consultations which have occurred over the past year.

It is pleasing to report that after applying to FONASBA's Executive Committee, the Institute of Chartered Shipbrokers met with the membership criteria and were approved with the Quality Standard.

Several Company Members of the Institute have applied and been approved to use the FONASBA Quality Standard mark, which includes most of the UK's major shipping lines/agents covering all of the UK's main ports.

The Institute of Chartered Shipbrokers continues to develop and expand its Education and Training programme and its TutorShip division continues to grow with a record number of students worldwide taking the Institute's examinations during this last year. Various levels of study and examination covering all of the main disciplines of shipping, shipping law, economics and finance are available and currently a new Offshore syllabus is being developed to cater for this market sector.

The Institute's highly successful one day training courses, the 'Business of Shipping', and 'Liner Business' are offered to companies and can be presented in individual company premises throughout the United Kingdom as well as overseas.

Any FONASBA/ECASBA Association interesting in holding these courses should contact education@ics.org.uk for further information.

Member Association Report — HUNGARY

Association: *The Hungarian Shipbroking & Shipping Agents Association*

Membership: 11

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website:



Population:	10,035,000
GDP 2006/7:	US\$ 138.4 Billion
Total Volume of Exports (2006/7):	US\$ 88.77 Billion
Total Volume of Imports (2006/7):	US\$ 87.88 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

Republic of Hungary has joined NATO in 1999 and the EU in 2004. Hungary has made the transition from a centrally planned to a market economy, with a per capita income nearly two-thirds that of the EU-25 average. The private sector account for more than 80% of GDP.

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-Gönyű, Budapest, Csepel, Dunaujváros, Baja and Mohács. 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.

The “Hungarian Shipbrokers and Shipping Agents Association” in addition to its membership of FONASBA and ECASBA, continues to be a full member of the MVVLSZ (Hungarian Rail-, Water- and Airtransport Association) and an associate member of MSZSZ (Association of Hungarian Forwarding and Logistic Service Providers). The number of the members of the Association unchanged in 2007/2008: 11 in total (7 companies and 4 private persons only). 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. In 2007/2008 the management of our Association did their utmost 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, but in vain.

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 at all during 2007/2008 on the “NAIADES” project of the European Commission which was supposed to assist the development of the European waterways, including the Danube.

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 foreign and local forums and seminars of the industry. Our Vice President, Mr. Botond Szalma has been awarded with the title “Manager of Logistics of the Year” in 2007.

Member Association Report — IRELAND

Association: *The Irish Ships Agents Association*

Membership: 40

Contact: *Mr. P. Cooney*

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Member of FONASBA

Population	4,156,119
GDP 2006/7:	US\$ 186.2 Billion
Total Volume of Exports 2005/6:	US\$ 115.6 Billion
Total Volume of Imports 2005/6:	US\$ 84.2 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 ISAA represents Irish Ship Agents nationally and internationally. We have a working council of 12 members who meet on a regular basis throughout the year. We have two associate members (Belfast Ship Agents' Association and Irish Port Employers' Association) and we are officially recognised by the Department of Marine as a representative body. We are in close and regular contact with the Dept of Marine on all relevant developments and proposals. We also meet regularly with The Irish Maritime Development Office on matters of mutual interest. We provide representation at ECASBA and FONASBA meetings.

Our association is always at hand to assist any Port that may have issues that need to be addressed either at a local or national level. Many infrastructural proposals are presently in progress throughout the country with input from our Association's members being of great assistance to those concerned. Such proposed developments will enhance and improve the efficiency of our ports in the coming years. This in turn will ease congestion in our ports and improve the turn-around time of visiting vessels. Significant improvements are also being made in cruise line, passenger and Ro-Ro facilities in our ports thus increasing the overall attraction for all types of shipping into Irish ports. Please see our website for regular updates on activities in our ports and in particular with the Irish Ship Agents' Association.

Member Association Report — ISRAEL

Association: *The Chamber of Shipping of Israel*

Membership: 48

Contact: *Mr. R. Zuck—President*

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website: www.shipping.org.il



Population:	7, 500,000
GDP 2006/7:	US\$ 160 Billion
Total Volume of Exports 2006/7:	US\$ 68 Billion
Total Volume of Imports 2006/7:	US\$ 70 Billion
Principal Commodities Imported:	Consumer goods, raw materials, investment goods, fuels, diamonds, ships and aircraft
Principal Commodities Exported:	Agricultural products, manufactured goods, diamonds

During 2007 Israeli Ports handled 36.3 million tons of cargo (excluding oil & coal in bulk) which represents an increase of 11% compared to 2006. Automatic Bulk installations handled 4.1 million tons which represents 17% increase compared with 2006. 217,000 cars & trucks were discharged which represents an increase of 32% compared with 2006. 57% of it in Eilat Port. Containers traffic was increase by 11% compared with 2006 and total TEU throughput was 2 million, 58% through the Haifa Port & 42% through Ashdod. Main origins of the Israeli import were West European & East Med. and Far East countries. Major destinations for the Israeli export were West Europe & East Med. Ports and the USA. Unfortunately the forecast for 2008 & 2009 are not optimistic and many of our members are expecting decrease in the volumes of their activities.

The Chamber of Shipping of Israel is celebrating this year its 75th anniversary. During all the years we have represented all the Shipping Companies (Principals & Agents), calling to Israel in order to improve Ports' efficiency and productivity and by doing this we have supported also the developing & expansion of the Israeli Maritime Trade. In 2008 we have established an official Lobby in the Israeli Parliament (Knesset), which will concentrate its activities on our main goals.

Ports: Congestion in Israeli Ports was eventually terminated, mainly because of our intervention and demand, which were all accepted, for more labor and better efficiency in the Ports. Regretfully productivity is still on the low side resulting in small congestion, from time to time, mainly with the containers traffic, causing also Congestion Surcharge which is being implemented by some of the Carriers. A new "Operational Turn" is being now introduced enabling the Med. Ports of Ashdod & Haifa to dedicate about 50% of their container piers for "windows" contracted to Carriers calling on a "fixed day call". We believe that it may improve Ports efficiency & Productivity for the benefit of the Lines serving Israel.

Ports new Tariff: A proposal for Ports Tariff revision was prepared by the Government. New proposal is trying to minimize " cross subsidy" between vessels & cargo by mainly reducing the wharfage (1.02% on C.I.F. value for Import & 0.20 % for Export), which is today covered in full by Shippers & Receivers, and increasing drastically Ports dues & handling charges . The Chamber of Shipping together with other Organizations representing the Shippers & Receivers are objecting to the proposal and trying to work out another mode which may ease the drastic increase planned by the Government.

Training : We have continued together with the Israeli Maritime Association in our joint seminars where more and more people from the industry are meeting and discussing issues of mutual interests. Our 2nd Shipping Course for the entire shipping community in Shipping Management & Operations is scheduled for November 2008 in cooperation with the Israel Management Center

IT : Import process is already fully "paper less" and we are now together with all other organizations involved moving ahead with the Export process.

MofS: The Chamber of Shipping is participating in the Motor Ways of the Sea (MOS) project initiated by the European Union and is being now evaluated for implementation by the Israeli Authorities and local Shipping Companies.

Licensing: The Chamber of Shipping of Israel is continuing its efforts to license the activities of the Ships Agent in Israel.

Member Association Report — ITALY

Association: *FEDERAGENTI*

Membership: 580

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Population:	59,619290
GDP 2006/7:	US\$ 2.105 trillion
Total Volume of Exports (2006/7):	US\$ 656.4 billion
Total Volume of Imports (2006/7):	US\$ 649.9 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 have been developing several important activities during last year under the chairmanship of Filippo Gallo, who has been elected to the Chairmanship of the Association during our last Meeting held in Livorno in May 2008.

Italy have kept a low pace of growth during last year, this due to lower growth of our national GDP compared to several other European Countries, even in presence of an apparent good attention by our last Government, ended in April, to Shipping activities, often jeopardized by a still too poor infrastructural system. Our infrastructures are still not good enough and often investments have been promised or effected more on project with high visual impact than a real possibility of beneficial effects on the economy, this also being caused by the General Elections which we had in April due to the end of the Legislation three years in advance. The new Government did not show until now big actions even if we are now hopeful that something can be done in the improvement of our Legislation concerning Ports and Terminals Management, as well as on Short Sea and Motorways of the Sea.

We are still suffering the same problems with dredging and consequent impossibility to increase drafts in few Ports which is limiting the expansion of traffics, this despite being in a pivotal position in the middle of the Mediterranean Sea.

The change in Government which happened after our last elections could lead to some beneficial changes in this pattern. The first moves of the new Government are encouraging, funds are still available to Port Authorities to invest in Ports, as well as a specific attention is paid to Sea Transport even on Domestic routes. We hope that when writing next year report the optimism will be translated in actual things happened.

Federagenti have been heavily involved in a continuous activity to promote Shipping in Italy as well as the image of our Industry to other categories to make ourselves well known in all the country and specifically by a continuous lobbying activity towards the Decisional centres.

We have been guaranteeing a continuous support to all initiatives addressed to modernize the laws and regulations of the Country, this in very good harmony with other Associations and Federation in the Industry, first of all Confitarma, and Fedespedi, the Forwarders' Association.

Federagenti have nowadays a total of 22 federated Associations from 22 Italian Ports, incorporating a total of just under 600 Company members in the Country. Our associates have a total of about 8000 employees.

Our Federation have worked in strict conjunction with Port Authorities in Ports development, always via our local branches. Our Chairman has visited during last year a total of 11 Local Associations, this to guarantee to all of them full support from the National body.

Last year we did start a project to develop Education and Training in Italy in co-operation with the Institute of Chartered Shipbrokers and Tutorship. This have been finalized this has resulted in a very good success, with about 200 Students involved in the first course; our Ente Bilaterale, a body composed by Federagenti and Trade Unions which is specially built to work on Education and Training of our personnel, has been approved as a Distance Learning Centre and is presently starting to supply Tutorship courses which are made available to all of our crew. The second course has just started with a similar number of participants and we hope this will carry on also in future. Few Italian students sat the ICS exams in 2008 and they all had very good results.

We are carrying on our promotion and external Communication activity to make our Federation more and more known in all trading and production activities in our country, this with the very important help of Della Silva Communication.

The Branch dedicated to Agents working with Yachts and Sailing Boats is quickly developing its activities, whilst our Young Shipagents Branch, very proudly managed by Gian Enzo Duci, is expanding more and more and is considered as good practice in the Industry, something which we see as a possible good sign for our future.

Member Association Report — JAPAN

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

Membership: 114

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Population 127,800,000

GDP 2006/7: US\$ 4.847 Trillion

Total Volume of Exports (2006/7): US\$ 649.9 Billion

Total Volume of Imports (2006/7): US\$ 579.6 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 for the members within Japan.

During last period of June 2007~ May 2008, JAFSA had expended a most efforts for 20th Anniversary which held on last April. And JAFSA had very warm ceremony with all participants such as Government's officers, concerned Public Associations and our Members on April 4th 2008 at Intercontinental Hotel Tokyo Bay.

Meantime, JAFSA undertook following activities as usual.-

- a) Monthly Board meeting.
- b) Issuing 'JAFSA News' monthly in Japanese, and sending same together with all relevant documents of Government and Public organizations' Notices and/or Information.
- c) Seminar about 'Next step for EDI (Single window)' & Beer Party on July, 2007
- d) Seminar about 'Japanese consumption tax and Ship's Agency' on November, 2007
- e) JAFSA annual Meeting on April, 2008
- f) JAFSA Spring Golf Competition May 2008
- g) JAFSA Autumn Golf Competition was suspended due to typhoon on October, 2007)
- h) JAFSA distributing 'Japan Port Information' and Authorized Blank Forms of 'Tax and Exemption for harbour services'

We as JAFSA are represented on several Government and/or Public Organizations committees covering Maritime issues such as:

- a) Safe Navigation and pollution prevention in Tokyo Bay
- b) The new facilitation of all harbour documentations (combined EDI and Custom Clearance) committee.
- c) Marine accident prevention committee during constructing Haneda International Airport.
- d) Maintaining safe Navigation in Tokyo Bay while reclaim land from the sea at Port of Tokyo.
- e) Case study committee for New Immigration Law. i.e. Required all Foreigners to have Fingerprinting Portrait when visiting Japan, in which case how to handle huge Passenger Boat on boarded over 1500~2000 passenger.

Member Association Report — KENYA

Association: *The Kenya Ships Agents Association*

Membership: 28

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Population:	37,953,840
GDP 2006/7:	US\$ 29.3 billion
Total Volume of Exports (2006/7):	US\$ 4.054 billion
Total Volume of Imports (2006/7):	US\$ 8.54 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

Impact of the post December 2007 General Elections on Port Operations.

The violence that erupted after the 2007 Presidential elections result had a very negative impact on the whole transport chain in the country. This resulted in a build of containers and other cargo at the port of Mombasa. When the situation normalized in mid-March there was a hue and cry from the shippers regarding storage and demurrage charges which had accrued during the period of unrest. Consultations were held with the stakeholders in the whole region at very high levels and it was agreed that the charges would be waived by both the port and shipping lines.

Kilindini Waterfront Automated Terminal Operations System (KWATOS).

In their endeavour to improve service delivery and keep up with technological advancement, the Kenya Ports Authority (KPA), on July 1, 2008, introduced KWATOS which is simply a paperless document processing system. The system, which is now stabilizing, had very serious teething problems. The off-shoot of that was the rise in yard population coupled with ships waiting for up to ten days or more before berthing. Added to this was the drop in quayside productivity as there was no room to land containers. This state of affairs resulted in some shipping lines having to introduce Vessel Delay Surcharges for all containers landed or loaded at Mombasa. In mitigation, KPA decided to use electronic documentation where that was possible but resort to hard copies where problems exist. That helped a little. The yard is still congested and vessels are still waiting for more than seven days.

Clearance of Goods from the Port.

The clearance of goods from the port has for a long time not been satisfactory and we have situations where minimum dwell time for containers runs up to two weeks as opposed to other ports where the maximum time does not exceed forty-eight hours. These and other issues were raised when the Prime Minister visited the port on August 11, 2008 to look into the problems of the port. The stakeholders comprising of ships agents, clearing and forwarding agents and transporters made it known to the Prime Minister that the congestion and the clearance of cargo from the port could not be blamed on KPA alone but also other service providers such as the Kenya Revenue Authority, Kenya Bureau of Standards and Port health. On the same day of the meeting the President of the Republic of Kenya gave a directive that the port will hence forth operate on twenty four hours seven days a week meaning that all service providers are to provide services on that basis.

Railage of goods to and from the port of Mombasa.

This operator is still having problems and has not managed to transport more than 10% of the goods passing through the port for hinterland destinations. This is putting a lot of pressure in the country's road network. It is hoped that with the recent changes in the top management the situation will change for the better. On the issue of transport, a directive was recently given that all trucks using Kenyan roads to have only three axles as opposed to the present four. This is a move in the right direction as it will save the country's roads but in the initial stages it will add to congestion in the port and an increase in transport costs.

Extension of the port to Container Freight Stations.

This extension was made with a view to helping decongest the port and towards the end of 2007 two freight stations had entered into agreements with the port operator. However, as the major problem lies with cargo clearance procedures as required by customs, the congestion has now extended to the freight stations.

Member Association Report — LITHUANIA

Association: *The Lithuanian Shipbrokers & Agents Association*

Membership: 47

Contact: *Mr. V. Shilieka*

Lithuanian Shipbrokers and Agents Association

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Population:	3,565,205
GDP 2006/7:	US\$ 59.6 billion
Total Volume of Exports (2006/7):	US\$ 17.2 billion
Total Volume of Imports (2006/7):	US\$ 22.8 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

Operating for almost thirteen years, the activities undertaken by the Association are very relevant to every company involved in the maritime industry. The Association bases its activity on the principle of co-operation with many public institutions as well as with Klaipeda State seaport authorities, Ministry of Transport and Communications and other organizations actively engaged in the field of sustainable development of maritime policy and management. Our main aims and objectives are to strive for more favourable business conditions, to defend rights, liberty and lawful interests of the members of Association, and to prompt cooperation, training and competitive ability among the members. Also we help company members solve their economical, juridical, financial problems and represent them at the State and government institutions. For more than 6 months we worked closely with the Klaipeda State seaport authority on developing new regulations on the application of State seaport dues, which in June 2008 were approved by Order of the Minister of Transport and Communications. Also project of Law on Klaipeda State seaport of the Republic of Lithuania is now reviewed by specially for that purpose created committee and director of Association is one of its members.

The Lithuanian Shipbrokers and Agents Association consists of 40 companies operating in agency, shipbroking, crewing, shipmanagement and freight forwarding sectors. The Association is a non-profit organisation that meets once per quarter to discuss and plan out the marketing for the future activities. In May 2007 new elections of President and the Board took place in our Association.

The 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 and Communications of the Republic of Lithuania.

The attractive tradition has born in the Association to arrange a joint Christmas and New Year party, inviting Port and city officials and politicians to participate. In April this year it was 10 years anniversary as traditional Basketball tournaments were held for members of Association and their families.

At present Klaipeda is the only seaport in Lithuania. The developed infrastructure of the port, its 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. Major trading partners are Germany, UK, Russia and Scandinavian countries.

Member Association Report — MEXICO

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

Membership: 56

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Population:	109,955,400
GDP 2006/7:	US\$ 1.346 Trillion
Total Volume of Exports (2006/7):	US\$ 271.9 Billion
Total Volume of Imports (2006/7):	US\$ 283 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

From June 1st 2007 to May 30th 2008, we had been making important activities for the sector. Last September, the legal effects started for the rule 2.4.5 from the General Character Rules in Foreign Trade Matters for 2007. This rule dictates that all maritime transportation companies must provide all the information regarding the carried and consigned merchandise in the cargo manifest, through electronic data transmission to the associations' or guild chambers' system to which general steamship agents or port agents belong; without the need to physically submit the information to the customs authorities. This information must be transmitted 24 hours before the goods are loaded on the vessel.

This regulation also became mandatory for Freight Forwarders; this is rule 2.4.13 from the General Character Rules In Foreign Trade Matters for 2007. Nevertheless, the difference between rule 2.4.5 and 2.4.13 is the information that each actor must transmit: the freight forwarder must transmit the "House Bill of Lading" and the shipping agent must transmit the "Master Bill of Lading". This Association has taken advantage of this new regulation, providing increasing services to freight forwarders.

AMANAC has been developing a new software system for electronic transmission users, called "SEAMAN". This tool can be used either by shipping agents or freight forwarders.

On August 4th 2007 we celebrated AMANAC's 20th anniversary, and we organized a formal dinner for this special occasion. AMANAC's 13th Annual Meeting was made on September 2007, formally celebrated as well.

In addition, the Association has participated in meetings convened by the Mexican Congress in order to change the current Port Law. It is important to say, that we have not moved forward in this matter yet, but we know it will happen very soon.

On the other hand, AMANAC has also participated on changes to the current Taxes Law. This is because the Mexican Congress pretends to impose new taxes for cruiser vessels passengers, which is a very controversial situation in Mexico right now. We still do not have a final document about it, though.

AMANAC accomplished, along with the migratory authority, the simplification to the transmigration crew process.

AMANAC had an important intervention on the new rule NOM-012-SCT-2-2008, which specifies the weight and dimensions of the trucks that are able of circulate in Mexican territory.

Member Association Report — MOROCCO

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

Membership: 54

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Population:	34,343,220
GDP 2006/7 :	US\$ 155 billion
Total Volume of Exports (2006/7):	US\$ 12.75 billion
Total Volume of Imports (2006/7):	US\$ 27.14 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

In 2007 several actions were undertaken by the Association in view to improve the level of the maritime industry and services and to reach the international maritime standards of efficiency and quality.

Reform of the harbour activities:

As previously reported the reform of the harbour activities in Moroccan ports which has entered in force since December 2006, has not yet produced sufficient results at the level of port services quality and the performance of the designated operators. However a good improvement of the stevedoring costs which decreased by 20% has been registered.

In 2007 an increase of 20% of the containers traffic was registered in Moroccan ports and mainly in Casablanca port, this huge increase for such a short period of time (one year) forced the government and public authorities to launch an investment program in view to lift the Casablanca port capacity from actually 700.000 EVP to 1.500.000 EVP for the next couple of years.

Beside Marsa Maroc, the first stevedore operator, which started its activities in 2007, the second one (SOMAPORT) will start operating in the second terminal by the end of the year. A third terminal with a capacity of about 500.000 EVP will be launched soon and studies are actually conducted by the public regulatory agency (ANP) in view to build up a new important capacity terminal in Casablanca.

Bill concerning the agency and broking professions:

Association was still conducting hard discussions and negotiations with the government through the merchant marine administration in respect of the forthcoming regulations of the activities of the ship agents and brokers and their requirements. Our association implemented a number of amendments to be discussed with the hope that we shall reach a final and consensual agreement.

FONASBA quality standards:

A dedicated technical commission has been designated in view of convincing our members to adopt it since we believe that this issue will provide a further quality enhancement.

APRAM tariffs:

A dedicated commission has finalized the preparation of APRAM recommended tariffs of agency fees and disbursements since the analysis of the numerous observations made by our members had been done and reached a consensual agreement.

Code of conduct and ethics:

Another APRAM commission as well studied this issue and prepared a draft to be discussed and adopted shortly by our executive committee. We consider this matter with great concern since we believe that our members must be fully committed to respect a fair practice of our profession.

Containers in transit:

APRAM suggested a great simplification of the heavy existing practice and obtained after several meetings from custom authorities a new regime more simple for the treatment of the formalities concerning containers in transit

APRAM young section:

Some meetings had been held by its members. However we must admit that efforts and progress remain to be done for boosting the performance of this section.

General Assembly:

APRAM has held its general Assembly on 30 June 2008 when a new executive committee has been elected in total transparency. Finally we may say that APRAM becomes more involved and proactive in the shipping industry and the ports services participating actively in various working groups concerning several issues like custom regulations, portnet system etc, getting ship agents more listened by government authorities and as an important actor in the development of the port community system and economy

Member Association Report — VRC, NETHERLANDS

Association: *Vereniging van Rotterdamse Cargadoors (VRC)*

Membership: 106

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Population:	16,500,000
GDP 2006/7:	US\$ 565 Billion
Total Volume of Exports (2006/7)	US\$ 446.2 Billion
Total Volume of Imports (2006/7)	US\$ 385.9 Billion
Principal Commodities Imported:	Machinery and transport equipment, chemicals, fuels, foodstuffs, clothing
Principal Commodities Exported:	Machinery and equipment, chemicals, fuels, foodstuffs

VRC is keen to establish a strong yet positive profile for the Port of Rotterdam region, in the widest possible sense, primarily for its members, both ordinary and associate. The VRC also wishes to promote the interests of the entire Rotterdam region. Our ultimate aim is a well-functioning port, which importers, exporters, charterers, freight forwarders and shipowners all find attractive, not least because of its favourable price-quality ratio. In other words, we are for cargo and ship. We in Rotterdam are gradually approaching the time, in another twenty years or so, when we will be handling some twenty-five million containers. And this number excludes the growth in bulk goods. This is certainly something to be proud of.

Despite the advance of computer systems, there is no doubt that it will always be vital to have hands available to do much of the work. A study into training and the labour market carried out on behalf of Deltalinqs and Mainport Rotterdam Knowledge Infrastructure has revealed that the shipbroking sector alone has vacancies for between 150 and 250 new employees a year. VRC has picked up the challenge, and has started a recruitment campaign. Among the elements of this public campaign are the website www.cargadoorworden.nl, a job bank, advertisements in relevant daily and weekly newspapers, and new promotional material in the form of leaflets.

An increasing goods flow necessitates the good use of all available capacity, sound planning, and, above all, communication. VRC is pleased that Port infolink has now been firmly on track for a couple of years. Besides the paperless transfer of data to the authorities, such as Customs and the Port of Rotterdam Authority, Port infolink is also improving contact between the individual commercial parties in the port. A Port infolink representative explained the Service Cargo Information module at the meeting of members. This module allows individual shipping agents and parties interested in the cargo to exchange data. However, despite being available for some considerable time, there are several reasons why too few shipping agents are yet connected, and the functionality of the module itself is not yet optimum. This situation inevitably entails many telephone calls between the parties, which was not what was intended. Everyone, and certainly shipping agents, are aware that the growing cargo flows make optimum communication essential. Without wishing to sound boastful, we may say that the shipping agents united in VRC have made a major contribution to the development of the port in the past hundred years, including in the area of communication. VRC intends to continue in this vein for the next hundred years.

Much effort is being put into AEO, which is mainly a safety measure. Companies with AEO status will have fewer customs inspections, whereas others, conversely, will be scrutinized more closely. The CoPaCo scheme will also be reserved for AEOs. AEO status will be awarded on a self assessment basis. An information meeting for members was held on 11 October of the reporting year. The Import Control System (ICS) is now being worked on, and is planned to start in mid 2009.

Container scanning is an increasingly common occurrence in the Port of Rotterdam, in connection with the rising handling statistics for general cargo.

The Export Control System (ECS) has been operational for indirect exports since July 2007. From October 2007, Dutch exports have been administered through ECS. From 1 July 2009, on the basis of the amended European Community Customs Legal Code that comes into force on that date, Customs will make electronic reporting of the two messages (arrival at terminal and loading list) compulsory. Because the Community Customs Legal Code is insufficiently explicit about who is responsible for reporting (i.e. trader at exit), Customs advised in early 2007 that the stevedore was to be responsible for the arrival notification at the terminal, and the shipping agent for the loading list (including MRN). How all the above will proceed in practice was, and is, a subject for negotiation between the parties. Port infolink recently stated that it will be able to assume several duties in relation to ECS.

Member Association Report — NORWAY

Association: *Norwegian Shipbrokers' Association*

Membership: 141

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Population:	4,737,171
GDP 2006/7:	US\$ 389 Billion
Total Volume of Exports (2006/7):	US\$ 178 Billion
Total Volume of Imports (2006/7):	US\$ 117 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)

Activities

Education has been a main focus of our activities this year because we believe that building competence is a crucial activity for our association. We are very pleased with the success of the TutorShip programme we manage in Norway, a programme developed by the Institute of Chartered Shipbrokers in London

Our activities have also 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. This matter is still pending a resolution.

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, our legal consultant and the administration of our association. We work closely with other maritime organisations to promote the shipping interests in Norway, and are represented on the Board of Directors of the most influential maritime industry organisation in Norway, the Maritime Forum. Membership benefits are also important for us and about half our members are in our pension plan deal. Their combined savings are considerable.

Our annual general meeting this year took place in Oslo in May at the recently finished Norwegian Opera House and was a huge success, both in terms of venue as well as the meeting, seminar and social activities.

Norwegian Shipping

As of April 1st 2008 The Norwegian controlled fleet totalled 42,1 million dwt, an increase of 5,3% since January 1st 2007. The total number of ships is 1839, and of these 48% fly the Norwegian flag, which is down 2,5% since January 1st 2007.

Building orders of ships for Norwegian account increased to 387, of these 165 ships were off shore service vessels (122 built at Norwegian yards). In addition 29 mobile offshore units were on order as of 1st April 2008, representing 17% of the world's order book. The total value of ships and rigs on order for Norwegian account is NOK 179 billion (USD 33 billion). The Norwegian yards accounted for the largest number of vessels on order from Norwegian shipping companies with 123 ships. This year China ranked second with 92 ships, thereby passing South Korea with 68 ships, Japan with 23 ships and India with 20 ships.

The main turbulence in the industry this past year has been the introduction of the new tonnage tax system, which finally is competitive compared to the European Union. The introduction of the new system cancels the old tonnage tax regime and the Government has decided to demand payment of the total tax credit accumulated under the previous regime, a total of NOK 21 billion (USD 4 billion). No shipowners have calculated with having to pay this as long as they remained in the system, consequently some shipowners are taking the Government to court.

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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Population:	10,676,910
GDP 2006/7 (US\$):	US\$ 223.1 billion
Total Volume of Exports (2006/7):	US\$ 51.50 billion (FOB)
Total Volume of Imports (2006/7):	US\$ 75.30 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 Azores Islands.

With about ninety members and playing an important role within the shipping community, AGEPOR has been very active since it was created in July 2000 replacing the two major existing Portuguese Associations. AGEPOR has the mission and the role of protecting actively the ship agents companies as well as promoting the interests of the ship agency profession, both in Portugal and internationally, ensuring a high profile and a recognition of the importance of the profession.

In Portugal AGEPOR has been recognized by all Governmental bodies as a valuable interlocutor for all matters relating directly and indirectly to the shipping industry. AGEPOR plays also a paper as an advisor and even more important as a partner in some of the specific national projects in the Maritime Sector, such as the one currently being implemented related to the electronic transmission of all the shipping manifests to ports and Customs.

Recognizing the continuous need of disseminating the importance of the role of the shipping industries among the politicians, media and public AGEPOR has been involved in lobbying continuously in 2007 in favour of the maritime economy development in Portugal.

In 2007, holding the Vice-Presidency and the Executive Direction of the Portuguese Shortsea Promotion Centre, AGEPOR has chaired the ESN – European Shortsea Network for the 2nd half of the year having the role of organizing in Lisbon in December the meeting of the Focal Points (Short Sea Shipping and Motorways of the Seas), DG-TREN and Shortsea Promotion Centres. By the time and taking the advantage of having already the experts together in Lisbon, AGEPOR has organized (under the hat of the Portuguese Shortsea Promotion Centre) the II Marco Polo Seminar with more than 200 participants belonging to 19 different countries.

For many years education and training have been priority projects within the Portuguese agency industries and AGEPOR has been developing and providing both internal and external courses which are proving very successful within our membership. It is important and remarkable that AGEPOR organized 2 Focal Gloss courses in the European School of Shortsea Shipping with about 100 participants sailing from Barcelona to Genoa and Civitavecchia, enabling all students to understand better the need of shifting cargo from road to sea.

Finally AGEPOR is actively involved in FONASBA/ECASBA being responsible for the Working Group of SSS, member of the Liner Working Group and occupying the Vice-Chairman of ECASBA.

Member Association Report — SLOVENIA

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

Membership: 24

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website:

Population:	2,025,866
GDP 2006/7	US\$ 46.08 Billion
Total Volume of Exports (2006/7):	US\$ 27.01 Billion
Total Value of Imports (2006/7):	US\$ 29.28 Billion
Principal Commodities Imported:	Fuel, cereals and food products, motor vehicles, textiles
Principal Commodities Exported:	Wood products, industrial goods and domestic appliances

On December 21st 2007, Slovenia entered the “Schengen” area and this significantly reduced the volume of information that the maritime agent is required to lodge with the authorities in relation to vessels arriving from other countries within the “Schengen” area.

On January 1st 2008, Slovenia took over the Presidency of the European Union, the first of the new member states to do so and the general opinion is that the six month term was a success.

In a move contrary to the general European trend of opening port services up to competition, the port of Koper was this year awarded a 35 year contract to provide the full range of port services, including stevedoring, warehousing, mooring services, waste collection and the provision of logistics services, which includes port agency services. Clearly this development is of particular concern to our association.

This year the association managed to secure official recognition of maritime agency as a profession and those individuals who meet the criteria, in terms of length of service in, and experience of, the industry have already been accredited as authorised maritime agents. New entrants to the profession will henceforth be required to undergo appropriate and relevant training and the first intake of 15 students are currently undergoing training and will, we hope, be granted accreditation in October.

Unfortunately, the Slovenian anti-trust authorities continue to consider our association members as a cartel and we are maintaining our opposition to their position. We are hopeful that the matter will be resolved in the next few months but it is likely that some form of written warning about our activities will be issued.

Member Association Report — SOUTH AFRICA

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

Membership: 128

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Population:	48.7 Million
GDP 2006/7:	US\$ 290 Billion
Total Volume of Exports:	US\$ 63.4 Billion
Total Volume of Imports:	US\$ 71 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

SAASOA was formed with the purpose of promoting and advancing the interests of Ships Agents, Shipping Lines (Vessel Owners and Operators) and Brokers, on all matters of common interest. SAASOA was formed in July 2007 as a merger between:

- o The Association of Ships Agents and brokers of Southern Africa (ASABOSA);
- o The Association of Shipping Lines (ASL), including the Container Liner Operators Forum (CLOF)

SAASOA aims to be recognised by all stakeholders as the leading organisation representing maritime industry interests in South Africa on behalf of its membership. In keeping with its objectives, SAASOA participates in a variety of forums with relevant stakeholders, namely: Transnet Port Terminals, Department of Transport, South African Maritime Safety Association, Transnet National Ports Authority, Transnet Freight Rail and other national government departments.

The South African Port System

Transnet, the parastatal ports and rail operator, is undertaking an R80billion infrastructure investment programme aimed at building capacities in the South African port and rail network. Recent developments include the reconstruction of Pier 1, adding 800 000TEU of capacity as well as the imminent opening of the Ngqura port container terminal in September 2009, adding a further 1million TEU of capacity. As an example of the impact that these investments are making, the Port of Durban handled approximately 70 000TEU/month in 2002. This figure had increased to 200 000TEU/month by 2007. These achievements are also driven by the Vukilela Project: a port optimisation programme looking at improvements in productivity and efficiencies within the Terminals.

The eight official South African ports are: Richards Bay, Durban, East London, Ngqura, Mossel Bay, Port Elizabeth, Cape Town and Saldanha Bay. The Richards Bay Coal Terminal is the biggest coal handling facility in the world. Saldanha handles bulk cargo whilst Port Elizabeth and East London handle mainly vehicles and their components. Durban is the busiest container handling port on the continent, also handling a large number of vehicles. Cape Town handles a general mix of cargo and containers. An excellent resource for South African port-related information is: <http://www.transnetnationalportsauthority.net/>

Current and future Association activities...

SAASOA is involved in several forums, as follows. The Maritime Industry Development Council looks, amongst other things, at enhancing the competitiveness and attractiveness of South Africa's maritime industry, as well as promoting, training and education at all levels. The eThekweni Maritime Cluster is a platform currently being created with the intention to lower costs of doing business throughout the maritime logistics chain, as well as providing the necessary identified training and education to this industry. SAASOA also participates in the National Port User Forum and local and national Port Consultative Committees, formed under the auspices of the National Ports Act, which consult with the Port Regulator to ensure sufficient capacity development in the South African port and rail system.

Much influential legislation which impacts upon the maritime industry has been formulated of late. SAASOA ensures its meaningful input on all legislation of this nature. Recent developments include: proposed tonnage tax legislation; the Ten Year Sea Way Strategy, the Draft South African Maritime Transport Policy as well as the Draft Convention on the Carriage of Goods by Sea.

We are still awaiting approval of the National Port Master Plan, currently with Cabinet.

The major challenge facing SAASOA is the follow through and sustainability of all these initiatives, which will ensure that membership interests are enhanced and that South Africa remains globally competitive within the international shipping industry.

Member Association Report — SPAIN

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

Membership: 141

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Population:	40,491,051
GDP 2006/7:	US\$ 1.352 Trillion
Total Volume of Exports (2006/7):	US\$ 252.4 Billion
Total Volume of Imports (2006/7):	US\$ 373.6 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 meeting of the Ship Agents Executive Committee of ANESCO held on March 13, 2008, Mrs. Alicia Martín Garachana was assigned to President of this Committee and Mr. Baltasar de Diego to Vice-president, appointments to be ratified by the ANESCO General Assembly at the end of the year.

This year it has been a cause of concern for Spanish ship agents a Judgement of November 26, 2007, pronounced by the Supreme Court, unifying the doctrine, which holds the ship agent liable for cargo damages during sea transport, meaning therefore a return backwards with respect to last advances achieved in the jurisprudence field.

For this reason, ANESCO with the cooperation of the Association of Maritime Law organized an Event on Ship Agent's Liability on March 12, and later on, on April 3, with the cooperation of the Lawyers Firm Garrigues, another Event on the ship agent's liability for goods carried by sea.

Formative activities for recycling and knowledge extension for staff of ship agencies have continued to take place in a similar way to previous year. To this effect, the Asociación Naviera Valenciana (Valencia Association of Ship Agents), with the cooperation of Fundación Valenciaport, has planned a number of courses for the last quarter of this year.

Likewise, the Barcelona Ship Agents Association imparted a course on shipping business for professionals of the sector.

The development and application of the Short Sea Shipping continue to be a motive of an intense activity in the sector, cooperating ANESCO through the Spanish Association for promotion of SSS.

Last October, it was held the 46th Congress of Naval Engineering, in Seville, on strategies for the Maritime Sector, taking place a Round Table on Motorways of the Sea.

On November 15 and 16, the Spanish Association for Promotion of SSS participated in the Short-Sea Conference 2007, in Bruges (Belgium), where the formative practices of said Association were explained.

Finally, in the university scope, from 1st to 4th of March, a workshop was held aboard the vessel Numine, of the European School of SSS, for pupils from a Master on transport and logistics of the University of Granada.

Member Association Report — SWEDEN

Association: *The Swedish Shipbrokers' Association*

Membership: 136

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Population:	9,045,389
GDP 2006/7:	US\$ 455.3 Billion
Total Volume of Exports (2006/7):	US\$ 170.2 Billion
Total Volume of Imports (2006/7):	US\$ 150.6 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

Membership: Sweden has 136 members, decreasing every year. The reason for the reduction is consolidation, larger companies buy smaller ones. This will probably create a problem in the long run because we have one single fee, equal to all members despite size.

Annual meeting: We had a fabulous annual meeting in Malmö in May. 117 members and guest (sponsors) attended the meeting where we also spent the day cruising in Öresund.

We had an autumn meeting in Helsingborg last year, attended by 90 members. That meeting had a formal agenda where we discussed the new situation for our Maritime Administration, Customs & AEO amongst other things. We also discussed how to solve our problem with ship owners not paying their invoices for pilot and fairway dues, invoices that our members have to pay regardless if they get the money or not. We decided to form a kind of "Black list" on our website, as a warning over bad ship owners. We also decided to take action to try to change the strict liability for payment. As a very quick response a ring of solidarity grew and ten members who had almost 1 million in overdue invoices could receive the money when all members within the association decided not to handle the companies' ships before they had paid all overdue invoices.

Economy of the association: The economy is good within the association, due to our bigger focus on education.

Developments within the industry: At the moment we have a discussion about the trend that more and more ports also provide agency service and forwarding. According to Swedish law there is nothing we can do, more than focusing on being the better part for the ship owner!

Currently we are also discussing the Danish influence in Sweden, due to the Danish bid on Broström AB. Röda Bolaget and Tor Line are already 100 percent owned by DFDS and Switzer and now Maersk want to buy Broström.

Education: We have a decrease in TutorShip, only 20 students enrolled and out of them 10 decided to take the exam. Only four succeeded. But we are looking forward to the launch of the Advanced Diploma; we include that in our Fonasba Quality Standard as a requirement for approval.

We have also focused on one day courses. We have had one in co-operation with ICS (Liner Trade) and another two developed by ourselves: Container knowledge and Bill of Lading.

Political decisions affecting the industry: We can't really see any at the moment, more than the review of the Maritime Administration, but there are no decisions yet taken.

Other issues: We have decided to apply for the Fonasba Quality Standard.

Member Association Report — UNITED STATES OF AMERICA

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

Membership: 188

Contact: *Mrs. J. Cardona*

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Population:	303,824,646
GDP 2006/7	US\$ 13.84 Trillion
Total Volume of Exports (2006/7):	US\$ 1,149 Trillion
Total Volume of Imports (2006/7):	US\$ 1,965 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. ASBA will celebrate 75 years of service to the maritime industry with a Black Tie Dinner on January 17, 2009 at Steiner Studios in the Brooklyn Navy Yard.

ASBA Agent Members completed their annual review for Agent Certification; full details are available on our website. This year ASBA agents gained further recognition, as ASBA was one of the first associations to be approved for certification by FONASBA. FONASBA's Quality Standards embrace the same principals as our Guidelines, which confirms its value to principals as they will be able to identify "quality agency providers" not just in the U.S.A., but worldwide. ASBA and FONASBA can now work together to promote and encourage principals to appoint quality agents for hassle free port calls.

ASBA's Charter Party and Documentary Committee is proud to announce the release of "ASBACHEMVOY". Given the popularity of the use of ASBATANKVOY by the Chemical trade, the committee reworked 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 in October 2008.

ASBA continues to monitor legislative activities in Washington, D.C. that will affect members. We remain an active participant in the National Association of Maritime Organizations (NAMO). ASBA has partnered with NAMO to raise U.S. government awareness of the uniqueness of the bulk trades, which typically are not represented at maritime roundtables. Senate Bill 3174, which included a requirement for licensing of ship agents, was introduced in June, 2008. ASBA has been invited to participate with the Senate Committee in charge of advancing the bill. More specifically we will work with them on the licensing issue. ASBA continues to benefit from participation in CIANAM and expects that this organization will become a strong maritime voice for the Americas in the years to come.

ASBA's educational offerings have been well subscribed in 2007 & 2008. 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. Our two-day live seminars, The Business of Shipping Intensive I and II, will be offered in Stamford, Connecticut and Houston, Texas in the fall of 2008. Our 2009 schedule will be announced by year end.

The ASBA Annual Cargo Conference in Miami, Florida continues to grow in popularity. The conference committee works diligently each year to create a program which will appeal to brokers and agents alike. A broad range of speakers deliver presentations on issues of particular interest in the tramp trades that year. Delegates enjoy the benefits afforded by the conference size, averaging just over 140 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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