

THE FEDERATION OF
NATIONAL ASSOCIATIONS OF SHIP
BROKERS AND AGENTS

1969 -2009
40
FONASBA



FONASBA

**ANNUAL
REPORT
2008/9**

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

July 2008 to June 2009

Cover Photograph: Opatija Croatia, location for the 2008 Annual Meeting.

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TABLE OF CONTENTS

Introduction by the President, Tonny Dalhøj Paulsen	5
The Year In Perspective Jonathan C. Williams FICS, General Manager	7
FONASBA Membership List	8/9
Structure of FONASBA	10
2008/9 Executive Committee	11
FONASBA Code of Conduct	12/13
FONASBA Standard Documents	14
European Report Antonio Belmar da Costa, ECASBA Chairman	15/16
The FONASBA Quality Standard Jonathan C. Williams FICS, General Manager	17/18
Annual Meeting Report — Opatija 2008	19/20
External Relationships	21
Member Association Reports	23/53
Contact Details	54

INTRODUCTION
By the President of FONASBA
Tonny Dalhøj Paulsen



As shipping is so much a people business I have been fortunate to have had the opportunity during the first year of my Presidency to establish personal contact with a large number of people within our Member associations and by so doing have been able to raise the profile of FONASBA and to talk about the values we uphold and the activities we are undertaking.

In recent months I have attended a conference of CIANAM, FONASBA's regional committee for the Americas, in Mexico where I met representatives from the US, Central and South America, joined with our European Members and representatives of the European Commission at the 4th ECASBA seminar in Brussels in May and participated in the annual meetings of our Members in Sweden and France. I was also very honoured to represent FONASBA at the biennial Hellenic Shipbrokers Forum in Athens.

Everywhere I went reinforced my belief that the activities of FONASBA are well known within the Federation but less so outside, although we have made progress in recent years. We therefore have to continue to work to ensure FONASBA continues to raise its own profile and at the same time to attract more media and political attention to our sectors of the maritime industry. The development of a strategy for doing so is already on the agenda of the Executive Committee and partly covered by our decision to undertake production of a detailed, wide ranging and authoritative report on the current role and state of the agency industry. Parallel to this, we are also redefining and enhancing our general policy on news and media relations.

I am also pleased to report the successful introduction of the FONASBA Quality Standard which is now approved in eight countries and with around 150 companies having been accredited to date. Preparatory drafting work on appropriate criteria is also currently underway in a number of other Member associations.

Further expansion of the scope and coverage of our Members is still a high priority and I am proud to advise that the China Association of Shipping Agencies and Non-Vessel-Operating Common Carriers, (CASA) of Beijing, and the Philippines Ship Agents Association, of Manila, have recently announced their interest to join FONASBA and their official papers have recently been received. I am looking very much forward to have the privilege to confirm their Membership of our Federation at the annual meeting in Cape Town. Having two new Members in the Far East will certainly strengthen our presence in the region. Globally we are working with our four Regional Vice-Presidents (Africa, the Americas, Asia and Europe) in order to further expand FONASBA's Membership base.

Continued on page 6

Continued from page 5

FONASBA's European Committee ECASBA has further strengthened its position amongst the European maritime consulting organizations and our policy of quiet diplomacy, allied to detailed position papers, has certainly paid off in terms of our relationship with the Commission. With the election this year of a new European Parliament and Commission we will have to continue to maintain our presence in Brussels in order to ensure ECASBA retains its current position and this will entail much work for ECASBA, whilst at the same time continuing to provide the Commission with practical, balanced and reliable information on maritime related matters. A full report on our activities in Europe over the past year appears on pages 15 and 16.

On the international scene, FONASBA is active in IMO, particularly on the development of a standardised system for port waste management and we are also maintaining a close watch on the wide ranging and complex issue of vessel emissions and greenhouse gases. Whilst the ability of the agent or broker to effect change in this area is limited, we need to be aware of the issues in order that we can inform and assist our principals where and when required. We are also maintaining our very close and effective links with BIMCO, INTERTANKO, Intercargo and other international maritime organisations, as detailed on page 21.

As a result of the global crisis and its subsequent effect on the shipping industry, the first year of my Presidency has been challenging. I have, however, greatly benefited from and enjoyed the excellent support of, and co-operation with, our Members, the Executive Committee and the various working groups and I am looking very much forward to continuing to contribute to the further development of our association in my second year.

TONNY DALHØEJ PAULSEN
PRESIDENT

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



As the rest of this report reflects on the progress FONASBA has made over in the past twelve months, I am going to take advantage of it's 40th anniversary as an excellent opportunity to take a look back at how the Federation has developed since then.

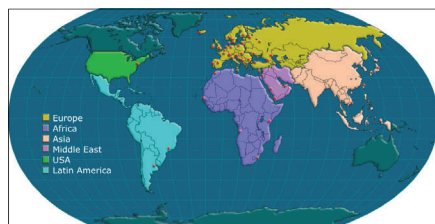
The Federation was inaugurated at the offices of the Institute of Chartered Shipbrokers in London on April 23rd 1969 and the founding Members were the national associations of Belgium, Denmark, Finland, France, Germany, Great Britain, Greece, Italy, the Netherlands, Norway and Sweden. The first President was Mr. E.C.J. Roberts, the Chairman of the Institute. By the next meeting, in November 1969, Portugal, South Africa and the USA had joined, to be followed in April 1970 by the Republic of Ireland and Morocco.

Although the FONASBA of 2009 is considerably different to that of 1969, a number of factors remain the same. Firstly, with the exception of Greece, all the founding and early Member associations are still playing an active role in the Federation. Secondly, FONASBA is again headquartered at the Institute of Chartered Shipbrokers, albeit that it now operates as a totally autonomous organisation, and thirdly, the basic rules of the association, for example the principle of one vote per member country, the role of the Executive Committee and the hosting of an Annual Meeting in a Member State, also remain unchanged.

In the intervening period, our membership has grown to nearly 40 countries, stretching around the world from northern Europe via Africa and the Americas to the Far East and Australasia. Our Associate and Candidate Members cover another ten countries and our Club Members are a very influential group of major maritime organisations whose contribution to, and support for, our work is vital to our success and of course greatly valued.

On the subject of influence, FONASBA's role as *the* representative body for the ship broking and ship agency sectors has also increased immensely over the last 40 years. Our accreditation as a consultative organisation within IMO and our position as one of the main negotiating bodies on maritime matters with the European Commission, to mention but two examples, confirm how far we have come, and are sources of great pride to everyone within the Federation.

Whilst raising a modest glass to our first 40 years at our anniversary meeting in Cape Town in October however, we must remain conscious that an immense amount of work requires to be done and that all manner of threats to the livelihood of our Members and our ability to carry out our principal's wishes in a professional manner are still out there. We cannot afford to rest on our laurels so once we are all back home, and the memories of another excellent meeting are little more than scraps of paper and some images on a memory stick, we will have to continue the task set for us by our predecessors in 1969, an continue to promote and protect the professions of shipbrokers and ship agents worldwide.



FONASBA MEMBERSHIP BY COUNTRY (at August 2009)

(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

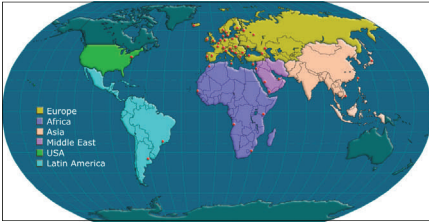
Japan	JAFSA, TOKYO
Mauritius (A)	MSCL Coraline, PORT LOUIS

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
Malta (A)	The Association of Ships Agents, VALETTA



FONASBA MEMBERSHIP BY COUNTRY (at August 2009)

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

EUROPE contd..

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

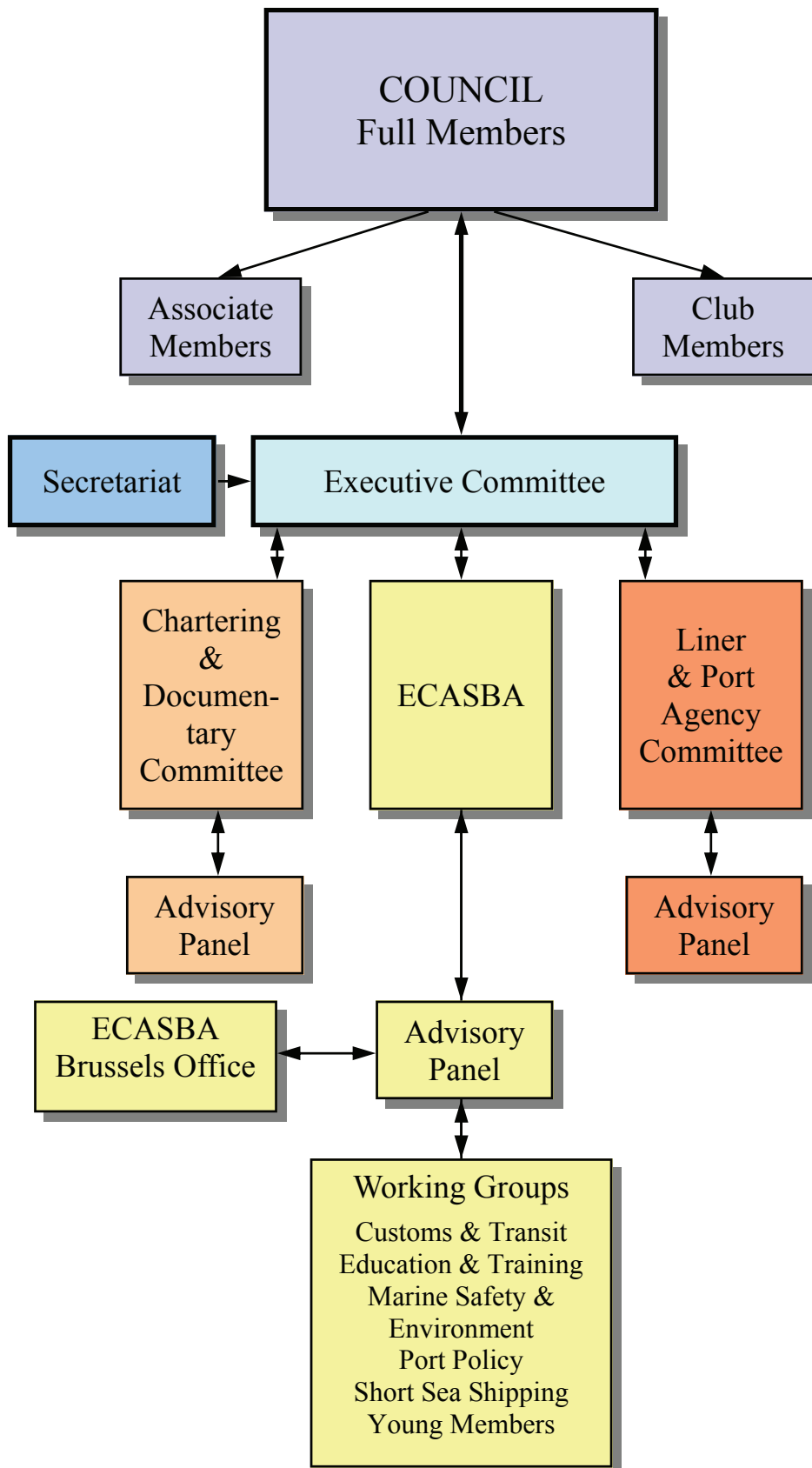
SOUTH AMERICA

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 and, through the Regional Vice Presidents, for developing FONASBA membership.

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 2008/10**PRESIDENT**

Tonny Dalhøj Paulsen, Denmark

EXECUTIVE VICE-PRESIDENT

Charles Génibrel, France

PRESIDENT DESIGNATE

Chris P. Papavassiliou, Cyprus

IMMEDIATE PAST PRESIDENT

Mario J.L. Froio, Brazil

VICE PRESIDENTS

Africa: Aziz Mantrach, Morocco

Americas: Patricio Campbell, Argentina

Asia: Takazo Iigaki, Japan

Europe: Gunnar J. Heinonen, Finland

COMMITTEE CHAIRMEN

Chartering & Documentary: Marygrace Collins, USA

ECASBA: Antonio Belmar da Costa, Portugal

Liner & Port Agency: Glen Gordon Findlay, Brazil

COMMITTEE VICE-CHAIRMEN

Chartering & Documentary: Botond Szalma, Hungary

ECASBA: John A. Food FICS, Great Britain

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 all illegal activities such as, but not limited to, maritime fraud and the trade in banned drugs and
6. agree to provide every assistance to the principal and the master of the vessel in ensuring, so far as possible and subject to the limits of responsibility of the agent, that the vessel's statutory obligations to appropriate and relevant national, regional and international authorities are discharged in an orderly and timely manner.

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,

THE FONASBA CODE OF CONDUCT contd./...

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,
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

***Antonio Belmar da Costa,
ECASBA Chairman***



It was a great honour for me to be elected Chairman of ECASBA at the Annual Meeting in Opatija last year and my grateful thanks go to my predecessor Gunnar Heinonen for passing the committee over to me in such excellent condition.

Although I was fortunate enough to have been Vice Chairman of ECASBA for the preceding two years, to be able to take charge of a committee that had already established excellent working relationships with the European Commission and the other European maritime industry organisations certainly made moving up to Chairman extremely easy. My thanks also go to my colleagues on the ECASBA Advisory Panel, my regular travelling companion and FONASBA/ECASBA General Manager Jonathan Williams, and our Brussels representative, Diego Teurelinx, for their ongoing support.

My first year as Chairman has to a significant extent been shaped by the knowledge that European parliamentary elections would be held in June 2009. That those elections would also bring with them changes in the Commission, through the subsequent election of a new college of Commissioners – some of whom may be of a very different political persuasion to the predecessors – led to a significant reduction in the volume of new initiatives emerging from the Commission in its last year.

Having said that, however, the Commission has certainly not sat still and work has continued on a number of ongoing projects and ECASBA has engaged fully with the relevant Commission Directorates-General on those that are of relevance to our members.

MARITIME TRANSPORT STRATEGY TO 2018

At the time of last year's report, we were awaiting the publication of the results of the Commission's wide ranging Maritime Policy consultation with industry, an undertaking that saw some 500 responses being received from interested bodies. The outcome was two separate documents, the "Strategic Goals and Recommendations for the EU's Maritime Transport Policy Until 2018" and the "Communication and Action Plan With a View To Establishing a European Maritime Transport Space without Barriers".

The Transport Policy paper included the Maritime Space initiative but also covered a wide range of other issues such as retaining maritime knowledge and expertise within the European Union, further enhancing the quality of the European shipping industry, promoting safety and security as well as continuing the actions to exploit the full potential of short sea shipping.

ECASBA responded in some considerable detail to the Communication. Whilst fully supporting its overall aims of ensuring the European maritime industry remains effective, efficient and able to compete on a global basis, we raised a number of concerns including, for example, the almost exclusive concentration on seafarers in relation to retaining maritime knowledge and expertise within the Community. It is clear that there are far more people employed in the maritime industry ashore than at sea and that seagoing knowledge is not a prerequisite for many of those shore-based jobs. ECASBA has therefore reiterated its call for action to support the entire maritime sector, not just seafarers.

Quality Shipping is also vital for Europe's ability to compete but again we have argued that the concept should be broadened to cover all sectors of the industry, rather than also being concentrated on ship operations. The opportunity to promote the FONASBA Quality Standard in this context was not overlooked.

Action to enhance maritime safety and security was supported, but not at the expense of additional bureaucracy. A commitment that all European member states should enact all relevant IMO instruments by 2012 was particularly well-received as this will ensure the adoption and use of the IMO-FAL documents across the Union, and so streamline the job of the agent. ECASBA also repeated its concerns about Europe having its own seat at IMO, and we understand this ambition has since been watered down in order to preserve individual national representation.

Exploiting the full potential of Short Sea Shipping is something ECASBA has supported for many years and we very much hope that tangible progress may soon be evident, particularly in relation to the Maritime Space concept and in the internalisation of external costs, a process aimed at ensuring each transport mode covers its full infrastructure and environmental costs, which should also boost short sea shipping. ECASBA has also called once again for a radical simplification of the support schemes for short sea shipping, especially the incredibly complex Marco Polo programme.

Continued on page 16

ANOTHER YEAR OF POSITIVE PROGRESS IN EUROPE

Continued from page 15

COMMON EUROPEAN MARITIME TRANSPORT SPACE without BARRIERS

The name of this initiative changes every time the Commission refers to it but we think the version above is still current!

As stated in Gunnar's report last year, broadly speaking this is an initiative designed to allow intra-European cargo to be moved by sea with the same simplified reporting and administrative compliance burden as it does by road or rail. In its Communication, however, the Commission has widened its coverage to include a wide-ranging project to overhaul the entire regime for ships' reporting and compliance with statutory regulations, all of which is extremely complex, cumbersome and time consuming. Initially mooted some five years ago, and fully supported by ECASBA since then, progress unfortunately stalled due to opposition from customs authorities in some Member States whose primary aim appears to be job retention, not trade facilitation. That DG-TREN has come out so strongly in favour of the project may owe something to inter-service rivalry between TREN and the Customs directorate DG-TAXUD but if it gets the project moving forward we are all for it.

ECASBA's support for the initiative is such that we were invited to make a presentation on it at the main European Maritime Day event in Rome in May this year. During his presentation, General Manager Jonathan Williams also took the opportunity of introducing the concept of the "agent as port single window". The Communication called for the establishment of national and port single windows for the exchange of all relevant information between ship and shore and this is a task we believe our agent members in the ports are perfectly well suited to undertake. We are cautiously optimistic that our proposal is being considered within the Commission and we will continue promote it as the Maritime Space project goes forward.

CUSTOMS ACTION AGAINST AGENTS

The Customs regulations in a number of European Member States allow the national customs authority to take direct action against the port agent in cases of mis-declaration of cargo, in spite of the international convention that the agent is entitled to rely on the description of the cargo provided by the shipowner. Earlier this year, therefore, we raised this issue with DG-TAXUD and although the initial responses were not encouraging – apparently no-one in TAXUD seems ready to look at the issue – we will continue to press for action to be taken.

CUSTOMS DEVELOPMENTS

DG-TAXUD continues to make slow but steady progress on the Modernised Customs Code and the ongoing development of e-customs and ECASBA is monitoring the situation.

ECASBA SEMINAR 2009

Our fourth seminar was held in Brussels in May, again affording delegates the opportunity to meet with senior Commission staff and representatives of other European maritime bodies and discuss at length the issues confronting us all. It is encouraging that this event has now firmly established itself in the Brussels event calendar, as well as the diaries of our regular speakers and our member associations. Our fifth event, to be held in May 2010, will focus on the priorities for the incoming Commission and this should prove extremely interesting and informative.

So, ECASBA moves forward into another year well-prepared for the challenges that we will face. As I wrote at the start of this article, the new Commissioners will be elected later this year and it is possible that the general policy direction in relation to the maritime industry may be different to what has gone before. Whatever emerges, however, I am certain ECASBA will continue to be well placed to ensure that the interests of our members are promoted and protected to the best of our abilities.

In conclusion I would like to thank once again my colleagues on the Advisory Panel, the coordinators and members of the Working Groups and the FONASBA Executive Committee for their continuing support.

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.

Introduced at FONASBA's Buenos Aires Annual Meeting in 2007, the Quality Standard is now gaining support amongst the Membership and this year another five associations were accredited, bringing the total to eight, that is:

Argentina, Australia, Denmark, Great Britain, Slovenia, Spain, Sweden and the USA

Within those countries a total of more than 150 companies are covered by the Standard and whilst in some countries the number of companies may appear small, the coverage of the national agency market they enjoy is considerably greater. Great Britain and the US are cases in point.

At the time of writing a number of other FONASBA Member associations are in the process of developing draft criteria for accreditation and it is expected that the coverage in Europe and South America will be expanded in the near future.

FONASBA is pursuing a twin-track approach to promoting the Standard, and as reported last year this is being progressed both by encouraging member associations to secure accreditation and also by promoting the Standard to the global maritime community. The support given by Intercargo, INTERTANKO and Lloyds List immediately after the launch was extremely valuable in enhancing awareness of the Standard and FONASBA is working with other organisations in the maritime industry to further promote knowledge of the Standard and its aims and objectives.

In addition to promoting the Standard within the maritime community, FONASBA is also endeavouring to secure the support and endorsement of international and regional legislators. As reported on pages 15 and 16, FONASBA's European committee ECASBA has initiated discussions with the European Commission, DG-TREN, with a view to companies within ECASBA Member associations taking on the role of port single window under the Common European Maritime Transport Space without Barriers concept and ECASBA anticipates that for this to be acceptable to the Commission some form of additional evidence of relevant regulation and control (over and above the company just being a member of the association) will be required.

Continued on page 18

DEVELOPING THE FONASBA QUALITY STANDARD

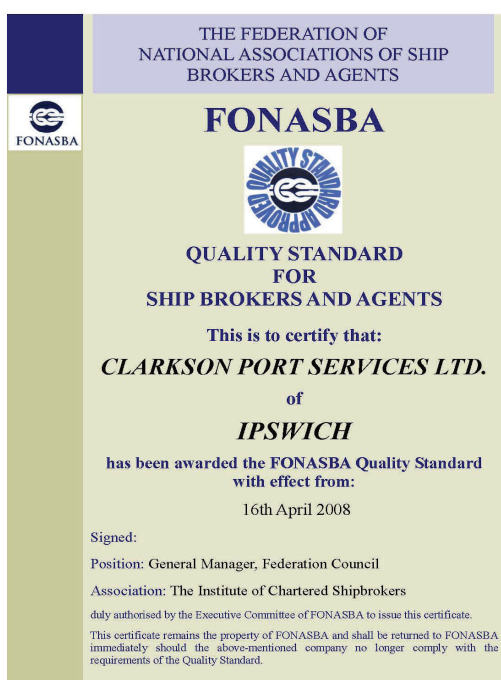
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Clearly, obtaining and maintaining the FONASBA Quality Standard is the most appropriate means of providing this additional evidence and as it is relevant to the obligations and liabilities of the agency operation, already in use and supported within the maritime community, ECASBA will be offering it as the ideal solution should the Commission decide to support the “agent as port single window” concept.

Irrespective of whether the Quality Standard is a factor in any specific discussions with the European Commission, ECASBA will continue to seek overall endorsement of the project from Brussels. In its response to the Maritime Transport Strategy to 2018 paper, ECASBA drew the attention of the Commission to the Standard as part of its endeavours to have the Quality Shipping campaign expanded to all sectors of the maritime industry. Unfortunately, just before he was reassigned to Justice late last year, ECASBA introduced the Standard to former Transport Commissioner Jacques Barrot, with whom it enjoyed an excellent relationship. Since his departure, and that of his Cabinet, there has been little progress in this regard and so ECASBA will be taking the issue up with the new Transport Commissioner after his or her election.

At the national level, a number of associations are using the FONASBA Standard in discussions with their maritime authorities as a means of differentiating between those agency companies that are committed to providing a high level of professional service to their principals and those that do not. In such cases FONASBA is ready and able to provide assistance and support to those associations as and when required.

Clearly there remains much work to be done before the Standard becomes universally accepted as *the* gold standard for the ship agency profession but FONASBA remains committed to supporting the Standard and to promoting its use amongst the Membership. In this regard, a special event is being held at the Annual Meeting in Cape Town during which associations that have already secured the Standard can pass on their views and experiences to those that have not yet decided to undertake the accreditation process.



An example of the recently introduced Quality Standard certificate. One original certificate is issued to each accredited company in the name of its head office and copies may be issued to each branch office

FONASBA ANNUAL MEETING 2008

In keeping with the tradition of rotating Annual Meetings between Europe and the rest of the world, the 2008 Annual Meeting moved back from South America to Europe and the picturesque Austro-Hungarian empire resort town of Opatija on Croatia's Istrian peninsula, where a total of 107 delegates and partners attended.

The meeting opened with a Welcome Reception overlooking the Adriatic, during which delegates and partners were entertained to a unique form of a cappella singing indigenous to the region.

The work programme began with the **ECASBA Plenary Meeting**, the centrepiece of which was the now traditional update on European developments over the previous twelve months plus predictions for those issues that are expected to be progressed by the Commission in the coming months.

Under Member's Issues, the meeting discussed the continuing need for tangible and effective support from the European Commission for the European Short Sea Network (ESN) of promotion centres. ECASBA has been a regular and vocal critic of the Commission's refusal to fund the ongoing operation of these centres, which we believe significantly degrades the effectiveness of their efforts to encourage the use of short sea shipping as an alternative to road transport.

Concern was also expressed as to the ability of the Commission to provide effective and appropriate support for driving forward modal shift across the Community. The inflexibility and "one size fits all" nature of the support programmes, and in particular the "Marco Polo" initiative, is not necessarily appropriate in all Member States. It was therefore proposed that a series of national support schemes be introduced.

With a new Executive Committee to be elected at the Council Meeting, ECASBA's Finnish Chairman Gunnar J. Heinonen stepped down at the end of the meeting after six years in office. He thanked his colleagues for their support and encouragement in making ECASBA one of the main consultative bodies within the European maritime sector and pledged his support to his nominated successor, ECASBA Vice Chairman Antonio Belmar da Costa.

Immediately after the ECASBA Plenary Meeting, association secretaries met to discuss implementation of the FONASBA Quality Standard. The meeting was extremely well attended and an open and enthusiastic debate took place.

Next on the programme was the **Liner & Port Agency Committee Plenary Meeting** and this opened with reports from FONASBA's regional Range Committees covering the Americas (CIANAM), Asia, the Nordic countries and the Mediterranean and Black Sea region (MABSA). From the reports it is clear there are a number of issues specific to each region and the committees agreed to take these forward, with support from FONASBA, in the coming months.

One of the main topics of the meeting was a discussion on the impact of the DA-Desk initiative on the agency profession in general, and FONASBA Member companies in particular. Both the FONASBA Secretariat and representatives of ASBA, its Member in the United States, had met previously with DA-Desk and a number of concerns had been raised. These included the frequent need to advise DA-Desk of operational decisions that had already been agreed with the principal, the implications, legal and otherwise, of having another party in the chain of responsibility between the agent and principal and the possible harmful effects of DA-Desk misusing information it had collected on agents as a result of its activities.

These concerns were shared by the delegates present and it was therefore agreed that an internal task force, led by Glen Gordon Findlay of Brazil, be set up to develop FONASBA's response and forward action plan.

The Quality Standard is a logical component of the L&PA's work programme and the meeting was updated on progress in introducing the Standard across the membership.

Continued on page 20

FONASBA ANNUAL MEETING 2008 contd./...

Continued from page 19

Although strictly a European initiative, full the application of Community competition law to the liner trades was felt to be of such importance to the international community that it was discussed in full in the L&PA meeting. The anticipated impact on FONASBA's activities was also discussed and an anti-trust and competition policy was drawn up after the meeting and circulated to all members. The meeting was also updated on progress towards the establishment within IMO of an international regime for the collection and disposal of ship-generated waste. As with ECASBA, the Plenary Meeting ended with the Chairman, in this case Charles Génibrel of France, stepping down from the committee.

The final Plenary Meeting was that of the **Chartering & Documentary Committee**, headed for the last time by Chairman Grete Noer of Norway, who had held the Chair since 2002. The agenda opened with a series of market reports covering the dry bulk, tanker, gas, container and cruise sectors. With the economic downturn starting to emerge, most of the reports contrasted the high rates and increasing demand of previous years with the uncertainty overhanging any future activity.

Andrew Jamieson, Claims Director of FONASBA Club Member ITIC, the intermediary insurer, gave another entertaining but thought-provoking presentation on the issues causing most concern to the broking community. This year they included the perennial problem of communication by e-mail, the need to have robust procedures in place for handling demurrage claims and the increasing practice of requiring brokers to sign principals' terms and conditions.

The meeting concluded with reports from the BIMCO and INTERTANKO Documentary Committees.

The **Council Meeting** included the election of a new President, Tonny D. Paulsen of Denmark, and Executive Committee (for details see page 11) and thus saw the retirement of Mrs. Noer and Immediate Past President Philip Wood, who received a vote of thanks from the President and delegates. After a ballot the 2010 Annual Meeting was awarded to the Bulgarian association, BASBA, which proposed holding the meeting in Varna. Finally, all delegates gave a standing ovation to Francois Le Bars, FONASBA's oldest active member, and Gunnar J. Heinonen on their election to Honorary Membership.

The concluding Gala Dinner took place in the Austro-Hungarian splendour of Opatija's Imperial Hotel, one of the oldest in the resort.



EXTERNAL RELATIONS: COOPERATION WITH OTHER INDUSTRY BODIES

With the global maritime industry being multi-faceted, as well as covering a multitude of disciplines, it is vital to ensure there is cooperation across all sectors. In order to further that aim, FONASBA continues to develop and maintain close relations with external organisations where these are in the best interests of both the Membership and the maritime industry as a whole. These relationships are greatly valued by FONASBA and play a central role in its activities.

At the international level, the Federation maintains consultative status with the International Maritime Organisation (IMO), the World Customs Organisation (WCO), the United Nations Conference on Trade and Development (UNCTAD) and the United Nations Commission on International Trade Law (UNCITRAL). Recently, FONASBA has contributed to the work of the Port Reception Facilities sub-committee of the Marine Environmental Protection Committee within IMO and made submissions to UNCITRAL — and in the early stages the Comité Maritime Internationale — in the development of the Convention on Multimodal Transport Liability, now known as the Rotterdam Rules.

Regionally, FONASBA's European committee, ECASBA, is one of the primary consultative organisations on maritime affairs for the European Commission and as reported on pages 15/16, the ECASBA Chairman and Secretariat, supported by the working groups on customs and transit, marine safety and the environment, port policy and short sea shipping, engage in regular and detailed dialogue with the relevant Commission units to ensure the views of our Members are taken into consideration when developing maritime policy. For the most part, ECASBA works with DG-TREN (transport and energy) DG-TAXUD (taxation and customs union) and DG-MARE (maritime affairs and fisheries) and has developed close working relationships with senior staff in all the relevant departments. ECASBA is also a member of the European Maritime Industries Forum.

In the Americas, FONASBA Member associations in Argentina, Brazil, Mexico, Peru, the USA and Uruguay are the driving force behind CIANAM, the ten member Inter-American agents association. The permanent secretariat of CIANAM is based in FONASBA's Argentine Member association Centro de Navegacion and the rotating presidency is currently held by FONASBA's Peruvian association APAM.

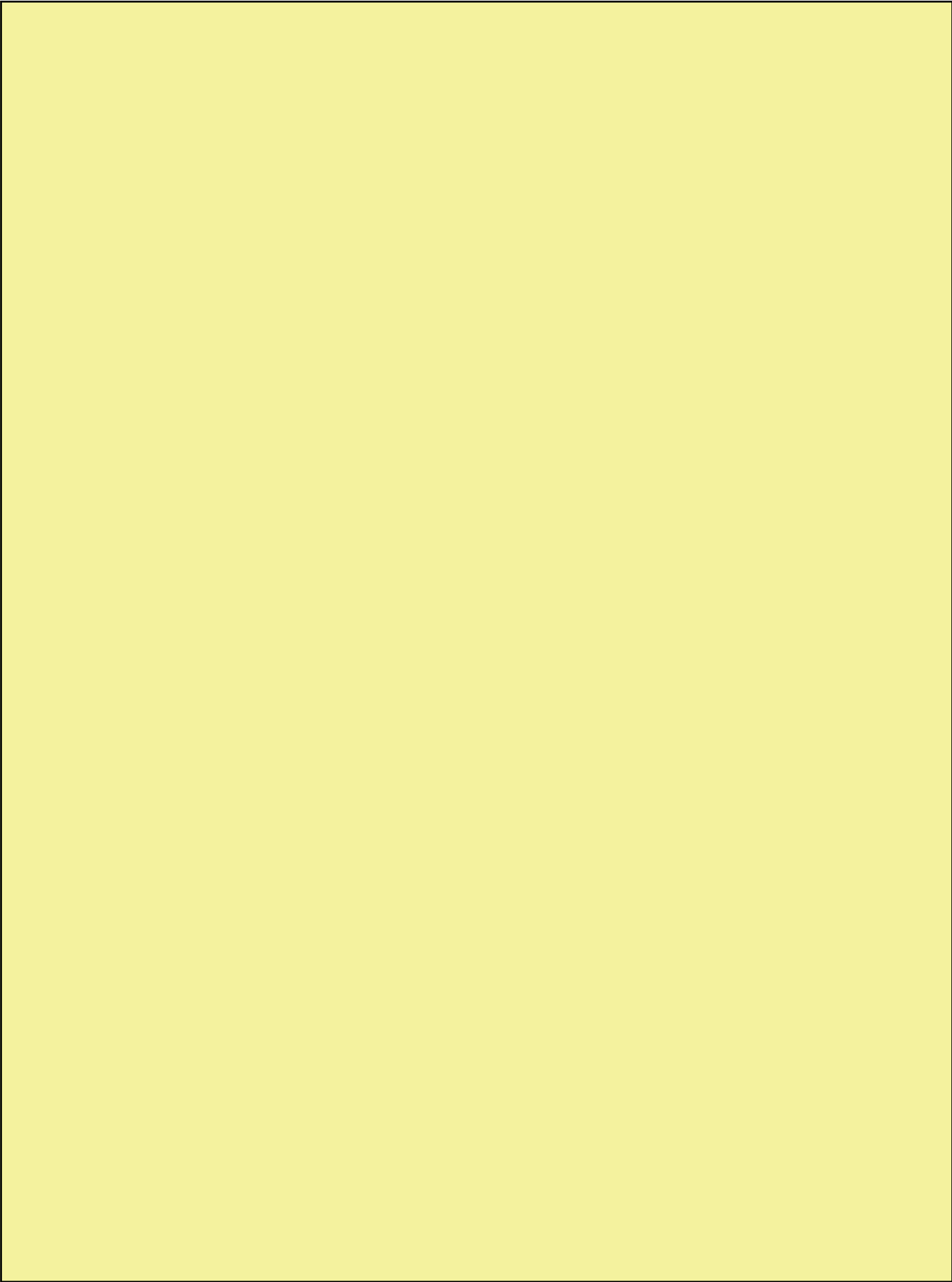
Within individual member states, FONASBA associations work very closely with their national authorities and the Federation also assists and supports those associations through the provision of information on international standards and methods of operation, the application of international protocols and conventions and through the collection of appropriate data from other Member associations to support a particular viewpoint.

FONASBA also cooperates closely with relevant industry organisations, including the Baltic Exchange, BIMCO, INTERTANKO and industry insurer ITIC, - all of which are Club members of FONASBA and with whom FONASBA enjoys reciprocal membership rights - as well as Intercargo and in Europe with ECSA, representing EU shipowners, ESPO and FEPORT, representing the port industry and CLECAT and ESC representing freight forwarders and shippers.

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*

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Centro de Navegación

Population:	40,913,584
GDP 2007/8:	US\$ 575.6 Billion
Total Volume of Exports (2007/8):	US\$ 73 Billion
Total Volume of Imports (2007/8):	US\$ 59.9 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 high volume notwithstanding a farmers conflict that decreased exports in 20% from last year.. The manufacture of agriculture products are those of higher participation within the Argentine exports (33%), followed by the manufacture of industrial goods (32%), primary products (19%) and oil and energy (16%). In regard to containers, our country expects to move about 1,2 million TEU this year. World Crisis had an impact in Container trade of about 30% less TEU compared to 2008 volume.

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. 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. Oil: La Plata, Dock Sud, Campana, Bahía Blanca. General Cargo: Zárate, Campana, Dock Sud. Cruise Activities, Buenos Aires, Puerto Madryn and Ushuaia. We expect an increase of 20 % in Cruise traffic for the 2009-2010 Season.

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.-. This year following a strong conflict between Farmers and Government. investment has been reduced. On the contrary, this year we expect an increase of 20 % on the Cruise Vessels. from last year. New Container Terminal in La Plata Port (Tecplata S.A.) started its construction, it is expected a reduction of costs and less transit time for Container Vessels.

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 Presidency in held by Peruvian Association. This year the annual meeting of CIANAM was held in Mexico City..

Activities in our association.

Our education institute “CENTRO DE ESTUDIOS DEL COMERCIO MARÍTIMO INTERNACIONAL” continues its development and another group of students have obtained their degree. At the end of 2008 we 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. We have certified the first five Maritime Agencies with the FONASBA QUALITY STANDARD from Argentina. We expect that there will be more in the near future as we encourage members to apply for it.

Miscellaneous.

In 2010 in our country we will celebrate our 200th Anniversary of Argentina as a Nation and we expect a lot of events. We will also be celebrating the 110th anniversary of our association.

Member Association Report — AUSTRALIA

Association: *Shipping Australia Ltd.*

Membership: 40

Contact: *Mr. Llew Russell*

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Population:	21,262,641
GDP 2007/8:	US\$ 800.5 Billion
Total Volume of Exports (2007/8):	US\$ 178.9 Billion
Total Volume of Imports (2007/8):	US\$ 1587.2 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

Given the global financial crisis, Shipping Australia, in common with other FONASBA members, has been trying to reduce port costs and in the year under review SAL has increased its lobbying efforts with State and Federal Governments.

The Australian Government continues to consider recommendations of a Parliamentary Committee regarding a new Australian coastal shipping policy. SAL supports a viable and internationally competitive Australian shipping industry but is concerned to ensure that the main policies pursued add rather than detract from Australia's international competitiveness.

More recently, one of the issues that has arisen is the regulation by the Government that foreign vessels carrying coastal cargo around Australia under permit must adhere to Australian industrial award conditions. This is the subject of ongoing discussions and it is hoped that an exception could be made for vessels that carry such cargo incidental to an international voyage.

Another issue has been the unfortunate accident on 11 March off Brisbane where the vessel *Pacific Adventurer* lost 31 containers overboard which was subsequently found had holed both the starboard and port bunker tanks and subsequently around 220 tonnes of oil washed up on Queensland's beaches. The shipping company sought to rely on the Limitation of Liability for Maritime Claims Convention and offered to pay above that but could not afford to pay all the clean up costs. The Australian Government is presently considering ways to recover the difference.

Shipping Australia has sought to be more proactive and has introduced an internet based introduction to shipping course and has been working with Tradegate which promotes IT solutions in the transport and logistics industries to develop a community port based data system, hopefully on a national basis.

Furthermore a forgotten sector of the industry in Australia, break bulk shipping has been the subject of a study carried out by SAL in order to raise its profile and encourage ports and governments to consider the particular challenges they are facing.

SAL is being consulted on the reviews of the Maritime Crew Visa as it applies to foreign seaman visiting Australia and the Maritime Security Identification Card which is required to transit or access security regulated areas in ports in Australia. There has also been a lot of work carried out on the ways of enhancing security in the cruise industry and SAL is represented on a high level government group examining the possible location of new cruise terminals in Sydney Harbour.

Shipping Australia continues to work closely with all the border agencies to hopefully reduce the costs that have to be borne by the shipping industry. The possibility of port based data community systems including a national system for the reporting of dangerous goods manifests and improving IT communication with empty container parks is an exciting future development.

The New South Wales Government has been working to improve the sea/land interface at Port Botany in Sydney and has proposed a truck congestion charge for accessing the terminals during peak periods. It is possible other States will replicate that policy if it proves to be successful in Sydney. Finally, SAL has been discussing with Newcastle, a major coal loading port, a possible new vessel arrival system to reduce congestion at the port.

Member Association Report — BELGIUM

Association: *NAVES vzw*

Membership: *141*

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website:



Population: 10,414,336

GDP 2007/8: US\$ 390.5 Billion

Total Volume of Exports (2007/8): US\$ 372.9 Billion

Total Volume of Imports (2007/8): US\$ 375.2 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 ship agents and brokers. Five organizations, located at the five seaports Antwerp, Zeebruges, Ghent, Ostend-Newport and Brussels represent in total 139 agencies, which means about 90% of the market. 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 of our organizations 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.

Although volumes started to drop in the autumn, 2008 still was a record year for the Belgian ports. On over 34.000 vessels, ports handled 267 million tons of cargo, of which 189 million through the port of Antwerp, which still is the second largest port of Europe. Container volumes nearly reached 11 million TEU, mainly through Antwerp and Zeebrugge, the latter making a nice leap in throughput.

Dry bulk, which mainly is import, increased to 49 million tons (+ 8,8%) and liquid bulk to a very same 49 million tons (+ 2%). RORO and general cargo/breakbulk already showed signs of the worldwide economic crisis and suffered a slight drop.

The third widening and deepening program of the river Scheldt hasn't been finished yet, but as from the spring of 2009, Antwerp could enjoy the regular arrival of the latest generation of ultra large container vessels of 14.500 TEU. This means that, after Zeebruges showing the way, also the port of Antwerp is perfectly in shape to cope with future demands.

In the end of 2008 and during the first semester of 2009 Belgian ports severely suffered from the impact of the financial and economic crisis on maritime industry. In container trade Zeebrugge and in a lesser way Antwerp succeeded to limit the pain as they were or became West-European hub ports for several main container lines. First signs of recovery were noticeable on certain trades this summer, but it seems that structural improvement will take more time.

In the eye of this storm, our organization proceeded on projects as giving support to the reworking of Belgian Maritime law, Customs law and organization and all kind of local procedures and regulations. And in a time of less employment in the ports, we still firmly got on with the promotion action for our agency sector, specially focused on the last year high school students who have to make their choice for further study and career. We herewith hope we will enjoy the arrival of enough and well educated youngsters when the economy really takes on again...

Member Association Report — BRAZIL

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

Membership: *12 associations, 155 members*

Contact: *Mr. André. Zanin*

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Population:	198,000.000
GDP 2007/8:	US\$ 1.574 Trillion
Total Volume of Exports (2007/8):	US\$ 200.0 Billion
Total Volume of Imports (2006/7):	US\$ 176.0 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, meat, ethanol and vehicles

FENAMAR has continued to make progress in a number of areas, the most important ones being:

- FENAMAR has been developing since October 2007 a software, ordered by Brazilian Navy to manage and control vessels calls at all Brazilian Ports.
- Brazilian Shipping Agent Day – On October 2008, a Federal Law was signed by The Brazilian Presidency institutionalizing the date of June 23rd, as The National Ship Agent Day in Brazil. This year, the first celebration was promoted by the local Harbour Master at each Brazilian port, together with FENAMAR's State Associations.
- FENAMAR Quality Label – During the first semester of 2009 some Shipping Agencies Affiliated were awarded the FENAMAR Quality Label. Also, FENAMAR was very proud to have its Quality Label approved by FONASBA, meaning that Brazilian Shipping Agencies certified by FENAMAR will also be allowed to use FONASBA Quality Label as well.
- FENAMAR in 2009 was officially invited and participated in a Brazilian Government Mission to China, Hong Kong and Singapore to discuss matters related to Ports infra-structure and Logistics.
- Since the beginning of 2009, FENAMAR was invited by Government and has been participating in the development of a new project, named "Paperless Port". This project aims at setting a so-called "Portal" to integrate all the information transmitted by the Ship Agents. Nowadays in Brazil the same information is sent many times to different Authorities offices in different formats.
- With regards to Brazilian Federal Government, FENAMAR has been invited to participate and voice the opinion of the Shipping Agency at the most important Forums, discussing Port related Business and Integrated Transport Logistics, to help the implementation of the changes badly needed by our Ports.
- Finally, FENAMAR continues to work very hard and has been successful to modify some important new Law projects, being discussed by Federal Government and the Congress, such as Cruise Vessels Tax Regulation, Special Visa for Foreign Shipping Technicians (Immigration Law), Import Cargo Retainability by Ship Owners (Delivery order), among others.

Member Association Report — BULGARIA

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

Membership: 52

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Population:	7,204,687
GDP 2007/8:	US\$ 51.99 Billion
Total Volume of Exports (2007/8):	US\$ 18.58 Billion
Total Volume of Imports (2007/8):	US\$ 28.65 Billion
Principal Commodities Imported:	Machinery and equipment, metals, ores, chemicals and plastics, fuels, minerals and raw materials
Principal Commodities Exported:	Clothing, footwear, iron and steel, machinery and equipment, fuels

BASBA has 51 members. The association comprises a liner agents section, a brokers section and a Danube river section within its structure. Liner agent members represent all major lines operating in Bulgaria, while broker members represent some of the biggest industrial (chemical, extracting and energy) companies and some of the largest ship owners, in the region.

BASBA members act for about 70 % of ships calling at the ports of Varna region, about 90 % of ships calling at Danube Ports of Bulgaria, and also hold a considerable part of the market of agent services in the Port of Bourgas.

The Liner agents section has continued its work on providing mutual standards and practices and in the last year.

BASBA is still working to attain the statute of branch organisation, so that we may influence more directly on the diverse work of the administrations. So far there is no progress but with the new administration in place we have hopes for development. We have progress on the project of enhancing the border control procedures for inward/outward clearance and implementing a Port Community System. After last August and the workshop we made the administrations decided to back up a proposed electronic system for inward/outward clearance. Since then a team from the Maritime administration which later was transferred to the Port Infrastructure Company started the pilot project and with the cooperation of BASBA, the port agents and the authorities now we are in the process of testing their product. There are still some difficulties but the progress is considerable. In spite of this example of close co-operation between BASBA the authorities, overall dialogue between industry and the government continued to be poor.

There was some legislative changes before the government changed in particular the rules for ship calls in Bulgarian sea ports. Despite our protests and remarks the rules were accepted before further developing and without concern of the consequences to trade. Now the problems start to arise and we will remind the authorities again of the remarks and notes we made to the draft of the document.

BASBA participated in the SAR conference in October 2008.

BASBA had organized one seminar concerning the changes in the customs practices concerning the implementations of Regulations 648/2005, 1875/2006, 414/2009 and 312/2009.

The Marine Cluster Bulgaria of which BASBA has been one of the co-founders, finished the project which has won and the logistics training center is now functioning in the Technical University in Varna. The latter was a major part in the project since it is the first training center of the sort in Bulgaria and BASBA provided help for developing the algorithm of the software for it.

The building of the new container terminals in Bourgas and Varna has not yet begun. In the meantime BASBA backed up the management of Port of Varna with a project of building a small container terminal which could be build before the bridge above the canal in short time. That way Port of Varna could accept bigger ships with high draught requirements and handle transshipment cargo. The bridge puts a limit on air draught and even when the new big container terminals are completed Varna will be able to handle only the feeder vessels.

The reputation of BASBA in international scale is at good level. Also we are very grateful for the discussions of problems between the members of FONASBA. Prove is the active participation in the discussions about important issues with FONASBA and ECASBA members 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

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Population:	4,490,000
GDP 2007/8:	US\$ 73.36 Billion
Total Volume of Exports (2007/8):	US\$ 12.36 Billion
Total Volume of Imports (2007/8):	US\$ 25.84 Billion
Principal Commodities Imported:	Consumer goods, coal, iron ore, steel products
Principal Commodities Exported:	Ships and ships equipment, machinery, textiles, chemicals, foodstuffs

Rijeka is working actively to strengthen its position as a competitive gateway to Europe at a time when the Northern Adriatic ports are experiencing strong growth in containerized traffic from the Far East to Central Europe. Over the past five years, containerized cargo through Rijeka grew from a modest 15,000 TEUs to 175,000 TEUs. The new Master plan Update foresees growth to over 600,000 TEUs by 2020, requiring additional capacity to be added rapidly.

The modernization of the port system in Ploče is expected to more than triple the annual traffic volume – from 2 million tons in 2004, to about 7.2 million tons in 2011. Croatia's government hopes it will boost the economic development of Southern Dalmatia, and benefit the region as a whole in the process.

At Zadar a new RO-RO facility to be built which will link 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.

There is in progress investments into new port facilities at the passenger ports at Sibenik, Split and Dubrovnik.

The Association of Ship Brokers & Agents of Croatia was honoured to be the host association for the 2008. FONASBA Annual Meeting which was held in Opatija in October 2008.

The main goals of the Association in the short term are:

- to develop and co-ordinate the activity of Shipbrokers and Agents,
- active participation in the discussion and working groups with FONASBA and ECASBA,
- close cooperation with the Authorities in order to actively participate into new legislative process which is related with the shipping industry and agency business,
- organizing seminars and conferences for the members with a view to promote information flow within the various segments of the shipping industry and to extend expertise and education on the particular matters important for the agents
- organizing event "Award for the best Agent" in order to promote professionalism and a high level of services to Principals, but also to promote maritime agents profession to the public.

Member Association Report — CYPRUS

Association: *The Cyprus Shipping Association*

Membership: 35

Contact: *Mr. E. Kouzapas*

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website: www.csa-cy.org



Population:	800,000
GDP 2007/8	US\$ 22.7 Billion
Total Volume of Exports 2007/8:	US\$ 1.7 Billion
Total Volume of Imports 2007/8:	US\$ 9.9 Billion
Principal Commodities Imported:	Consumer goods, petroleum and lubricants, intermediate goods, machinery, transport equipment, fertilisers and chemicals
Principal Commodities Exported:	Agricultural and light industrial products, pharmaceuticals, cement and minerals

The Cyprus Shipping Association (CSA) remains actively interested and involved, as the private sector's representative, in all matters concerning the Cyprus Port Industry and related activities.

1. Upgrading and expansion of Limassol Port: Dredging of the Limassol Container Terminal to 16 m. was completed in March 2009. The two Panamax cranes have not yet been transferred from Larnaca Port. Awaiting the launching of international tenders for the 500 m. container quay extension, for a new 60 bollard tugboat, for two Post-Panamax gantries and the construction of the new passenger terminal.

2. The other Cyprus Ports: The Government and a strategic investor are negotiating the final terms for the transformation of the Larnaca Port and Marina into a modern Passenger Hub under the FBOT system. In addition, the Government has launched a feasibility study for the construction of an Industrial Port at Vassiliko Bay.

3. Upgrading of the Port and Customs Electronic Systems: Both the Cyprus Customs and the Cyprus Ports Authority have announced the upgrading of their respective electronic systems in view of the introduction of the risk assessment analysis of goods through EU Ports as from 2011.

4. Authorized Economic Operator (AEO): Despite the relative slow down in the implementation of AEO throughout the EU, some shipowners still request their local agents to obtain the AEO certificate. The CSA, through its consultants, assists member agents with their preparation to become AEO.

5. Security Charge at Cyprus Ports: The Government has authorized the CPA to proceed with the implementation of a security charge. It is anticipated that by the end of 2009 the security charge will be introduced in Cyprus Ports.

6. Developments in connection with the new labour force at Cyprus Ports: In September 2008 the scheme for the renewal of the Limassol and Larnaca port labour was activated. As expected, the transition was peaceful and the results of utilizing a young and well trained labour force were immediate. It was estimated that the productivity of Limassol port increased by 15% in the first six months. The CSA's affiliate, United Stevedoring Company, manages and coordinates the port labour with special emphasis on training and discipline.

7. "Safety and Health at the work place": The CSA has contracted the services of consultants who undertook the training of the agencies' staff and the port labour force according to the provisions of the E.U. Directive. A risk assessment analysis at the work place (office and port) has been prepared for each agency member of the CSA.

8. Shortlanded goods at Cyprus Ports: The dispute between our Association and the Cyprus Customs concerning the responsibility of the ship's agent continues. Regrettably, the TAXUD's reply to our direct appeal was negative upholding the Cyprus Customs view. The CSA now follows with interest ECASBA's efforts with TAXUD to resolve this serious problem affecting many ECASBA members.

9. Education: The CSA organizes educational seminars and encourages its members to enrol new employees in the course 'Understanding Shipping' provided by the Cyprus Branch of ICS since 2000.

Member Association Report — DENMARK

Association: *The Danish Shipbrokers Association*

Membership: 148

Contact: *Mr. A. Houtved FICS*

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Population:	5,500,510
GDP 2007/8:	US\$ 342.9 Billion
Total Volume of Exports (2007/8):	US\$ 119.5 Billion
Total Volume of Imports (2007/8):	US\$ 120.7 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

Denmark's economy began slowing in early 2007 and GDP fell 1.2 percent in 2008 and is expected to fall another 3.3 percent in 2009. The forecast for 2010 is a recovery of 1 percent.

General Shipping Climate

All sectors are under severe pressure and contracts are cancelled, there is a strong focus on cost cutting and some are made redundant. Less cargo is carried by ship and more newbuildings are delivered. With limited cargo and over-supply of tonnage rates are often below break-even. Especially the container trade is losing millions of \$ every day. Some shipping companies have been forced to close down. Danish shipping companies control more than 55 mio. DWT and had as per July 2009 ordered 333 newbuildings totalling 14 mio. DWT and a value of US\$ 15.5 billions. 7 % of the world tonnage is operated from Denmark and Danish shipping companies arrange 10 % of the world transportation.

Ports and Infrastructure

Heavy investments are being made in rails and roads whereas this unfortunately is not the case when it comes to the ports. The commercial Port Management and the shipping companies can agree to protect and develop the port in order to cope with the increases in the amount of goods to be carried to and from Denmark. The Danish ports are generally owned and controlled by the local municipality and unfortunately sometimes there seems to be an interest by the municipality to transform ports from an industrial and commercial area into a more recreational area. This has a damaging influence on the work done to transfer cargo from road to sea.

Environment

In December 2009 Denmark will host the International Conference on Climate. Environmental issues are generally given high priority on the political agenda.

Education

Education is still given high priority. Danish Shipbrokers' Association is Distance Learning Centre for The Institute of Chartered. In 2008 students attended 144 examinations. An application for official approval by the Danish authorities of a new (and international) "Bachelor in Shipping" has just been filed. In Denmark there are two different MBA's specializing in shipping.

Members' meetings

During the spring meetings were arranged in different areas with the members in order to inform of the various activities the Association is involved in, the various political activities, legal aspects etc. During the fall our Annual General Meeting is held.

Member Association Report — FINLAND

Association: *The Finnish Shipbrokers Association*

Membership: 71

Contact: *Mr. S. Lomberg*

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Population:	5.3 million
GDP 2007/8:	US\$ 274 Billion
Total Volume of Imports (2007/8):	US\$ 87.51 Billion
Total Volume of Exports (2007/8):	US\$ 96.62 Billion
Principal Commodities Imported:	Foodstuffs, petroleum and petroleum products, chemicals, transport equipment, iron and steel, machinery, textiles, yarns and fabrics, grains
Principal Commodities Exported:	Electrical and optical equipment, machinery, metals, paper, pulp, chemicals, timber

The recession that began end 2008 continued strongly during first half 2009. Within finance and business it is commonly felt that the economic climate has strongly declined during the past six months. In particular the shipping sector has been hit hard because of the drastic fall of both export and import as well as and transit volumes. A pick up in the economic environment is though generally anticipated during the coming months. There is however significant differences in estimates of the near future development. The measures agreed upon last year by the Government to promote Finnish shipping, mainly the revision of the tonnage tax, have not yet been put into force. As a consequence the share of the foreign trade transports carried by vessels flying Finnish flag will further decline.

The new IMO regulations to be implemented 2015, on reducing sulphur emissions within the SECA areas will heavily influence the sea transportation within the Baltic in the years to come. Bunker costs for vessels will increase and will most probably thereby also the freight rates. The logistic costs for the Finnish trade and industry are already now higher than those of the competitors. The pressure on the maritime sector to further streamline operations and activities will be high. This could result in a concentration of the transports to/from Finland to fewer ports and bigger vessels.

Finnish road-, rail- and maritime administrations, now working as separate independent offices, are by Government decision consolidated into one office only as from January 2010. The majority of the Finnish maritime cluster considers this as a severe drawback for the shipping industry in Finland.

The Finnish Shipbrokers' Association held its 89th annual meeting in Helsinki, March 19th 2009. The activities of the Association led by the Chairman has proceeded as planned. Still this year the issue of fairway dues is high on our agenda. The Law on Fairway dues was from the beginning of this year altered to correspond with EU legislation. Regrettably we still opine that the revised law does not comply in full with the EU legislation and the EU Commission has been informed accordingly. More than 100 vessels applied within 2008 for restitution of the fairway dues that Customs earlier had levied retroactively. The customs interpret that the time bar for restitutions are 2005. Many legal advisors however do not share this view. Court ruling on this still to come.

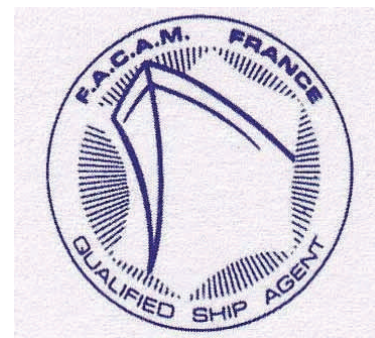
The Government has proposed a revision of the Pilot Act. The base of the proposal is that the piloting will not be opened for competition and the state owned piloting company "Finnpilot" would be exclusive operator of this activity. The Association strongly opposes this and sees no obstacle not to open the piloting market for competition. Positively in the Governments proposal for revision of the Pilot Act is that it recommends that the English language is to be accepted as basis for granting pilot license. We are pleased that this issue which we have promoted for years now could be put into practice.

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 originally planned to become effective July, 2009 but now fortunately postponed until beginning 2011.

The amount of members is 71 and one application for membership is on the table. The economy of the Association is as budgeted as based on the membership fee only.

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

Population:	64 million
GDP 2007/8:	US\$ 2.801 Trillion
Total Volume of Exports (2007/8):	US\$ 589 Billion
Total Volume of Imports (2007/8):	US\$ 668 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

2008 turned to be a very contrasting year. The first half was rather satisfactory as far at least as freight rates were concerned, enabling brokers to carry on making profit of their high levels. The social climate connected to the port reform made however things more difficult for the ship agents and operators.

The vote of the law on July 4th 2008 should have brought some good news and hopes in that latter field, although many discussions were still planned to arrange things port by port.

And then the financial and economical crisis arose, preceded by the heavy increase of prices of energy which brutally crashed into our industry. And the freight rates and traffics fell as brutally as the world consumption did.

In that context our federation had to work on two main directions.

The first one was the follow up of the said port reform, as after the vote of the law many items were left to a negotiation between the parties. The crisis of course did not help as the traffics were far from matching the planned expectations, which allowed suspicion on both sides to possibly take advantage of the situation for changing some of the parameters of the agreements.

Besides that law also established a new type of port governance and we had to see to a proper representation of our professions in each board or committee where it was possible.

As a matter of fact things are slowly moving with reasonable hope of success. A new convention concerning the staff is almost finalized on the national level and discussions are taking place locally for a fair estimation of the transferred costs, with as always the Brussels spectre.

The follow up of the other routine subjects has taken the rest of the time, most of the topics raised up the last few years being still on the table, like the AEO in which the French professionals are gradually getting interested.

The end of the conference system in October 2008 also brought some trouble mainly amongst the liner agents, their behaviour and policy of communication being seriously affected by the new rules.

As far as costs are concerned, no important changes occurred in main tariffs this year but we will have to follow that item closely in order to avoid that the crisis in addition to the financing needs of the port reform lead to unjustified increases.

Member Association Report — GERMANY

Association: *Zentralverband Deutscher Schiffsmakler*

Membership: 400

Contact: *Mr. K. Bültjer*

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Population:	82 million
GDP 2007/8:	US\$ 2.918 Trillion
Total Volume of Exports (2007/8):	US\$ 1.498 Trillion
Total Volume of Imports (2007/8):	US\$ 1.232 Trillion
Primary Commodities Imported:	Machinery, vehicles, chemicals, foodstuffs, textiles
Primary Commodities Exported:	Machinery, vehicles, chemicals, metals and manufactures,

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, Wilhelms-haven, Duisburg, Stuttgart) representing a total of about 400 member companies.

Shipping has benefited enormously in recent years from positive developments in globalisation. In the course of 2008, the financial and economic crisis reached practically all areas of shipping. Growth in transport volume was substantially down, and freight and charter rates came under enormous pressure. Many ships were no longer able to earn their operating cost, let alone their capital cost. Enormous ship tonnage was laid up in all categories.

So, inevitably, ship brokers likewise came under severe economic pressure. They were forced to cut costs or even to lay off staff. The member companies of the German Shipbrokers Association (ZVDS) expect more advice and support from their association in difficult times like these. So ZVDS increased its provision of information on labour law issues, and also courses for training and continuing education of young ship brokers and agents. It also conducted intensive negotiations with practically all service providers in port, in order to keep the costs of call as low as possible. That applies in particular to pilotage, handling and port costs.

Hamburg is one of the world's most important centres of ship financing and ship buying and selling. This is a sector which was particularly hard hit by stagnation in the market for newbuildings and used vessels. A model known as Long Term Asset Value (LTAV) was developed by the Hamburg Shipbrokers' Association to help. It is aiming to determine the value of a ship on the basis of its long-term earnings potential. The new standard has been tailored specifically to dysfunctional markets and irregular market conditions. Developed in close cooperation with ship value appraisers as well as certified accountants, owners, banks and brokers. The LATV has gained wide acceptance in the industry, making a major contribution to improving the situation in the finance market.

The Hamburg Shipbrokers' Association publishes the Hamburg Index (HAX) and the ConTex for precise analysis and observation of the time charter market in container shipping. The HAX reports monthly on time charter rates actually agreed. ConTex gives twice-weekly information on the currently estimated time charter rates for three selected ship types, without the requirement for closure of contracts. An index is then calculated from these data. Inputs are now provided by 18 broker companies from Hamburg, Copenhagen, Paris and London.

Another important service provided by the Hamburg and Bremen Shipbrokers' Associations is the Freight Committee. It is a monitoring system for all liner agents and shipowners who issue freight-prepaid bills of lading to forwarding agents without having received the marine freight payment in advance. The system monitors the creditworthiness and payment behaviour of freight debtors.

Every year the Hamburg Shipbrokers' Association organises the traditional "Eisbein-essen", a dinner event which counts among the major events in the social calendar. In 2008 it was attended by more than 5000 guests from more than 50 nations. Italy was the official partner country in 2008; Norway has been designated as partner country for 2009.

Member Association Report — GREAT BRITAIN

Association: *The Institute of Chartered Shipbrokers*

Membership: 108

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Population:	61,113,205
GDP 2007/8:	US\$ 2.137 Trillion
Total Volume of Exports (2007/8):	US\$ 467.7 Billion
Total Volume of Imports (2007/8):	US\$ 645.7 Billion
Principal Commodities Imported:	Fuel, Manufactured Goods, Food
Principal Commodities Exported:	Fuel, Chemicals, Manufactured Goods, Food, Beverages

The UK ports sector is the largest in Europe by tonnage of cargo with over 95% of UK imports and exports by volume and 75% by value pass through UK ports annually. In 2008, UK ports are estimated to have supported 360,000 jobs (including direct and indirect impacts) and are estimated to have contributed £18 billion to the UK GDP. The impact of ports extend well beyond these narrow estimates with a large number of industries highly dependent on ports for their existence (for example, fishing, marine dredging and sectors that rely on imports of bulk raw materials or export finished goods).

A recent study revealed that the UK maritime services cluster supports around 500,000 jobs in total in the UK and accounts for some £25 billion of the UK's Gross Domestic Product (around 2% of the UK total in each case).

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 UK Border Agency (UKBA), Maritime Coastguard Agency (MCA), the Home Office, Department for Transport (DfT) and SITPRO amongst others.

Through the 'One Voice' initiative (where we have joined up with the Baltic Exchange, British Ports Association, the Chamber of Shipping, Maritime London and the UK Major Ports Group) Federation Council has been instrumental in raising the profile of matters affecting the UK maritime sector such as issues surrounding the Valuation Office Agency's handling of the port rates revaluation and the backdating of rates.

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 a large number of 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 2009.

Various levels of study and examination covering all of the main disciplines of shipping, shipping law, economics and finance are available and the recently developed Offshore course was examined for the first time in April.

For further information on the Institute of Chartered Shipbrokers, Federation Council and its Committees, please visit our website at www.ics.org.uk

Member Association Report — HUNGARY

Association: *The Hungarian Shipbroking & Shipping Agents Association*

Membership: 11

Contact: Mr. P. Demeter

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website:



Population:	9,905,000
GDP 2007/8:	US\$ 131.4 Billion
Total Volume of Exports (2007/8):	US\$ 106.6 Billion
Total Volume of Imports (2007/8):	US\$ 106.5 Billion
Principal Commodities Imported:	Machinery and equipment, other manufactures, food products, raw materials, fuels and electricity
Principal Commodities Exported:	Machinery and equipment, other manufactures, agricultural and food products, fuels and electricity, food products, raw materials

The Republic of Hungary joined NATO in 1999 and the EU in 2004. The global financial crisis, declining exports, and low domestic consumption and fixed asset accumulation, dampened by government austerity measures, will result in a negative growth rate of about -1.5% to -2.5% in 2009.

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) but due to financial reasons suspended its associate membership of MSZSZ (Association of Hungarian Forwarding and Logistic Service Providers) at the beginning of 2009. Our first President and Honorary President for life, Capt. Ferenc Bores passed away in 2008. and as a consequence the number of the members of the Association decreased to 10 in total (7 companies and 3 private persons only) which is the minimum number to keep the Association vital. 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 2008/2009 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 and probably such effort will fail also in the future due to the global and local financial crisis.

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 2008/2009 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 our representatives regularly attended the important foreign and local forums and seminars of the industry.

Member Association Report — IRELAND

Association: *The Irish Ships Agents Association*

Membership: 38

Contact: *Mr. P. Cooney*

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website: www.irishshipagents.com



Member of FONASBA

Population	4,203,200
GDP 2007/8:	US\$ 188.4 Billion
Total Volume of Exports 2007/8:	US\$ 119.6 Billion
Total Volume of Imports 2007/8:	US\$ 80.94 Billion
Principal Commodities Imported:	Data processing equipment, chemicals, petroleum, textiles
Principal Commodities Exported:	Machinery and equipment, computers, pharmaceuticals, chemicals, live animals and animal products

The Irish Ship Agents Association (www.irishshipagents.com) has 38 member companies operating out of every port in the Irish Republic. The Association benefits from having 'Consultancy' status with the Irish Department of Transport & enjoys a strong working relationship with the Irish Maritime Development Office (www.imdo.ie). We also have affiliation and close working relationships with the Belfast Ship Agents Association in Northern Ireland.

Our members have been hit very hard this past year by the global downturn in the economy however shipping data indicates signs of traffic recovery.

The latest analysis of 2009 shipping traffic data published by the Irish Maritime Development Office (IMDO) indicates that the rate of decline of shipping on the island of Ireland eased during the 1st half of 2009. However the overall volume of traffic handled at ports on the island continued to decline over the first 6 months of 2009 compared to the same period in 2008.

Following a peak in traffic volumes in all shipping sectors through Irish ports during 2007 a steady decline took place with significant volume corrections occurring in the market in line with the general downturn in both the domestic and global economies.

With regard to costs, the association did not seek an increase in tariffs in view of the economic situation and fortunately the majority of ports in Ireland also froze their charges for 2009. However despite the lobbying of our association and other shipping groups the Dept. of Transport did increase the cost of light dues & the number of voyages for which a vessel must pay from 7 to 9 for vessels calling at Irish ports.

This past year the association has been heavily involved in consultation with the Dept. of Transport in the setting up and implementation of SafeSeasIreland (SSI) which is the Irish implementation of Directive 2002/59/EC and is the Irish link in SSN. (Safe Sea Network). This is an internet based system for the sending of pre-arrival & sailing information for vessels entering and departing Irish Ports. The views of the association have also been sought in relation to several regulative draft reports.

The association is also represented on the Customs Consultative Committee with the Office of The Revenue Commissioners which is the primary state body responsible for the assessment and collection of taxes and duties in the republic of Ireland.

In conclusion despite the recent economic downturn we remain strong and committed to promoting the aims of the association and apologise that unfortunately we cannot be present at FONASBA AGM in Cape Town and wish all members every success and we will hopefully see you all in Varna in 2010

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 2007/8:	US\$ 200 Billion
Total Volume of Exports 2007/8:	US\$ 51 Billion
Total Volume of Imports 2007/8:	US\$ 65 Billion
Principal Commodities Imported:	Consumer goods, raw materials, investment goods, fuels, diamonds, ships and aircraft
Principal Commodities Exported:	Agricultural products, manufactured goods, diamonds

By the 2nd half of 2008 we could feel the impact of the Global Recession and volumes of cargo as well as Ships calls to Israeli Ports were reduced. Unfortunately forecasts for 2009 are on the low side as well. During 2008 Israeli Ports handled about 40 million tons of cargo (excluding oil & coal in bulk). Bulk cargo handled well about 4.3 million tons (out of which 77% were handled in Ashdod).

257, 000 cars & trucks were discharged (18% increase compared with previous year), 56% out of it in Eilat Port. Containers traffic remained as by 2007 (about 2 million TEU). Israel continued to import mainly from Europe, East Med and the Far East.

Major destinations for Israeli Export were Europe, East Med and USA.

PORTS

All Israeli Ports functioned under normal terms with no congestion or labor unrests which were very common in previous years.

NEW PORT 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 payable by the carriers.

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

During 2008 the Israeli Chamber of Shipping together with the Ministry of Education have organized special lecturer on Shipping & Logistics to young students (age 14-17 years).

We have also organized for school students guided tour in the ports of Ashdod & Haifa introducing the Shipping industry to the young generation.

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: 625

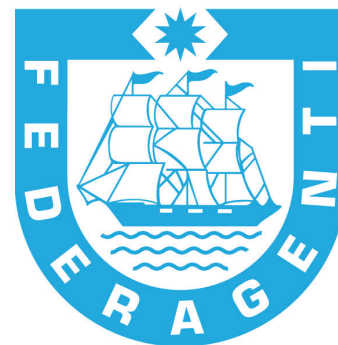
Contact: *Mr. M. Paifermann*

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e-mail: info@federagenti.it

website: www.federagenti.it



Population:	60,088,880
GDP 2007/8:	US\$ 2.314 Trillion
Total Volume of Exports (2007/8):	US\$ 525.5 Billion
Total Volume of Imports (2007/8):	US\$ 537.9 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 has been developing several important activities during last year under the chairmanship of Filippo Gallo, elected in 2008. The 2009 has seen the celebration of the 60th anniversary of Federagenti during our annual meeting last May in Genova.

In last year report we wrote that the first moves of the present Government were encouraging to our industry. Unfortunately today we cannot confirm that those promises have been kept. The Italian shipping industry is still facing a poor infrastructural system. We are still suffering the same problems with dredging which is limiting the expansion of traffics. At the present time Gioia Tauro port is the only one able to accommodate an 11.000 teus vessel.

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.

One of Federagenti's most important aim has always been to promoting collaboration between associated sectors. It is indeed significant that our past president Umberto Masucci is today vice-president of "Federazione del Mare", the Italian Federation that brings together the most influent organizations of the Italian Shipping Industry (20 Associations of the shipping, port and logistic sector).

We have been guaranteeing a continuous support to all initiatives addressed to modernize the laws and regulations of the Country. Federagenti is still promoting and waiting for the reform of the law 84/94 that regulate the Italian ports, pointing out the necessity of a Port Authority financial autonomy and reorganization.

In this year Federagenti has presented the draft of "Buona Governance" for its own members under the logo of "EGO" which stands for Excellent Governance. The project has been very well welcomed and approved by our Ministry of Transport, Harbour Master / Coast Guard, Assoporti, Confitarma and Fedarlinea. We are very proud that the certification body for this quality certificate will be our prestigious Italian Register, RINA. This reflects our aims to select the most significant elements of international standards in terms of quality, environment, workers safety and social responsibility for ship agents and ship brokers.

The Branch of Federagenti dedicated to Agents working with Yachts and Sailing Boats is growing and today counts more than 70 companies associated at the service of more than a thousand Yachts calling Italian ports every year.

The Young Shipagents Branch, very well managed by Gabriele Scotto, is expanding more and more. Today counts 7 regional associations and more than 100 members. It is indeed considered as good practice in the Industry and we like to see it as a possible good sign for our future. The most relevant activity of the group has been the organization, together with the Coast Guard, of a road show in several Italian ports with conferences and debates on PSC.

Another important project called "Cittadini del Mare" has seen Federagenti working together with the Coast Guard and WISTA. The project has brought together 15.000 primary school students making a drawing on the sea, its inhabitants, safeguard, workers.

Member Association Report — JAPAN

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

Membership: 114

Contact: Mr. E. Itoh

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e-mail: jafsa@themis.ocn.ne.jp

website: www.jafsa.jp

Population 127,966,170

GDP 2007/8: US\$ 4.385 Trillion

Total Volume of Exports (2007/8): US\$ 709.67 Billion

Total Volume of Imports (2007/8): US\$ 619.85 Billion

Principal Commodities Imported: Crude Oil, LNG, iron ore, coal,, foodstuffs,

Principal Commodities Exported: Cars, electronic equipment, steel products

JAFSA has been working very actively, and we have had three Seminars during the last period between June, 2008 ~ May, 2009 for encouraging staff members to improve their professional capacity. Also we had Hands-on Learning by NYK's Ship Handling Simulator at end June, 2009, especially for our young staff which simulated arrival off Tokyo Bay to the entering of Yokohama. We are convinced it was very useful training for young agency staff.

Meantime, although some members were resigned and/or terminated membership of our association due to under reduced market, we tried hard to invite new-members to let them join our association and achieved successful result.

JAFSA undertook following activities as usual:

- Monthly Board meeting.
- Issuing "JAFSA News" monthly in Japanese, and send same to all member, Government's office and concerned Associations, together with all Notices and/or useful Information which issued/prepared by Government and/or Public organizations.
- Seminar about "AIS System" on July 2008.
- JAFSA Golf Competition on Oct.2008 and on May 2009.
- Seminar about "Basic Shipping Terms – Part 1" on Nov.2008
- JAFSA Annual Meeting on Jan. 2009.
- Seminar about "Basic Shipping Terms – Part 2" on Apr. 2009.
- Started Working Committee to introduce Q/S to Japan.

We, as JAFSA, are represented on several Government and/or Public Organizations' committees covering maritime issues such as;

- The Council of Oil Pollution Prevention in Tokyo Bay
- Safe Navigation for Maritime Disaster Prevention in Tokyo Bay.
- Maritime accident prevention committee during the construction of D-Runway at Haneda International Air Port.
- Maintaining safe Navigation in Port of Tokyo while reclaiming land from the sea.
- Safe Navigation at congested area such as Inland Sea, Ise-Bay, Tokyo-Bay and other specific congested Area.
- Safe Navigation and Maritime disaster prevention committee for Sakhalin Project at Northern Hokkaido.

Member Association Report — KENYA

Association: *The Kenya Ships Agents Association*

Membership: 28

Contact: *Capt. Frederick O. Wahutu*

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website:



Population:	39,002,772
GDP 2007/8:	US\$ 30.24 Billion
Total Volume of Exports (2007/8):	US\$ 4.958 Billion
Total Volume of Imports (2007/8):	US\$ 11.07 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

Port Operations: Operations at the port have largely normalized after the 2008 upheaval. Container traffic is down, due to the global recession, whereas conventional cargo has picked up especially in the dry bulk sector. This is largely due to the importation of grains (maize and wheat) due to droughts and poor harvests. This state of affairs is likely to continue throughout this year. The 24/7 port operations has picked up well and although some minor problems are still being experienced, congestion is no longer a problem, waiting time is now less than two days. The Kilindini Waterfront Automated Terminal Operations System (KWATOS) is now in full operation and the port, in consultations with the stakeholders, is in the process of fine tuning the system. The port's service delivery has improved since its introduction but there is still room for further improvements.

Value Added Tax: Under the 2009/2010 budget, all services rendered by the port are now deemed to attract VAT at 16%, including pilotage, towage, mooring and stevedoring. The KSAA strongly opposed this move and even engaged the services of VAT experts to fight the case on their behalf. Sadly, they did not succeed and now even agents are required to include VAT on their invoices for services rendered.

Land Transport: The rail system has not shown much improvement although, due to the drop in imports, inland rail bound containers are no longer delayed at the port. Road transport has also been hit by the drop in imports and a large number of trucks, especially those licensed to transport transit goods, are idle. A proposal that these trucks be used to ferry local goods was not taken up by the Kenya Revenue Authority. Since the introduction of three axles on Kenyan roads, the drop in imports has led the operators to grossly overload their trucks in a bid to maximize earnings. Legislation has therefore been introduced to hold the owner of the truck, not the driver, liable for any such actions. We hope this will help curb this menace and save our roads.

Electronic Delivery Orders: The port is in the process of implementing electronic delivery orders. The KSAA supports the move has some concerns about the security of the system. We therefore maintain that cargo shall only be released on production of the hard copy of the Delivery Order.

Agents and Ships Charges: The Kenya Maritime Authority (KMA), the Kenya Shippers Council (KSC) and the Inter-Governmental Standing Committee on Shipping (ISCOS) recently drew up a document which contained, among other issues, charges made by agents and shipping lines. Some of the charges included were those for: Delivery Orders; container deposit; Terminal handling; container cleaning and repairs etc. We have since responded and are now waiting for a meeting to be convened to further discuss the issues.

The Merchant Shipping Act 2009: At last Kenya has a new Merchant Shipping Act. The Act addresses most sectors in the maritime industry and has made it easy for international maritime conventions to be domesticated into national laws. There is, however, section 16 (1) of the Act which some players in the industry find rather disturbing.

The section states "No owner of a ship or person providing the services of a shipping line shall, either directly or indirectly, provide in the maritime industry the services of crewing agencies, pilotage, shipping agent, terminal operator, container freight station, quay side service provider, general ship contractor, haulage, ship broker, ship breaker, ship chandler, cargo consolidator, ship repairer, maritime training or such other services that the Minister may appoint under section 2"

Our interpretation of this section is that it will not encourage investment in the maritime sector in the country.

Member Association Report — MEXICO

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

Membership: 56

Contact: *Ms. Claudia Arroyo Sanchez*

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Population: 107.8 Million

GDP 2007/8: US\$ 1.563 Trillion

Total Volume of Exports (2007/8): US\$ 291.8 Billion

Total Volume of Imports (2007/8): US\$ 308.4 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

AMANAC Goals

AMANAC was incorporated as an institution devoted to the defense of the shipping agents' interests, representing them before national and international authorities, service providers, unions, associations and chambers.

Nowadays, AMANAC stands for the most important Shipping Agents in Mexico, who represent 95% of all national and foreign ships that call at Mexican ports, carrying importation, exportation merchandize and passengers.

With the purpose to offer a better service to our customers and to be able to identify the problems that affect our sector, port branches have been established in order to give support where operations and many shipping problems take place.

AMANAC Projects.

Progress in crisis time.

The AMANAC, in its role of serving as representing major shipping agencies before authorities, service providers, maritime labor unions, among others, has been arranging deals in fee discounts to help alleviate some of the great depression that runs through our sector.

In the towing service, the authority approved an average increase of 16% service charges tug beginning of this year, so the AMANAC arranged with the Mexican Association of Ship owners Maritime Tugboat (Peering) application of the proportional increase in both periods. (Exclusively for partner AMANAC).

Regarding the pilots services, responding to authority, the tariff increases of piloting services for all relevant national ports for 2009, were approved by the authority for implementing the proportional increase in both periods.

With regard to increases in charges for use of port infrastructure, led by the Integral Port Authorities, the Maritime Port Authority in a pact of solidarity with the shipping industry, decided that this year there would be no increases in their rates, so that, at ports of Ensenada, Manzanillo and Lazaro Cardenas are offering special rates that will encourage maritime traffic to the ports mentioned.

Moreover, the fiscal area, or dry port, operated by Ferrovalle, better known as the Terminal Pantaco agreed with AMANAC that their increases for 2009 were given to 50% in the first period 6 months and 50% in a second period of the year, this exclusively for our members

Member Association Report — MOROCCO

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

Membership: 54

Contact: *Mr. A. El Glaoui—President*

219, Bd des FAR. CASABLANCA 20 000, Morocco

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website: www.apram.ma



Population:	34,000,000
GDP 2007/8 :	US\$ 155 Billion
Total Volume of Exports (2007/8):	US\$ 13.50 Billion
Total Volume of Imports (2007/8):	US\$ 29.00 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 2008 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.

HARBOUR ACTIVITIES AND NEW REGULATION

The harbour activities in Moroccan ports in the framework of the new regulation which entered in force in December 2006, start to produce good results at the level of port services performance and productivity.

Beside the first stevedore operator (MARSA-MAROC) the second designated one (SOMAPORT) start recently operating in the second containers terminal with a capacity of 500.000 EVP, the investment incurred for equipment was for about 90 M US \$ for the new terminal.

A third terminal will be launched shortly in view to lift Casablanca port capacity to 1.500.00 EVP.

AGENCY AND BROKING PROFESSION AND ACTIVITIES

Association is still conducting negotiations with the MARINE MERCHANT ADMINISTRATION in respect of the forthcoming regulations of the activities of ship agents and brokers and their requirements. It is a matter of a great concern for our members, hoping to reach a consensual agreement shortly.

FONASBA QUALITY STANDARDS

A dedicated commission has prepared a project of “APRAM QUALITY LABEL” in compliance with the FONASBA Quality Standards. A by law draft has been prepared for discussion and adoption.

APRAM RECOMMENDED TARIFFS

The final document has been approved and entered in force in November 2008 in respect of the recommended tariffs.

CODE OF CONDUCT AND ETHICS

The executive committee adopted in December 2008 the final draft of the code of conduct and the ethics chart. All members of APRAM committed to respect a fair practice of our profession.

EDUCATION PROGRAMMES

APRAM launched an education program for members internally and in collaboration with the educational programmes of “Agence National des Ports”. A shipping education for trainees has been developed (SEMINARS, ROUND TABLE...).

GENERAL ASSEMBLY

The Statutory General Assembly shall be organised no later than 30 November 2009.

Member Association Report — VRC, NETHERLANDS

Association: *Vereniging van Rotterdamse Cargadoors (VRC)*

Membership: 106

Contact: Mr. M.S.B. Duin

Postbus 54200, 3008 JE ROTTERDAM, The Netherlands

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Population:	16,500,000
GDP 2007/8:	US\$ 565 Billion
Total Volume of Exports (2007/8)	US\$ 446.2 Billion
Total Volume of Imports (2007/8)	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. While its main focus is on its members, it also aims 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. Achieving the above demands intensive contact between all parties in the port, including industry, the government and fellow trade associations.

The decline in the last quarter of 2008 also has some favourable aspects. It has shown how interdependent all those concerned are, and the official bodies involved are now conspicuously proactive. There was a time when we would criticise them for doing nothing but issue directives, leaving the industry to sort out the details but they now appear to have taken our message on board. It has to be noted on the other hand that industry tends to stand alone where financial matters are concerned. I would mention in this connection the initiative to create a Port Community System (PCS) in Rotterdam. It will be vital when the goods flow resumes its expansion, as it inevitably will, to utilize available capacity efficiently, to plan soundly, and, most important of all, to communicate clearly. VRC is therefore delighted to have Portbase as a creator and facilitator. We are investing time and money to achieve the above aims, but the investment benefits both the government and our peers in industry. However, we must observe that our sector ultimately has to bear many of the financial burdens, although it goes without saying that this cannot be right. One of the themes in the coming period must therefore be how to eliminate this inequality.

The introduction on 1 July 2009 of the statutory European eCustoms obligations dominated both local and European consultation. Preparations for the Import Control System (ICS) and the Export Control System (second phase) have led to a large volume of detailed consultation and amendment. Agreement has been reached on a European level on postponing some of the obligations, such as the 24-hour manifest rule, to 1 January 2011. After some urging, industry has been allowed more time to amend its systems, in view of the authorities' belated publication of the message implementation guide. VRC has organized various information meetings about eCustoms. A meeting of this kind was also organized with the World Shipping Council (WSC), with which VRC has close ties.

There has been lengthy consultation about ECS with Customs and with the terminals, and specifically about who in the chain is to be responsible for which electronic obligations, within the framework of the statutory, but in practice still nonexistent, Trader at Exit function. Furthermore, the content of the electronic Customs manifest remained unclear for some considerable time. VRC is aiming to preserve the well established practice of having the terminal produce the customs manifest on behalf of the shipping agent. The related discussions continued in 2009. Port infolink, now merged with Amsterdam's Portnet, to become Portbase developed a supporting service with added value in the form of track and trace functionality. The costs of this service were divided equally among shipping agents and terminals, which initially led to some reluctance on the part of shipping agents to commit to the system.

The voluntary Authorized Economic Operator (AEO) system that was introduced on 1 January 2008 gained momentum with some difficulty. Industry saw too few benefits to justify investment, despite being aware that AEO is a step on the way to an international standard that will facilitate concepts such as Smart and Secure Trade Lanes (or Green Lanes). Shipping agents stood only to keep what they actually already had, which is the CoPaCo scheme for announcing checks for unloading a marine vessel. VRC lobbied Customs for expanding the facilities.

Regarding developments in the region, VZC (Flushing/Terneuzen) stated that it is still aiming to achieve a greater share of the container segment through construction of the Westerschelde Container Terminal. Zeeland Seaports has started on the path towards becoming a public limited company (Dutch NV), like Rotterdam some years ago. VNNS (North Netherlands) reported that it is lobbying for a large lock in Delfzijl. A positive point is the growth in employment, which is unfortunately countered by a population decline in the region. Oram (Amsterdam) together with the Port of Amsterdam noted that it is aiming for an expansion of 7.5% in the next few years, with no significant expansion of available space. VRC (Rotterdam) expressed satisfaction with the additional terminal capacity in Rotterdam, the infrastructure improvement measures, and the (then) still growing cargo flow.

Member Association Report — NORWAY

Association: *Norwegian Shipbrokers' Association*

Membership: *141*

Contact: *Mrs. G.C. Noer*

Fr. Nansens Plass 9 0160 OSLO, Norway

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website: www.shipbroker.no



Population:	4,834,311
GDP 2007/8:	US\$ 424 Billion
Total Volume of Exports (2007/8):	US\$ 204 Billion
Total Volume of Imports (2007/8):	US\$ 122 Billion
Principal Commodities Imported:	Vehicles, industrial machinery and equipment, electrical machinery, and appliances, manufactured and consumer goods
Principal Commodities Exported:	Oil, gas, metals, fish, mineral oils, industrial machinery and equipment, services (shipping)

Membership

We currently have 141 members and are pleased that the membership has remained stable through the financial crisis.

Activities

Education has been a main focus of our activities also this year because we believe that building competence is a crucial activity for our association and the shipping industry as a whole.

The NOx-tax which the government introduced from January 1st 2007 has also been on our agenda this year. Our main concern here is that foreign ship owners have to pay this tax through a Norwegian representative, which in practical terms mean the port agent – and this representative is jointly responsible for the payment of this tax and that the tax is assessed correctly. We have advised our members not to get involved in this and as a consequence hardly any foreign ship owners pay this tax.

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 Tallinn, Estonia in May, and celebrated our 90th Anniversary. It was a great success, both in terms of venue as well as the meeting, seminar and social activities.

Norwegian shipping

As of January 1st 2009 The Norwegian controlled fleet totalled 41,7 million dwt, an increase of 2% since January 1st 2008. The total number of ships is 1876, and of these 48% fly the Norwegian flag, which is up 1% since January 1st 2008. Building orders of ships for Norwegian account decreased to 344 during 4th quarter 2008, of these 166 ships were off shore service vessels (104 built at Norwegian yards). In addition 25 mobile offshore units were on order as of 1st January 2009, representing 14% of the world's order book. The total value of ships and rigs on order for Norwegian account is NOK 221 billion (USD 36 billion). The Norwegian yards accounted for the largest number of vessels on order from Norwegian shipping companies with 104 ships. This year China ranked second with 91 ships, followed by South Korea with 45 ships, India with 23 ships and Japan with 19 ships.

The main turbulence in the industry last year was the introduction of the new tonnage tax system. The introduction of the new system canceled the old tonnage tax regime and the Government demanded payment of the total tax credit accumulated under the previous regime, a total of NOK 21 billion. One third of this amount may be offset against environmental initiatives by the ship owners. No ship owners had calculated with having to pay this as long as they remained in the system, and there have been 2 suits against the government so far this year in lower courts where ship owners argued that the Government's demand for payment is unconstitutional. The ship owner who brought the suit in Grimstad lost but the ship owner who brought the suit in Oslo won. This will no doubt end up in the Supreme Court eventually.

Member Association Report — PERU

Association: *Asociacion Peruana de Agentes Maritimos (APAM)*

Membership: 57

Contact: *Mr. Sabino Zaconeta Torres*

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Population:	28,220,764
GDP 2007/8 (US\$):	US\$ 134.4 Billion
Total Volume of Exports (2007/8):	US\$ 31.236 Billion
Total Volume of Imports (2007/8):	US\$ 29.883 Billion
Principal Commodities Imported:	Petroleum, crude oils or bituminous products, oil, mobile phones, maize, vehicles, tractors,
Principal Commodities Exported:	Gold, silver, copper, zinc, lead, minerals, fishmeal, coffee

Composition

APAM is a business union covering shipping agencies operate in Peru's sea, river or lake ports. There are currently 57 members. It has an active presence in diverse sectoral committees and consultative councils addressing sea, port and customs problems. APAM is actively defending its members in negotiation with various state bodies, and at law, and has successfully overcome illegalities, bureaucratic barriers and overcharges that affect the operation of the members, for the benefit of Peru's foreign trade. Its has also drafted proposals that support its members and other business sectors. Also, regular appearances by the President in written and broadcasted media has ensure APAM is an opinion leader in sector-relevant matters.

Milestones 2008 – 2009

- Implementation of the Internal Traffic Procedure for maritime cargo without requiring a bank guarantee bond and using the cargo manifest as sole control document. Likewise, it contributed to expedite transshipment operations.
- The Judiciary, in the last instance, declared as illegal the charge made by the Harbor Master and Coastguard Authority (DICAPI) for the Safety Inspection during vessels arrival and departure operations (G-08 Procedure).
- The mandate of the Ministry of Labor that required the business union to negotiate with port stevedores per ACTIVITY CATEGORY was eliminated.
- Elimination of the Resolution of the Ministry of Labor that created two port work specialties lacking real foundations and which increased the number of members of stevedore teams.
- The Peruvian Competition Agency (INDECOPI) declared as illegal, in a first instance, the amounts collected by the National Port Authority for vessel arrival and departure, which are an illegal bureaucratic barrier. INDECOPI provided that the new amounts will be collected based on the service cost.
- The Peruvian Competition Agency (INDECOPI) eliminated a provision by the National Port Authority that ordered companies to pay, on a direct basis, disability compensations and medical care to port workers, in addition to payments to the Social Security.
- Specialized training for 1300 people, directly benefiting associated companies by increasing their workers' efficiency levels.
- On October 12, 2008, the association celebrated its 25th anniversary of institutional life engaged in foreign trade. The event permitted to reassert the commitment to unconditionally support associated companies, contributing to remove and eliminate any type of bureaucratic barrier against their interests.

International situation

Currently, APAM chairs the Inter-American Chamber of National Shipping Agents Associations (CIANAM). Both it and FONASBA have provided support for our association, publishing press releases in main written media requesting the abolition of Legislative Decree No. 1022 that established monopoly in port facilities. These communications were answered by the President of the Republic of Peru, Alan García Pérez, who instructed the relevant authorities to re-evaluate the regulation.

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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e-mail: agepor@mail.telepac.pt

website: www.agepor.pt



Population:	10,707,924
GDP 2007/8 (US\$):	US\$ 223.1 Billion
Total Volume of Exports (2007/8):	US\$ 57.80 Billion (FOB)
Total Volume of Imports (2007/8):	US\$ 87.92 Billion (FOB)
Principal Commodities Imported:	Petroleum, agricultural products, food products, machinery
Principal Commodities Exported:	Clothing, footwear, cork, paper and paper products, wine, vehicles

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 Transport Sector..

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, together with other associations in lobbying continuously in 2008 in favour of the maritime economy development in Portugal.

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 important and remarkable that AGEPOR organized, as in 2007, 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.

In 2008, holding the Vice-Presidency and the Executive Direction of the Portuguese Shortsea Promotion Centre, AGEPOR has participated actively in disseminating the need of increasing the Shortsea Shipping in Portugal. Together with other 20 European countries AGEPOR has been involved in the ESN – European Shortsea Network promoting the SSS all over Europe.

AGEPOR is chairing ECASBA since 2008 and participates enthusiastically and actively in all matters related to FONASBA/ECASBA.

Member Association Report — SLOVENIA

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

Membership: 24

Contact: *Mr. E. Bandelj*

Ferarrska 2, 6000 KOPER, Slovenia

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website:

Population: 2,045,840

GDP 2007/8 US\$ 54.64 Billion

Total Volume of Exports (2007/8): US\$ 29.59 Billion

Total Volume of Imports (2007/8): US\$ 33.43 Billion

Principal Commodities Imported: Fuel, cereals and food products, motor vehicles, textiles

Principal Commodities Exported: Wood products, industrial goods and domestic appliances

On October 2008 Slovenia elected a new Government and in addition to a new Premier we also saw the appointment of a new Minister of Transport and Director of the Maritime Department. From our Association's perspective, however, there were no major changes.

Traffic in Slovenia's only commercial port, Koper, decreased by 14%, the biggest decrease being in cars traffic, down 40%, whilst container decreased by 3 % . Wood shipments increased by 13% while fruit and liquid cargo is on the same level as in 2008.

The Port of Koper obtained a regulation (concession) from the Slovenian Government for 35 years, and in same time is working as Port Authority (speciality in EU). The port is also registered as a forwarder and a ships agent.

Our Association, supported by the Chamber of Commerce introduced a new 20 hour long course on ships agency to comply with the current licensing requirements and as a result of this programme some 33% of all those employed in shipping agency are now licensed.

Furthermore, we also finished a 6 year-long dialogue with the Slovenian anti-trust authorities and as a result have now withdrawn our tariffs and rewritten our Rules of Association and General Terms and Conditions.

We continue to discuss the Authorised Economic Operator concept with Slovenian Customs but little progress has been made to date.

Member Association Report — SOUTH AFRICA

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

Membership: 67

Contact: *Mr. A. Botha*

Lakeside Office Park, Derby Downs WESTVILLE 3630 South Africa

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e-mail: secretary@asabosa-asl.org

website:



Population: 49.1 Million

GDP 2007/8: US\$ 300.4 Billion

Total Volume of Exports 2007/8: US\$ 81.47 Billion

Total Volume of Imports 2007/8: US\$ 87.3 Billion

Principal Commodities Imported: Machinery, transport equipment, manufactured goods, chemicals, oil

Principal Commodities Exported: Gold, diamonds, platinum, other metals and minerals, foods, automotive components

Our association: 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 Authority, Transnet National Ports Authority, Transnet Freight Rail and other national government departments.

The South African Port System: Transnet, the state-owned enterprise operating ports, rail and pipelines, is undertaking an infrastructure investment programme aimed at building capacities in the South African port and rail network. Despite the economic downturn, Transnet is still investing heavily, albeit to a lesser degree, in each of its principal areas of operation within South Africa. Overall freight handled is forecast to grow from the current 740 Mtpa, to 2100 Mtpa over a 30-year period. Significant capital expenditure is to be channelled into increased container handling facilities, particularly within Durban (which includes the current construction of a much bigger entrance channel), Cape Town and Ngqura. The South African freight rail network is set to receive numerous efficiency upgrades and capacity expansions, particularly around the ports and inland terminal environs, with the hopes of attracting a greater market share of cargo back onto rail. The automotive industry remains a focus for investment, especially within East London and Port Elizabeth. Greater levels of investment are to also occur in bulk and breakbulk facilities, notably within Saldanha and Richards Bay.

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. All eyes are on Ngqura, set to begin operating on 1 October 2009, and signifying the biggest single increase in container handling capacity in South Africa, as part of a container hub strategy for South and Southern Africa. The possible establishment of a refinery is being considered in this Port as well. 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; the eThekweni Maritime Cluster. The Association is also part of 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. SAASOA was pleased to note the official opening of the National Port Regulator's offices, as it intends on furthering a number of issues with the Regulator which will lead to the reduction in the cost of doing business in South Africa and specifically within the maritime sector. Ties have been strengthened with the South African Maritime Safety Authority, which now has a much broader mandate within the maritime economy in terms of policy development, promotion of South African maritime interests on a global scale, security, job creation and skills development.

Renewed vigour is being shown in addressing the inefficiencies within the bulk and breakbulk handling facilities, particularly within Durban and Richards Bay, which have for some time suffered from lack of investment, maintenance and skilled personnel. Small but significant strides are being made towards restoring these terminals to their prior world-class status. SAASOA is also working closely together with Transnet Freight Rail to foster a culture which will see greater utilization of rail as a means of cargo transportation.

Various pieces of legislation have been produced which affect the maritime industry, particularly related to Customs and their modernization programme aimed at enhancing logistical and administration efficiencies via the use of electronic reporting procedures. The tonnage tax legislation is also being revisited with one of the goals being towards pursuing the establishment of a domestic fleet.

Member Association Report — SPAIN

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

Membership: 141

Contact: *Mr. J. Exposito Paradela*

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website:



Population:	40,525,002
GDP 2007/8:	US\$ 1.378 Trillion
Total Volume of Exports (2007/8):	US\$ 292.8 Billion
Total Volume of Imports (2007/8):	US\$ 444.9 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

ANESCO is working jointly with the National Institute of Qualifications (INCUAL), dependent of Ministry of Education and Science, for achieving some official formative itineraries for the adequate training of future professionals in shipping as well as for recycling of knowledge of current professionals.

Likewise, it has been a subject of special attention the parliamentary procedure of the Proposed General Law on Shipping, which will regulate, in the near future, the liability of Ship Agents, amongst other matters.

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 Association of Ship Agents of Barcelona imparted an Advanced Course on Shipping for training the workers of the sector.

The development and application of 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. This Association participated in the SIL (International Exhibition on Logistics) in Barcelona in June of 2009, and in January attended, as a guest, the General Assembly of AGEPOR (Ship Agents Association of Portugal), also participating the European Commission Coordinator for the Motorways of the Sea and the head of Maritime Transport, Ports and Maritime Safety Unit, Dimitrios Theologitis.

In February the Spanish Association for promotion of SSS, of which ANESCO is a member, attended a meeting with the Innovation Strategies team of the PLAT SSS project in order to define the cycle of events in the SSS Intermodal chain within the functional analysis for the electronic platform.

In March, said Association attended the Course MOST aboard a vessel of the European School of SSS, with pupils of advanced courses in Transport and Logistics from several Schools and Institutes of Lérida, Pamplona, Barcelona.

In April this Association also attended the meeting of ESN, Network of European centers for promotion of SSS, where it was decided to submit a Project to the Marco Polo II program, within the group of actions of Knowledge on E-freight, in which Acciona Trasmediterránea, UECC and the Ports of Bilbao, Barcelona and Valencia participated as well.

Member Association Report — SWEDEN

Association: *The Swedish Shipbrokers' Association*

Membership: 137

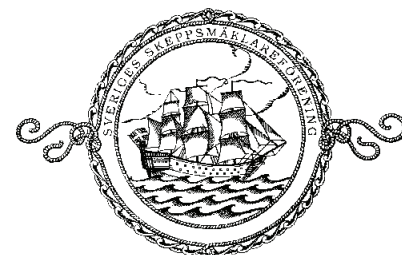
Contact: *Mrs. B. Blomqvist*

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Population: 9,059,651

GDP 2007/8: US\$ 512.9 Billion

Total Volume of Exports (2007/8): US\$ 185.1 Billion

Total Volume of Imports (2007/8): US\$ 166.6 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 and FQS

The Swedish Shipbrokers's Association has 137 members. 60 of them qualified for the Fonasba Quality Standard, FQS. We hope this should be a help to the principals to identify "quality agency providers", in Sweden and world wide.

Together with the Swedish Shipowner's Association we produced the magazine Vattenvägen, telling you all you need to know about Swedish shipping. The magazine will be distributed to the government, the parliament, high schools, ferry passengers and others. Edition: 30 000 copies.

Annual meting

We celebrated our 90th anniversary in a spring sunny Stockholm with 153 members and our FONASBA chairman as guest of honour. 10 members received a diploma for being faithful to the association since the start in 1919!

Even our autumn meeting in Gothenburg was well attended. That meeting had a formal agenda where we discussed the negotiation we have had with the Maritime Administration concerning the fact that we have to pay their fairway dues, regardless of if the ship owner pay us or not. We also discussed the Fonasba Quality Standard, the benefit of it and how to prove credibility and how to set up a separate client account.

Economy of the association

The economy is good within the association, due to our focus on education.

Developments within the industry

Of course we all suffer from the financial crises even though we actually have more members now than last year! The ship owning industry suffers also from the failure to get political approval of the tonnage tax system that has been promised for years. Now a lot of them abandon the Swedish flag and we are soon facing a surplus of seamen after years with a shortage.

Education

41 students registred for TutorShip, 27 enrolled for the exam and only 11 succeeded.

We have also focused on one day courses. We have had one in co-operation with ICS (Bill of Lading) and another developed by ourselves in Tanker Shipping.

Political decisions affecting the industry

We are very worried about the new IMO regulation to be implemented 2015, on reducing sulphur emission in SECA areas e.g. North Sea and Baltic Sea. Only! The nightmare is a shift back from sea to road, due to the higher costs for sea transport under the new legislation.

Member Association Report — UNITED STATES OF AMERICA

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

Membership: 189

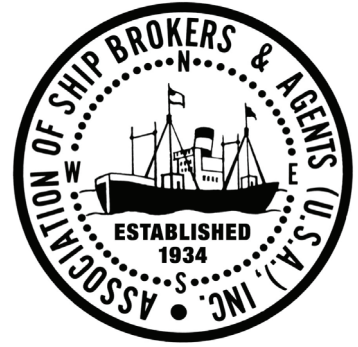
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Population:	307,212,123
GDP 2007/8	US\$ 14.26 Trillion
Total Volume of Exports (2007/8):	US\$ 1,37 Trillion
Total Volume of Imports (2007/8):	US\$ 2.19 Trillion
Principal Commodities Imported:	Agricultural products, industrial supplies, capital goods, 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 celebrated 75 years of service to the maritime industry with a Black Tie Gala on January 17, 2009 at Steiner Studios in the Brooklyn Navy Yard. The event was attended by 350 members and guests, who enjoyed an evening of dining and dancing in celebration of many years of excellent service to our members. We also released our 75th Anniversary Journal on this occasion, incorporating a history of the Association, photos of members past and present and well wishes from our sponsors as well as friends of the Association.

ASBA Agent Members, once again, completed their annual review for Agent Certification. Full details of our certification guidelines, a list of our certified members as well as contact information for our agents by the ports they serve are available on our website. This year ASBA agents were delighted to be awarded FONASBA's Quality Standard that embraces the same principals as our Guidelines. This indeed confirms the value of the certification to principals as they will be able to identify "quality agency providers" not just in the United States, but worldwide. ASBA and FONASBA will continue to work together to promote and encourage principals to appoint quality agents for hassle free port calls. Our ability to emphasize the quality of our agent members assisted in our recent rejection of allegations made in the maritime press by the DA-Desk accusing agents around the world of improper business practices. Both ASBA and FONASBA responded with Letters to the Editor in support of member agents.

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. Increased scrutiny of supply chain logistics by the government, in relation to heightened security at our seaports, has resulted in identifying ship agents as businesses of interest. The Senate Commerce Committee is considering legislation that would require ship agents to be licensed. ASBA is working with this Committee to ensure that any eventual licensing scheme meets the needs of both the U.S. Government and ASBA agents. We continue to benefit from participation in CIANAM and we expect that this organization will become a strong maritime voice for the Americas in the years to come. ASBA will host the VII Annual Meeting of CIANAM in April of 2010.

Our educational offerings have been well subscribed in 2008/2009. 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 2009. Next year we will be introducing our new one day "Live Agent Seminar", which will debut in New Orleans in January 2010.

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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