

THE FEDERATION OF  
NATIONAL ASSOCIATIONS OF SHIP  
BROKERS AND AGENTS



FONASBA



# FONASBA

ANNUAL  
REPORT

2009/10



*This report covers the activities of FONASBA, its committees and member associations during the period July 2009 to June 2010*

*Cover Photographs: Cape Town, South Africa, location for the 2009 Annual Meeting.*

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***INTRODUCTION***  
***By the President of FONASBA***  
***Tonny Dalhøej Paulsen***



Since last year's successful meeting in Cape Town, the demand for tonnage has fortunately increased in most segments and the predictions seem to give reasonable hope for a positive outlook for the maritime industry in the years to come.

My Presidency is coming to an end and during the second year I continued to attach great importance to meeting as many members and associations as possible. In the course of 2010, I had the privilege to meet a considerable number in both the Americas, the Middle East, the Far East and in Europe and on every occasion I have been very much encouraged by their positive comments on FONASBA's activities.

I also had the opportunity to represent FONASBA both at various events and conferences as well as at meetings with authorities and governmental bodies and it gives me much pleasure to report that without exception they consider FONASBA to be an excellent, loyal and reliable partner.

In the months and years to come, FONASBA will continue its efforts to raise our profile and visibility as well as to support our members and national ship agents and shipbrokers. One thing is certain however, it will be up to our sector itself to ensure that its contribution to the international maritime industry continues to achieve a higher and more positive public profile.

In the past year I have also had the pleasure of meeting a number of potential members, most recently travelling with Takazo Iigaki, our Regional Vice President for Asia to three associations in the Far East and I am delighted to have had such opportunities to contribute to bringing about one of FONASBA's goals, namely "ENHANCING GLOBAL REACH".

In this respect, I will take this opportunity to acknowledge the importance and value to FONASBA of the work carried out by our four Regional Vice Presidents (Aziz Mantrach in Africa, Patricio Campbell in the Americas, Takazo Iigaki in Asia and Gunnar J. Heinonen in Europe) in maintaining close and regular contact with present and potential members in their respective areas.

At present, FONASBA has 36 Full Members, 12 Associate and Candidate Members and 5 Club Members. Of those Full Members, 23 are also members of our European committee, ECASBA. These are respectable figures but, given the number of nations worldwide with a coastline, we have some way to go!

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*Continued from page 5*

One of our flagship projects was the creation of the FONASBA Quality Standard, which has been positively recognized by the industry. I am proud to advise that 215 companies have been accredited in 12 Member countries and several other associations are currently working to meet the criteria. After significant support for the initiative from the shipowning organisations, culminating in BIMCO's enthusiastic endorsement earlier this year, its international profile and value for the approved companies, has risen even higher.

Change is one of to-day's keywords and FONASBA wishes to plot its future course in accordance with the objectives of our members and in cooperation with other stakeholders. No doubt this will require new approaches to be taken in relation to the problems we face and innovative solutions will need to be found. These actions will be common to the entire shipping industry, as all sectors will be under pressure to respond to the major economic, geopolitical, technological and environmental forces that drive and underpin change.

Bearing in mind that FONASBA's aim is to "speak with authority on behalf of the shipping profession in so far as shipbrokers and agents are concerned, to promote fair and equitable practices in those professions, to co-operate with other international maritime bodies and to consult and advise on any matters of concern to the shipping industry", the concept of change must at all times be a vital factor in our actions and attitudes.

A federation like ours cannot be considered as a business, nor can international co-operation with 46 nations be compared with mergers or partnership between business partners. It is a homogenous grouping of sovereign associations, each with their own individual history and own distinctive character. This means that we have to adapt the speed of change to the slowest ship of the convoy but at the same time, we must not lose one ship when the convoy moves forward.

And forward is a must for FONASBA !

Finally, as my Presidency ends at the Council Meeting in Varna I would like to thank the Executive Committee and our General Manger, as well as all the members of FONASBA, for their support, encouragement and friendship over the last two years. I wish my successor as President all the very best for his term of office and of course confirm that he will have my fullest support at all times.

**TONNY DALHØEJ PAULSEN**  
**PRESIDENT**

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



The past year has been another busy and productive one for FONASBA. The Quality Standard continues to gain international recognition and expand its coverage, important initiatives such as e-Maritime and “Single Windows” are starting to develop into more than just concepts on paper, structural changes have taken place in the European Commission following the elections in June. Furthermore we have seen new members joining our Federation and enjoyed an extremely successful Annual Meeting in Cape Town.

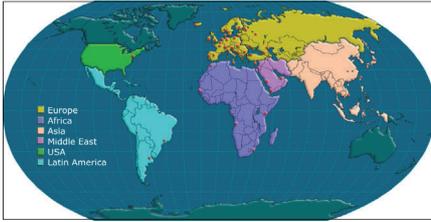
All of these issues will be covered in greater detail in the following pages but it is worthwhile just touching on a few of the topics in this introduction.

It is probably fair to say that e-Maritime and the “Single Window” concept have the potential to dramatically change the way the agency community operates. Although the use of enhanced electronic communication facilities, and the subsequent need to only input certain data once, will be welcomed with open arms by our members, there are a number of downsides as well. These will be discussed in full in the special report on e-Maritime and Single Windows on pages 17 and 18. Suffice to say, however, that FONASBA will be maintaining a very close watch on developments in Europe and at IMO in the coming months to ensure that the existing role of our members as coordinators of the port call and conduit for much of the information exchange between the vessel and shore (so in effect they are already acting as the port single window) is fully recognised and built in to any future legislation or procedures in this regard.

Our membership was significantly enhanced in September last year with the election to Full Membership of the China Association of Shipping Agencies and Non Vessel-Operating Common Carriers, CASA, and to Candidate Membership of the Philippine Ship Agent’s Association. Both associations are now active members of the Federation and their presence not only boosts our overall membership but also enhances our presence in the strategically vital Asian region. Although only elected to membership shortly before the 2009 Annual Meeting, both associations were present in Cape Town.

The Cape Town meeting, reported fully on pages 19 and 20, was an excellent event. The meetings were very well attended and the enthusiasm and passion which emerged during the Plenary Meetings resulted in the Chairmen having to cut short a number of the discussions in order to complete the agenda before the available time ran out! Whilst this did give some cause for concern, it was more than balanced by the level of engagement by the delegates. In order to avoid a similar situation arising in 2010, each of the Plenaries is being allotted a full day to allow time for a full exchange of views on all the topics being discussed. The presence of students from the Maritime Studies faculty of Simons Town School at two of the Plenary Meetings was a very welcome addition to the usual format of the event.

So, FONASBA moves into a new year full of enthusiasm, with a renewed sense of purpose and a reaffirmed commitment to carrying out the wishes and protecting the interests of our members.



## FONASBA MEMBERSHIP BY COUNTRY (at August 2010)

( 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

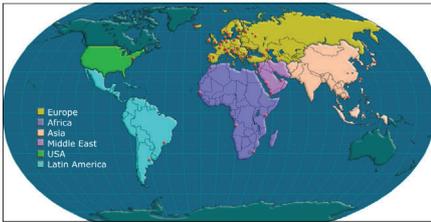
China	The China Association of Shipping Agencies and Non Vessel Operating Common Carriers (CASA) BEIJING
Japan	JAFSA, TOKYO
Mauritius (A)	MSCL Coraline, PORT LOUIS
Philippines (Cand.)	The Philippine Ship Agents Association MANILA

### 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



## FONASBA MEMBERSHIP BY COUNTRY (at August 2010)

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

### EUROPE contd..

Malta (A)	The Association of Ships Agents, VALETTA
Montenegro (A)	JADROAGENT, BAR
Netherlands (E)	ORAM, AMSTERDAM VRC, ROTTERDAM
Norway (E)	The Norwegian Shipbrokers Association, OSLO
Norway (C)	INTERTANKO, OSLO
Poland (E)	The Polish Shipbrokers Association, GDYNIA
Portugal (E)	AGEPOR, LISBON
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

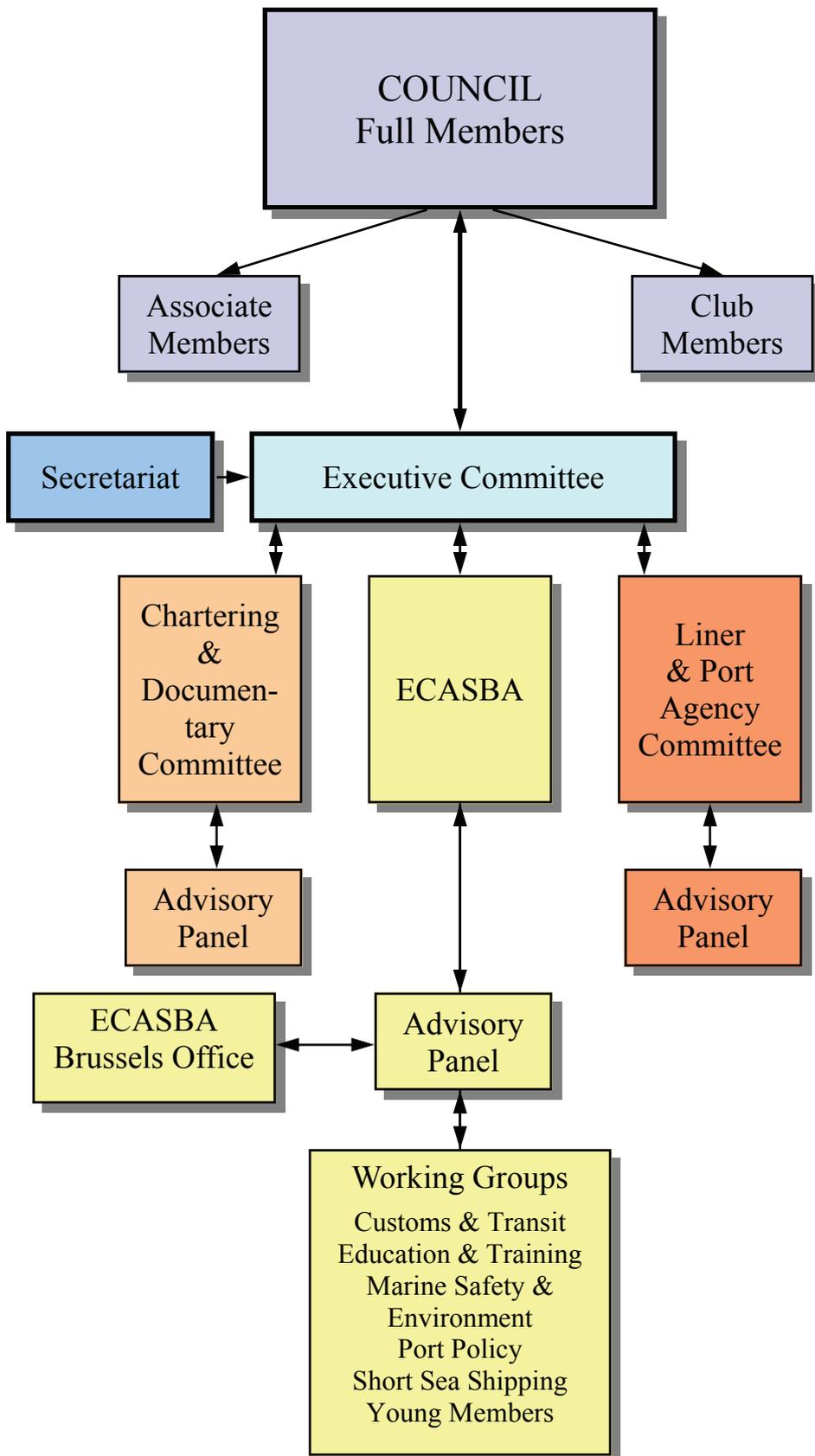
### CENTRAL & SOUTH AMERICA

Argentina	Centro de Navegación, BUENOS AIRES
Brazil	FENAMAR, SANTOS
Mexico	Asociación Mexicana de Agentes Navieros, A.C., MEXICO CITY
Peru	Asociación Peruana de Agentes Marítimos (APAM), LIMA
Uruguay (Cand.)	Centro de Navegación, MONTEVIDEO

### NORTH AMERICA

USA	The Association of Ship Brokers & Agents (USA) Inc., ENGLEWOOD CLIFFS
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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. Foord 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](http://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***



### **European Parliament Elections 2009**

As mentioned in my report last year, elections to the European Parliament took place in June 2009 and as expected these also brought about a number of changes in the European Commission.

Whilst the Commission President, Jose Manuel Barroso, was re-elected, a number of Commissioners relevant to ECASBA's activities changed. Existing Commissioners elected to new positions included Siim Kallas of Estonia who moved to Transport, Algirdas Semeta (Lithuania) who takes responsibility for Taxation and Customs Union and Janez Potočnik moved to Environment. Joe Borg, the veteran and experienced Maltese Commissioner for Maritime Affairs and Fisheries, who had developed and driven forward the ambitious Maritime Policy initiative, stepped down and was replaced by Maria Damanaki, a newly appointed Commissioner from Greece. Within the Commission itself, DG-TREN was split into its constituent parts, Energy and Transport, with the latter being renamed DG-MOVE (MO and VE being the first letters of the words mobility and transport in Flemish). Matthias Ruete, formerly Director-General of Transport, remained in post in MOVE and our colleagues Fotis Karamitsos and Dimitrios Theologitis retained broadly similar maritime transport and port policy related portfolios as Director of the redesignated Unit C and Head of Unit C2 respectively.

Aside from getting a new Commissioner, and the Unit designations being changed, DG-TAXUD remains relatively unchanged and our colleague Mrs. Cabral remains Head of Unit Customs Policy, albeit now titled Unit A instead of C as previously.

### **European Policy Actions**

Due to the extended period of political manoeuvring following the Parliamentary election and the subsequent delay in confirming the Commissioners, the "policy pause" that characterised the last few months of the old Parliament and Commission lasted into early 2010, with the result that no new policy initiatives have been introduced during the year under review. A number of pre-existing policies have, however, continued to develop and these are summarised in the following paragraphs.

#### **Policy Action – Transport**

e-Maritime is the current major project and ECASBA is fully engaged in dialogue with the Commission on this issue of vital importance to our members. Clearly any development that threatens to bring about a fundamental change to the way our agent members operate needs to receive ECASBA's closest attention.

Regular meetings and exchanges of correspondence with the Commission, and responses to consultations directed towards ensuring the agent remains the primary link between the ship and shore, in effect acting as the port single window, have in this case been supplemented by ECASBA's participation in the e-Maritime Group of Experts. This takes the form of a small group established by the Commission to provide up to date and relevant input on its initial proposals. The Group comprises representatives of a number of relevant organisations, all of whom are actively involved in the collection and transmission of port related data on a daily basis and ECASBA is represented by Jan-Willem van der Heul from VNC in the Netherlands. It meets twice a year and is tasked with ensuring that only proposals that are relevant, appropriate and workable are taken forward. Having such a filter in place at an early stage ensures that the development process remains firmly rooted in practical and commercial reality and is not hampered by theoretical and abstract concepts.

ECASBA was also fortunate enough to be invited by DG-MARE to host a workshop on the role of the agent as port single window during the 2010 European Maritime Day (EMD) event in Gijon. The workshop was very well attended, with some 60 EMD delegates being present, and the audience included senior Commission staff working on the e-Maritime project. Presentations by FONASBA President Tonny Paulsen, myself and General Manager Jonathan Williams were supplemented by colleagues from the Spanish port, shipping and agency communities.

As well as participating in the Commission's e-Maritime project, FONASBA is pursuing a parallel course of action within IMO which is also looking at the same issues. The Commission is also represented at IMO and it is therefore hoped this long-term project (the currently anticipated implementation date in Europe is 2020) will be based on internationally agreed standards rather than those specific to Europe.

*Continued on page 16*

***ANOTHER YEAR OF POSITIVE PROGRESS IN EUROPE***

*Continued from page 15*

A number of the elements of the Common European Maritime Space without Barriers project have been integrated into other initiatives including e-Maritime (for example enhancing communication between the ship and shore and the harmonisation of reporting requirements) and the modernisation of the Community Customs Code, for example the Authorised Economic Operator Concept.

Last year the European Maritime Safety Agency (EMSA) asked ECASBA to act as the central agency for disseminating information to the agency sector on its New Inspection Regime which from 1<sup>st</sup> January 2011 will change the methodology and criteria for carrying out Port State Control (PSC) inspections. The increased use of risk assessment information, which itself will be collated from a wider range of sources, will play an ever-increasing role in determining a vessel's risk category and thus the frequency of PSC inspections.

ECASBA continues to maintain a close interest in the development of short sea shipping and is represented on a number of Promotion Centres. Whilst the short sea operators continue to fight against unfair competition from road haulage and a significantly higher burden of regulatory compliance, the Promotion Centres themselves are still fighting to secure adequate funding to allow them to remain in operation. On numerous occasions ECASBA has called on the Commission to put in place a fair and balanced means of funding that meets the appropriate competition criteria and allows the Centres to devote their time and resources to overcoming the obstacles that still prevent short sea from maximising its contribution to European transport.

**Policy Action – Customs**

The Community Customs Code modernisation project continues to make slow but steady progress but it remains hampered by resistance from Member State Customs authorities that do not wish to see customs formalities streamlined or harmonised with a consequent loss of control and in many cases income. At the same time, trade (the European transport industries) are pressing for exactly the opposite, that is for outmoded systems to be replaced, the entire customs environment to be aligned with best practice in trade facilitation and for the internal market freedoms to be applied in all Member States.

Regrettably trade has, in the past few months, become extremely disillusioned with the commitment of DG-TAXUD, and more importantly Member States, to open and frank discussions with trade on the modernisation project. Concern has been expressed by the industry members of the Trade Contact Group (ECASBA included) that TAXUD is failing to consult with trade or to listen to its legitimate concerns, to work on the "lowest common denominator" principle (that is basing decisions on the slowest, least effective methods operating within the Community) rather than encouraging all Member States to work to the "highest common multiple" and adopt best practice. As an example, rather than adopt the best simplification procedures currently available, TAXUD appears to be proposing that under the Modernised Customs Code Implementation Procedures (MCCIP) all simplifications will be withdrawn, a move that will put the customs procedures in some Member States back decades.

Another trade concern is that new systems are being forced to meet politically motivated deadlines that do not take into account the ability of trade to implement the necessary changes in advance. The issues that have arisen from the introduction of the Import and Export Control Systems, for example, have more than adequately demonstrated that the timescales forced on trade and Member States under the legislation are insufficient to allow for a smooth and effective implementation. The main concern of course are the operational issues which will arise when the Modernised Customs Code is implemented on 1<sup>st</sup> January 2013. ECASBA has been active in supporting the TCG in calling for this and other unrealistic deadlines to be put back to allow all parties to reach binding agreement on technical standards, operating procedures and other matters sufficiently far in advance to allow same to be implemented in an orderly fashion across the Community.

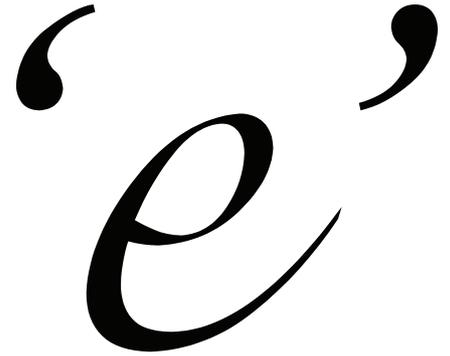
**Policy Action – Environment/Climate Change**

Although ECASBA is not directly involved in environmental issues, it recently supported the European shipowners association (ECSA) and others in calling for the mandatory introduction of a limit of 01.% sulphur in marine fuel used in the North Sea and Baltic Sea Environmental Control Areas (ECAs) from 2015 to be delayed pending further research into alternative means of achieving the same result. Whilst fully supporting reductions in sulphur emissions, ECASBA and its colleague associations are concerned that the high price of very low sulphur fuels will have a serious impact on the ability of short sea shipping in these regions to compete with road haulage. As a consequence it is feared that the measure will bring about a return to widespread use of road haulage (modal backshift), with the unintended result that overall atmospheric pollution will increase.

From all of the above you will see that ECASBA has enjoyed another very busy and, we hope, ultimately productive year. I would therefore like to thank all my colleagues in the Advisory Panel and the Working Groups, our General Manager and everyone else that has contributed to ECASBA's work over the past year for their help, support and input. I have no doubt the coming year will be as busy as this one and I hope that as a team we can continue making good progress on the issues that confront us.

## ***e-MARITIME AND SINGLE WINDOWS — THREAT OR OPPORTUNITY?***

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



The phrase “Single Window” is increasingly being used, in our industry at least, to describe a methodology for enhancing and streamlining the exchange of information between the ship and shore. The concept has been around for some time but tangible progress towards bringing it to life seemed to be getting nowhere until last year, when the European Commission unveiled the e-Maritime project – which includes Single Windows – and IMO started a parallel project within its FAL Committee.

As the party responsible for handling the majority of the communication between the ship and shore, these initiatives have the potential to bring about some of the biggest changes to the ship agency sector since the invention of the mobile phone or the laptop. It is therefore perhaps opportune to take a look at what is being proposed, how both initiatives might affect our agent members and to consider the future actions to be taken by FONASBA in order that the agency community can best benefit from the “Single Window” concept.

It has always been a function of the ship agent’s daily task to provide the same basic information to a number of shore based authorities. For example the ship name/type, port/date/time of arrival, flag state, master’s name, certificate of registry data, IMO number, gross and nett tonnage are common to all IMO FAL forms - most of which need to be lodged with different parties – and similar combinations of the same data are required for almost every other report to the statutory authorities and other recipients. The duplication of effort – and the potential for mistakes – is therefore considerable.

Both of the current “Single Window” projects aim to provide a single portal through which all the relevant information can be fed - once and once only - and it is then distributed electronically and seamlessly to all the parties that require it. The successful introduction of the single window would therefore be of major benefit to the ship agent in that a significant volume of unnecessarily repetitive work would no longer be required and he or she could spend more time on other, more productive, activities that make better use of his or her time, as well as skills, knowledge and experience.

On paper, therefore, the concept is excellent and has much to recommend itself to the agency community and so FONASBA supports the overall aims of both the IMO and European initiatives. Having said that, however, a number of issues of profound importance to our members begin to arise when we start looking further into the detail.

One of the first issues is the need to recognise that the agent currently acts as a port single window between the ship and the shore. As stated above, almost all communication between the vessel and shore-based authorities, contractors and other service providers is effected via the agent and this ensures a coordinated approach and effective communication by passing the relevant information to the appropriate party at the right time. Additionally, and although the vessel remains at all times responsible for the accuracy of the information provided, the agent will review the information he is passing on and if necessary query any inconsistencies or errors that come to his attention. He will also provide a specific point of contact for all the other parties in the communication chain in case of queries being raised at any time.

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***e-MARITIME AND SINGLE WINDOWS — THREAT OR OPPORTUNITY?***

*Continued from page 17*

Another issue is the need to ensure that the e-Maritime/Single Windows promoters recognise that although statutory information forms a significant proportion of the volume of information exchanged during a port call, there is also a considerable quantity of commercial and operational data exchanged, much of which is sensitive or confidential. Self-evidently, this information should be included in the e-Maritime/single Window project (as leaving it out will defeat the primary objective of the exercise) but at the same time appropriate and adequate safeguards must be put in place to ensure that confidentiality can be guaranteed at all times.

Concern has also been expressed by our members at the apparent intention in the draft European legislation to allow third parties, other than the vessel, owners and the agent (directly or via port community systems), to input information to the authorities through the single window. As well as the clearly justified concerns about the security and accuracy of the information being provided, this would appear to go completely against one of the guiding principals of the project; that is to streamline the information flow and we are unsure how opening this up to external suppliers will achieve the desired effect

We are also rather mystified as to why there is talk, again in Europe, of having more than one national Single Window in each member state, presumably with each handling different aspects of the information exchange. From our perspective, it is not unreasonable to expect the word “Single” to mean one, and one only, so we are confused as to how a group of windows – each, presumably, covering a different reporting requirement, can justify the definition “Single Window”, or indeed bring any about improvement in the current situation.

It is possible that this latter situation arises from a realisation that the sheer volume of data, both statutory and commercial, that will need to be handled on a daily basis may overwhelm the ability of the available technology to handle it. Connectivity between national systems, development of appropriate data exchange standards and the need to incorporate the existing and very efficient data networks operated by major liner shipping companies and port community systems are all issues that need urgent resolution before the project can make tangible progress. It is therefore perhaps not too surprising that the European Commission is looking at a 2020 implementation date for its project!

Until such time as the myriad difficulties are overcome, FONASBA, ECASBA and our member associations will continue to monitor developments, provide constructive and relevant input where appropriate and ensure that at all times the vital role of the ship agent in the effective and efficient exchange of information between the ship and shore is fully recognised. To this end, FONASBA tabled an information paper on the agent’s role at the 36<sup>th</sup> meeting of IMO’s Facilitation Committee in early September and is already represented on, and playing an active role in, the European Commission’s e-Maritime panel of experts.

There is a long way to go and many issues to resolve before these projects become reality but FONASBA is ready for the long haul in meeting the challenge and contributing positively to the successful development of an effective and efficient system.

## FONASBA ANNUAL MEETING 2009

For the second time in three years FONASBA went into the southern hemisphere for its 2009 Annual Meeting, returning again to Cape Town, previously host city for the 1995 Meeting.

Ninety-nine delegates and partners joined representatives of the host association, the South African Association of Ship Operators and Agents, SAASOA, in the magnificent Table Bay Hotel in the Victoria and Alfred Waterfront area of the city for an excellent meeting and social programme.

During the Welcome Reception, FONASBA President Tonny D. Paulsen greeted all the delegates and their partners, and gave a particular welcome to representatives of FONASBA's newest member associations, the China Association of Shipping Agents and Non-Vessel Operating Common Carriers, CASA, a Full Member, and the Philippine Ship Agents Association, elected a Candidate member.

As is now traditional, the meeting programme opened the following day with the Plenary Meeting of FONASBA's European Committee, **ECASBA** and Chairman Antonio Belmar da Costa opened proceedings with a summary of the main issues reviewed by the ECASBA Working Groups (WG) in the past year. These included the increasing requirement for high level, and high quality, education and training in the workforce, an issue given even greater prominence in recent months because of the specific requirements enshrined in the FONASBA Quality Standard. There is also need to develop an holistic approach to port policy issues in the light of the European Commission's move in the same direction and the necessity to ensure that progress, particularly in terms of streamlining and harmonising procedures, continues to be made to better enable short sea shipping to compete on equal terms with other transport modes. Customs & Transit remained a major area of interest to ECASBA but the sheer volume of information being issued by the Commission's Directorate General for Taxation and Customs Union (DG-TAXUD) threatened to overwhelm the Working Group. All ECASBA associations were therefore asked to support the Group and enable it to ensure that the views of the agency and broking communities were heard amongst those of other organisations, whose views may not necessarily coincide with those of ECASBA.

These reports were followed by General Manager Jonathan C. Williams FICS, who provided a detailed analysis of Commission action over the twelve months leading up to the Meeting and by ECASBA Brussels representative Diego Teurelinx who looked ahead to the coming year. The meeting also discussed issues as diverse as the need to insert unique (MRN) code numbers into electronic customs declarations and the inadequate timeframe allowed for performing veterinary checks on transshipment cargo.

The following day saw the Plenary Meetings of the Chartering & Documentary and Liner & Port Agency Committees.

The **Chartering & Documentary** Plenary began with market report presentations with the Chairman, Marygrace Collins, covering the bulk sector, Philip Wood FICS covering tankers, Rodolfo Garcia Piñero the container market, Luciano Oliviera da Silva reported on the rapidly growing cruise market in his home country of Brazil and Committee Vice Chairman Botond Szalma rounded up the reports with a summary of the state of river transportation in Europe.

Andrew Jamieson, Claims Director of FONASBA Club Member ITIC then give a detailed résumé of some of the issues that were giving rise to claims from the broking community, many of which had increased in frequency following the collapse of the freight market. These included a steep rise in the number of commission claims resulting from the early cancellation of timecharters, the significant reduction in the number of valuations being carried out and the dangers of brokers making statements regarding the standing, financial or otherwise, of principals. Mr. Jamieson said that with the market seeing a rise in the number of bankruptcies and liquidations, a party that suffered as a result of such an action could seek an opportunity to mitigate its losses and claim compensation.

*Continued on page 20*

## FONASBA ANNUAL MEETING 2009 contd./...

*Continued from page 19*

Any unsubstantiated statements made by a broker during the negotiations could therefore provide an opportunity for a claim to be made. In the same vein, Mr. Jamieson said that brokers should be extremely wary of accepting guarantees that were not made in writing and linked to the terms of the charterparty.

With the Rotterdam Rules having come to prominence in the period leading up to the Meeting, General Manager Jonathan Williams made a short presentation in which he highlighted the main provisions of the draft convention that would impact on the agency and broking community.

Reports on the work of BIMCO and INTERTANKO's Documentary Committees were also provided, as was a brief report on the "Rightship" vetting process.

One particularly noteworthy aspect of both the Chartering & Documentary and Liner & Port Agency Plenary Meetings was the presence at both meetings of groups of students from the School of Maritime Studies based at Simons' Town School, located on the Cape Peninsular south of Cape Town. Their interest in the subjects being discussed, and enthusiasm for the shipping industry in general, made a very favourable impression on the delegates and they proved excellent ambassadors for their school. The C&D Plenary therefore ended with the principal of the school, Brian Ingpen, making a very interesting presentation on the school's work with students, often from under-privileged backgrounds, and which also highlighted the wide variety of employment gained by former students of the faculty.

Representatives of FONASBA's range committees, CIANAM, covering the Americas, Far East, Mediterranean & Black Sea and Nordic areas and the two agency sector Working Groups, Liner and Port & Tanker, opened the **Liner & Port Agency** Plenary by reporting on their activities during the previous year.

The meeting also discussed the impact of third party financial service providers on the agency sector and the ongoing work in IMO to formalise and standardise the procedures for disposal of ship generated waste.

The main topic of the meeting, however, was the unveiling of the FONASBA Port Procedures Survey, initiated by Brazil and introduced by the Chairman of the Liner & Port Agency Committee Glen Gordon Findlay. This ambitious exercise aims to codify and analyse the wide range of procedures undertaken by the agent during a port call. A number of organisations, including the European Commission, are attempting to harmonise and streamline these procedures at national and/or regional level and the FONASBA exercise will prove valuable in assisting in these exercises. As stated at the meeting, the data collected will prove beyond any reasonable doubt that not only is there no consistency across regions but in many cases there is none across individual member states either! Furthermore, and with more than 130 separate actions listed, the aggregated results will more than adequately demonstrate the breadth of the agent's role and the complexity of the task undertaken on behalf of the principal.

As ever, the meeting ended with the Council Meeting. As well as undertaking those functions necessary for the administration of the Federation, the meeting discussed the ongoing expansion of FONASBA's membership coverage. The role of the Regional Vice Presidents in this process and the prospects for bringing new associations into membership was also discussed, as was attendance at the Annual Meeting, relationships with other industry organisations and an update on the 2011 Annual Meeting in Varna. Shipping Australia then made a presentation proposing Sydney as the venue for the 2010 Annual Meeting. This presentation was very well received and the meeting unanimously endorsed the proposal to hold the meeting in Sydney.

The 2009 Annual Meeting ended with an excursion to the Aquila Private Game Reserve, where delegates and partners enjoyed very close encounters with elephant, rhino, giraffe, zebra and hippo and also travelled through the lion enclosure –the inhabitants of which fortunately remained at a reassuring distance!

## ***EXTERNAL RELATIONS: COOPERATION WITH OTHER INDUSTRY BODIES***

As the issues confronting the maritime industry get more and more complex, covering subjects that cut across traditional sector boundaries, so the organisations set up to represent those sectors, FONASBA included, must seek to broaden their horizons in order to continue to provide the levels of service, expertise and guidance their members require.

Some organisations do so by expanding their own operations, bringing in expertise from outside and expanding their operational portfolio. Others take the same route but achieve their aims by merging with colleague organisations. A third way, adopted by FONASBA, is to seek to establish alliances with other sector organisations and to cooperate on specific issues for the benefit of all the members concerned.

Just as the port agent, in his or her daily work, is in contact with a wide variety of statutory authorities, port service providers and others, so FONASBA works closely with the national, regional and international policy makers and the organisations representing those same parties.

At the statutory level, FONASBA, and its European committee ECASBA, enjoy consultative status with the International Maritime Organisation (IMO), World Customs Organisation (WCO) and the United Nations Conference on Trade and Development (UNCTAD) as well as with the European Commission and, through its member associations, with national governments and authorities. In the case of the United Nations bodies (IMO, WCO, UNCTAD), it operates in a technical advisory role, providing input to working and correspondence groups. Through these activities, FONASBA seeks to ensure that proposed legislation is based on current best practice and is applied appropriately and effectively in the port and maritime environment.

The same aims drive ECASBA's relations with the European Commission. ECASBA is primarily engaged in dialogue with DG-MOVE (transport) DG-TAXUD (customs) and DG-MARE (Maritime policy) but it will also establish lines of communication with any other Directorate-General whose policy actions extend to the maritime sector. ECASBA is also a member of the European Maritime Industries Forum.

In both the international and European legislative environments, FONASBA and ECASBA also work closely with other associations on issues of mutual interest. These include shipowner associations such as BIMCO, INTERTANKO (both of whom have reciprocal membership status with FONASBA) and Intercargo and the European shipowners association ECSA. In the European port sector, ECASBA works with ESPO, the port authority organisation and FEPORT, representing terminal operators. FONASBA also cooperates closely with the Baltic Exchange, industry insurer ITIC and the Shipbrokers' Register, publisher of the world-renowned directory of ship agents and brokers. All three are also Club members of FONASBA, which is also a member of the Baltic Exchange. ECASBA is also in regular contact with CLECAT, the European freight forwarders organisation and the European Shippers Council.

The regional agents and brokers committee for the Americas, CIANAM, has within its membership both FONASBA members (Argentina, Brazil, Mexico, Peru, the USA and Uruguay) and other local associations (Chile, Panama, Paraguay and Venezuela). CIANAM's primary role is to support the member associations in their negotiations with local authorities but additionally it acts as liaison with FONASBA on issues specific to the region.



# 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 2008/9:	US\$ 548.8 Billion
Total Volume of Exports (2008/9):	US\$ 55.75 Billion
Total Volume of Imports (2008/9):	US\$ 37.13 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 still one of the largest exporters of grains, vegeils and by products with a high volume notwithstanding several conflicts with the government due to export taxes. 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 1,7 million TEU this year. After the World Crisis we expect to recover the volume of containers before the crisis in the short term.

#### Port Situation

With almost 4725 Km. of Atlantic coastline, it is clear that Argentina has a variety of ports. The Paraná-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 vegeil exports in San Lorenzo, Rosario, Necochea and Bahía Blanca. Citrus: San Pedro and Campana. Fruits: San Antonio Oeste. Frozen fish: the southern ports. Oil: La Plata, Dock Sud, Campana, Bahía Blanca. General Cargo: Zárate, Campana, Dock Sud. Cruise Activities, Buenos Aires, Puerto Madryn, Mar del Plata and Ushuaia. We expect around 140 Cruise Vessels for the 2010-2011 Season.

#### Port Investment

There are usually many private investments in the port system. Argentina continues the strategy to establish their ports as leaders in the grain and vegeil trades. Despite the good harvests and trade improvement, due to the conflicts between Farmers and Government some investments have been reduced or delayed. On the contrary, this year we expect a new Port Terminal in Buenos Aires for Cruise Vessels. The new Container Terminal in La Plata Port (Tecplata S.A.) is expected to start its construction, with the subsequent reduction of costs and less transit time for Container Vessels when finished.

#### Activities in CIANAM

Centro de Navegación maintains strong participation in the regional chamber CIANAM and held the secretariat working and giving full support to the new President Waldemar Rocha from FENAMAR (Brazilian Association). This year the annual meeting of CIANAM was held in Washington DC (U.S.A).

#### 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. The Education Centre also offers many new short courses to keep our sector informed and updated. At the end of this year we will issue the new edition of the River Plate Shipping Guide, our 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 already certified seven Maritime Agencies with the FONASBA QUALITY STANDARD in Argentina. We expect that there will be more in the near future as we encourage our members to apply for it.

#### Miscellaneous

In 2010 in our country we celebrated our 200th Anniversary of Argentina as a Nation with a lot of events. This year is the 110th anniversary of our association.

## Member Association Report — AUSTRALIA

Association: *Shipping Australia Ltd.*  
 Membership: 39 (full), 43 associate  
 Contact: Mr. Llew Russell  
 Level 6, 131, York Street SYDNEY NSW 2000 Australia  
 Tel: (612) 9266 9900 Fax: (612) 9268 0230  
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 website: [www.shippingaustralia.com](http://www.shippingaustralia.com)



Population:	21,515,754
GDP 2008/9	US\$ 824.3 Billion
Total Volume of Exports (2008/9):	US\$ 160.5 Billion
Total Volume of Imports (2008/9):	US\$ 163.9 Billion
Principal Commodities Imported:	Computers and office machines, telecommunications equipment, crude oil and petroleum products, machinery and transport equipment
Principal Commodities Exported:	Iron ore, coal, wheat, gold, alumina, meat, wool, machinery and transport equipment

Many of the policy issues commented upon in last year's report continued into this year, particularly the proposed revitalisation of the Australian merchant marine but the Federal Government report is still awaited.

The application of Australia's industrial award conditions to foreign vessels carrying coastal cargo under permit issued by the Federal Government where no Australian licensed vessel is available to carry such cargo continues. SAL along with the shippers involved continue to argue against this impost.

Mention was made last year of the oil spill by the *Pacific Adventurer* off the Queensland coast in March 2009 and on 7 July this year the master and shipping company involved were committed to stand trial on criminal charges. SAL is concerned that they will not receive a fair trial given the media coverage. The whole of the shipping industry is helping to pay for clean-up costs over the next five years by a substantial increase in the oil pollution levy. Within the IMO, Australia is seeking support from other signatories to significantly increase the limits in the Limitation of Liability for Maritime Claims Convention.

The Government has embarked on a major rewrite of the Australian Navigation Act, 1912 which underpins the regulations implemented by the Australian Maritime Safety Authority and its Port State control activities.

Along with the association Tradegate, SAL has developed a national dangerous goods reporting system and as well trials to improve the transparency of information regarding the activities of empty container parks to significantly improve their efficiency.

SAL has also been involved in many other issues involving the Maritime Security Identification Card and dealing with mass gatherings of people, particularly at cruise passenger terminals. Many maritime crew visas need to be renewed before the end of this year and any seaman arriving in Australia without a visa will liable to a fine which will initially be levied on the shipping agent. SAL has continued to liaise closely with the border agencies, in particular the Australian Quarantine Inspection Service and Customs and Border Protection, and has been active in the development of a new port development strategy. The Government's promotion of anti-piracy measures has also had SAL support.

Finally, as mentioned last year SAL continues to have concerns regarding the new vessel arrival system that has been introduced for coal vessels calling at Newcastle.

## 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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BRAZIL*

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*website: www.fenamar.com.br*



Population:	198,000.000
GDP 2008/9:	US\$ 1.77 Trillion
Total Volume of Exports (2008/9):	US\$ 153 Billion
Total Volume of Imports (2008/9):	US\$ 128 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 Projects**

→ The Brazilian Navy presented in March 2010 the software developed by FENAMAR, which will provide electronic clearance to all vessels calling Brazilian Ports. The program is now receiving some final adjustments and is expected to go live still in 2010.

→ Brazilian Ship Agent Day – This year we had the second celebration of the date and we are glad to report that the event has grown considerably in importance, with more Harbor Masters adhering to the event and promoting special celebrations at the respective ports, inviting local Authorities, etc, certainly making Agents workers all over Brazil very proud.

→ FENAMAR Quality Label – By August 2010, 35 Shipping Agencies in Brazil were certified by FENAMAR to use the Quality Label of FENAMAR and FONASBA.

→ In 2010 FENAMAR was again officially invited to participate in one more Brazilian Government Port Mission, this time to Germany, to discuss matters related to Ports infra-structure and Logistics.

→ FENAMAR continues participating in the development of the project “Paperless Port”, aiming to set a “Portal” to integrate all the information transmitted by the Ship Agents.

→ FENAMAR was elected for the Presidency of CIANAM for the period 2010-2012, during the General Assembly held at Washington/USA last May.

→ FENAMAR’s Service provider continues to offer considerable savings to the Ship Agents - Since 2004 total savings of US\$ 1.1 million (and in the last 12 months US\$ 440,000.00) were generated through EDI files transmissions.

With regards to Brazilian Federal Government, FENAMAR was invited to participate and express 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.

In the last twelve months FENAMAR held meetings with the Ministry of the Ports, Port Health Authorities and Waterborne Transportation Agency, where we had the opportunity to discuss many important issues with direct impact in the Agency business, particularly in relation to fines imposed to the Agents due to infractions occurred on board of vessels. In this connection, FENAMAR has finally won a Court case against the Port Health Authorities prohibiting them issuing such fines against the vessels’ agents. FENAMAR also won another Court case, this time against the Federal Police (Immigration) Authorities, stopping them from charging a so-called “annual inspection fee” which was being applied to the Agents.

Finally, FENAMAR continues to work very hard aiming at modifying some important Law projects, presently under discussion by the Federal Government and the Congress, such as Cruise Vessels Tax Regulation, Special Visa for Foreign Shipping Technicians (Immigration Law), Control of Import Cargo by the vessel’s Agents (Delivery order), among others.

## Member Association Report — BULGARIA

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

Membership: 51

Contact: *Mr. I. Demirov*

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Population:	7,204,687
GDP 2008/9:	US\$ 47.1 Billion
Total Volume of Exports (2008/9):	US\$ 16.43 Billion
Total Volume of Imports (2008/9):	US\$ 22.1 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.

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 trans-shipment 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.

BASBA is proud to host the 2010 FONASBA Annual Meeting in Varna and we hope that this will lead to increased awareness and recognition of the role of the ship broker and ship agent in Bulgaria and act as a catalyst for enhanced cooperation between the national associations representing these sectors around the Black Sea.

## Member Association Report — CROATIA

Association: *The Association of Maritime Agents of Croatia*

Membership: 23

Contact: *Mr. M. Tudor*

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Population:	4,486,881
GDP 2008/9:	US\$ 79.21 Billion
Total Volume of Exports (2008/9):	US\$ 10.26 Billion
Total Volume of Imports (2008/9):	US\$ 21.00 Billion
Principal Commodities Imported:	Consumer goods, electrical equipment, chemicals
Principal Commodities Exported:	Transport equipment, textiles, foodstuffs

Major Croatian Ports opened for international traffic: Rijeka, Ploce, Split, Dubrovnik, Zadar, Sibenik and Pula.

Major Croatian Shipyards located at: Pula, Rijeka and Split.

In consideration of Croatia's status as a candidate country for membership in the EU and the required compliance with the accession criteria and adoption and implementation of the *acquis*, the Association has added to the dynamics of its activities through active participation in a number of public institutions. During 2009, we have taken part in several projects:

- identification of bottlenecks in intermodal transport
- port reception facilities study
- Adriatic VTMIS
- NCTS and customs transit procedures.

Within the programme of permanent education, we have organized three lectures held by highly recognized professionals:

- specific features of shipping agents' accountancy
- shipping agent between the hammer and the anvil (the D/A problem)
- intervening and crisis management in sudden environmental pollution of the sea – with particular focus on shipping agent's role.

Our Association enjoys membership in the Croatian Maritime Law Association, with active participation in conventions.

We are proud of our good partner-to-partner relationship with institutions such as: the Ministry of the Sea, Port Authorities, Customs, Maritime Police, Harbour Masters' Offices, and the Faculty of Shipping .

The Association organised its own project entitled "THE BEST AGENT AWARD", aimed at promoting shipping agents' professionalism and a high level of service rendered to principals and further at rewarding the individual of particular merits earned in exercising shipping agent's duties in special situations (sick crew members and passengers, repatriation), in saving lives and recovering property at sea, in protection of the marine environment, and the like.

In our Plan for 2010, the Association will make progress in the different fields, the most important are:

- ASBAC will promote the FONASBA Quality Standard in order that major part of the members achieve Quality Label,
- to become member of Croatian Intermodal Cluster,
- to continue with permanent education,
- to continue project „Best Agent Award“,
- to re-design the website.

## Member Association Report — CYPRUS

Association: *The Cyprus Shipping Association*  
 Membership: 35  
 Contact: *Mr. E. Kouzapas*  
*P.O. Box 50529, CY-3606 LIMASSOL, Cyprus*  
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*website: www.csa-cy.org*



Population:	Approximately 1,000,000 including foreign labour
GDP 2008/9:	US\$ 23.0 Billion
Total Volume of Exports (2008/9):	US\$ 2.0 Billion
Total Volume of Imports (2008/9):	US\$ 8.5 Billion
Principal Commodities Imported:	Consumer goods, petroleum and lubricants, intermediate goods, machinery, transport equipment, foodstuffs, fertilisers and chemicals
Principal Commodities Exported:	Agricultural and light industrial products, pharmaceuticals, cement and minerals

The Cyprus Shipping Association (CSA) remains interested and actively involved, in all matters concerning the Cyprus Port Industry and related activities.

#### **1. Upgrading and expansion of Limassol Port**

Two Panamax cranes have not yet been transferred from Larnaca Port. International tenders for the 500 m. container quay extension, for two Post-Panamax gantries, the construction of the new passenger terminal and for a new 60 ton BP tug are to be launched.

#### **2. The other Cyprus Ports**

The Government and the strategic investor are concluding negotiations for the transformation of the Larnaca Port and Marina into a modern passenger hub under the FBOT system. A project for the construction of an Industrial Port and Gas Terminal at Vassilikos will be presented to the public soon.

#### **3. Upgrading of the Port and Customs Electronic Systems**

Customs and Port Authorities (CPA) have upgraded their respective electronic systems ahead of introduction of the risk assessment analysis of goods through EU Ports as from 2011. Our Association organized special seminars for the Members on the subject.

#### **4. Authorized Economic Operator (AEO)**

Cyprus Customs continue to encourage ship agents to obtain AEO status. Some shipowners have requested their local agents to obtain the AEO certificate and many members have applied. CSA assists member agents with their preparation to become AEO.

#### **5. Security Charge at Cyprus Ports**

The CPA was forced to postpone the implementation of the security charge because of strong opposition by the private sector.

#### **6. The new labour force at Cyprus Ports**

After the successful transition, the CSA's affiliate, United Stevedoring Company, manages and coordinates the port labour. Special emphasis is given to increasing productivity through continuing training and discipline.

#### **7. Collection of ship generated waste and cargo residues according to the EU Directive.**

CPA prepared a study resulting in the implementation of new forms and documents to facilitate reporting. Collection charges remained unchanged.

#### **8. Shortlanded goods at Cyprus Ports**

Despite the apparent failure to resolve this serious problem from "above" the CSA remains committed to its members and shall continue its efforts in all directions. The CSA firmly believes that ECASBA's efforts towards TAXUD should be intensified.

#### **9. Education**

The CSA continues to organize educational seminars and to encourage its members to enrol all new employees in the course 'Understanding Shipping' provided by the Cyprus Branch of ICS since 2000.

#### **10. Short Sea Shipping**

The CSSSC shall be transformed into a semi private entity financially supported by its members. This development is expected to improve its services and allow it to fulfil its role more efficiently and effectively. The CSA supports this effort and is directly involved in this development.

#### **11. VAT**

The CSA has organized meetings with the Cyprus VAT authorities to assist members in the implementation as from 01/01/2010 of EU Council Directive 2008/8/EC concerning the introduction of Services to the VAT Information Exchange System (VIES).

## Member Association Report — DENMARK

Association: *The Danish Shipbrokers Association*

Membership: 110

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*website: www.shipbrokers.dk*



Population:	5,515,575
GDP 2008/9:	US\$ 198.6 Billion
Total Volume of Exports (2008/9):	US\$ 91.49 Billion
Total Volume of Imports (2008/9):	US\$ 84.74 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

The Danish Shipbrokers' Association has 110 members and 29 branches. Since last year we have entered 6 new members but lost several due to cost cutting, closures etc. The economy of the association is under heavy pressure as the main revenue is from membership fees and education and both have gone down drastically.

#### General Shipping Climate

SLOW to DEAD SLOW is unfortunately a proper description of Danish shipping at present. All sectors are under severe pressure and there is a very strong focus on cost cutting. Danish shipping companies operate a fleet of more than 50 mio. DWT and in late 2009 orders for about 275 newbuildings totalling 11 mio. DWT and a value of US\$ 10 billions were in place. 7 % of the world tonnage is operated from Denmark and Danish shipping companies control transportation of 10 % of world cargo.

#### Ports and Infrastructure

Danish infrastructure is getting more and more congested. Most ports are owned and controlled by the local municipality and in several ports the local municipality seems to favour transforming commercial port-areas to recreational purposes, offices or accommodation. This has a damaging influence on efforts to transfer cargo from road to sea. It is expected that the law covering the public ports will be reviewed by the government in the near future. The ports argue that they should have even less restrictions in the future.

#### Various new rules and regulations

The new EU-rules regarding reporting/collection of VAT have caused a lot of headaches and are expected to be a burden for many importers and exporters in the future. Visa-requirements under Schengen rules are complicated and change all the time. Unfortunately the police do not have the manpower to enforce compliance and it is left to the port agents to ensure proper reporting. On 6<sup>th</sup> July 2010 the EU Commission adopted new Reporting formalities for ships arriving in or departing from ports. We are strong supporters of the rules but also a little worried about article 4, which states " ...Member States shall ensure that the master or any other person duly authorised by the operator of the ship provides notification ..." It is not clear from the text what "any other person" really covers.

#### 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. The Annual General Meeting was held in late September .

#### Education

Education is still given high priority. The shipping education is still considered excellent and there is a good cooperation with the Shipowners' Association and Business College West. Unfortunately there seems to be a reduction in the number of trainees mainly due to the difficult financial times. The Danish Shipbrokers' Association is Distance Learning Centre for The Institute of Chartered Shipbrokers. Furthermore, a four-days course in Maritime Law was held during the autumn 2009.

## Member Association Report — FINLAND

Association: *The Finnish Shipbrokers Association*

Membership: 70

Contact: *Mr. S. Lomberg*

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*website: www.shipbrokers.fi*



Population:	5.3 million
GDP 2008/9:	US\$ 274 Billion
Total Volume of Imports (2008/9):	US\$ 87.51 Billion
Total Volume of Exports (2008/9):	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

Finnish trade has seen a recovery in recent months. The turning point was in May when both exports and imports reached levels some 25 pct higher than those of the previous year. For example cargo volumes thru Helsinki port grew some 15 pct during first half 2010 and closing up to 2008 pre-recession levels. During the same period the amount of ferry passengers also increased by 7 pct.

During the recession the transit volumes via Finland to Russia dropped drastically. Because of the Russian political objective to direct their foreign trade cargoes thru their own ports this trade is not expected to recover to earlier levels. Another reason is the increased competition from other ports within the eastern part of the Baltic Sea. Within the Finnish shipping sector it is commonly felt that the drastic decline in transportations by sea has come to an end and the upward turn of the market has begun. During the remaining year majority of Finnish shipowners expect a slight improve to their turnover.

The Government has approved the revision of the Finnish tonnage tax and it is intended to come into effect soonest but currently awaits approval from the European Commission as a revision of subsidies is involved. In general domestic shipowners welcome the revision. Thus hopefully the fleet of vessel flying Finnish flag will eventually increase.

As mentioned last year a great cause of concern remains the new IMO regulations, to be implemented 2015, on reducing sulphur emissions within the SECA areas and their effect on future sea transportation within the Baltic. Bunker costs for vessels will increase and will most probably thereby also the freight rates. The logistic costs for Finnish trade and industry are already now higher than those of the competitors and so 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.

The Finnish Shipbrokers' Association celebrated its 90th Anniversary in Helsinki 11th March. At the Annual Meeting Jan Vikström was elected new Chairman succeeding Eero Holma. The meeting was followed by a gala dinner and dancing with some 100 participants. The dance music was delivered by a 21 person Big Band.

The activities of the Association led by the Chairman has proceeded as planned and are summarised as follows:

- Law on Fairway Dues: In May the EU Commission informed us that they do not endorse our view that the revised law on Fairway Dues altered 2009, does not comply in full with the EU legislation. We did not argue to the contrary and thus the Commission closed the pending procedure.
- Restitution of the Fairway Dues: Court has now ruled in favor of the Customs interpretation that the time bar for restitutions is 2005. This ruling widely astonished shipping lawyers.
- The revised Pilot Act came into force beginning August. Pilotage will not be opened for competition and the state owned piloting company "Finnpilot" remains the exclusive operator of this activity.
- Further the English language will be accepted as basis for granting pilot license. We are pleased that this issue which we have promoted for years now will be put into practice.
- Finnish Customs ruled their new electronic exit declarations comprising MNR numbers mandatory in Finland as of beginning May this year, the first EU member state to do so. Corresponding import declarations become mandatory as of January 2011.
- Since last year we lost three but gained two new members. The number of members is now 70 and we have one application for membership is on the table. The economy of the Association is as budgeted and based on the membership fee only.

## Member Association Report — FRANCE

Association: *AMCF*

Membership: *142*

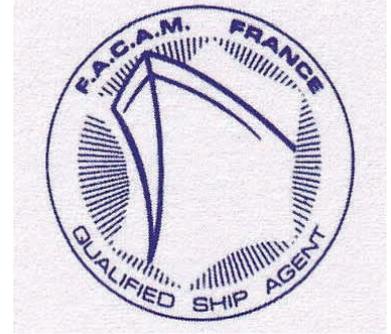
Contact: *Mr. Ch. BELE*

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*website:*



Population:	64.7 million
GDP 2008/9:	US\$ 2.740 Trillion
Total Volume of Exports (2008/9):	US\$ 4.56.8 Billion
Total Volume of Imports (2008/9):	US\$ 532.2 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

The financial crisis had a severe 2009 impacted on the port sector. The port reforms that came into force in July 2008 introduced a very hard social climate and ports have suffered many stoppages and strikes.

In the meantime, the seven public ports (previously “Port Autonomes” now renamed “Grand Ports Maritimes”) had to elaborate a “strategic plan” covering five years (2009 to 2013). These plans are following governmental decisions to promote the national ports.

In this context, our Federation kept a close eye on the above mentioned reform in each port, including the transfer to private stevedoring companies of public equipment (cranes) and labourers.

FACAM was also interested in observing how the ISPS security plans were declined in the various French ports.

The 0.1% sulphur directive has been another matter.

Our Federation has been involved in the evolution of customs procedures (ECS, ICS) by several contacts with the Customs head department.

Several local shipagent associations have raised the matter regarding the crew change visa procedure.

FACAM has taken every opportunity to make the case that the agent is a vital link in the exchange of information between ship and shore, and to make the profession officially recognized by the French authorities.

Regarding costs, no significant changes occurred in main tariffs this year. However this item will still be closely followed by our Federation in order to avoid that present economic situation together with the financial needs of ports in the reform context 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 2008/9:	US\$ 2.81 Trillion
Total Volume of Exports (2008/9):	US\$ 1.159 Trillion
Total Volume of Imports (2008/9):	US\$ 966.9 Billion
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 10 local shipbrokers' associations, (Hamburg (2), Bremen (2), Flensburg, Schleswig-Holstein, Rostock, Emden, Wilhelmshaven and Duisburg, representing a total of about 400 member companies. This year the Kiel and Lübeck Shipbrokers' Associations merged to form a single Schleswig-Holstein Shipbrokers' Association and the Stuttgart Shipbrokers' Association disbanded.

2009 and a part of 2010 are regarded as a period of crisis in almost all sectors of shipping, as the freight rates and charter rates did not reach a reasonable level. It was only towards the end of 2010 that the market gradually began to recover.

ZVDS therefore negotiated with all service providers in port to obtain adjustment of prices and rates to the crisis situation, and at the same time to ensure that the necessary investments are not postponed. Both of these goals were achieved, at least in the most important points.

A number of further education opportunities were made available for training in the shipping business. Young people who go into shipping can now take a special course at the Hamburg Vocational Training School to earn the title Bachelor of Shipping Trade and Transport.

The ConTex index, published twice weekly since 2007 to give up-to-date estimates of charter rates for container ships, was expanded from 3 to 6 types of ship, and renamed "New ConTex". At present the New ConTex is compiled from data coming from 17 companies as panellists; they are based in Hamburg, London, Paris and Asia-Pacific (see website [www.vhss.de](http://www.vhss.de)).

As every year, the Hamburg Shipbrokers' Association organised the traditional Eisbeisessen again in 2009, at which the partner country was Norway. Due to the crisis in shipping, the number of participants was down about 10%. This year the number of visitors is expected to be up again. The partner country for 2010 is Turkey.

## Member Association Report — GREAT BRITAIN

Association: *The Institute of Chartered Shipbrokers*

Membership: 108

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Population:	61,284,806
GDP 2008/9:	US\$ 2.224 Trillion
Total Volume of Exports (2008/9):	US\$ 357.3 Billion
Total Volume of Imports (2008/9):	US\$ 486.00 Billion
Principal Commodities Imported:	Fuel, Manufactured Goods, Food
Principal Commodities Exported:	Fuel, Chemicals, Manufactured Goods, Food, Beverages

The maritime industry is vital to the economy of the United Kingdom, where approximately 95% of the UK's international trade in goods travels by sea and the combined net overseas earnings of maritime services and shipping is worth around £2.5 billion per year. The nation's ports are vital gateways for UK trade which supports 500,000 jobs and is estimated to account for around £25 billion of the UK's Gross Domestic Product.

The City of London is the world's leading maritime centre, controlling about one fifth of the world fleet, and overseas owners with agencies in the UK sustain more than 4,500 City jobs including shipping law, banking and insurance. The United Nations International Maritime Organization (IMO) is based in London.

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 4,000 individual and over 100 Company Members.

With 24 branches and 16 distance learning centres around the world, the members of ICS are part of an internationally recognised network of shipping professionals who not only work towards high professional ethical standards of trust, but who also have proven knowledge, competence and understanding of the broad spectrum of shipping business.

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 and the Department for Transport (DfT) among others.

Through our active involvement with Maritime UK comprising the Baltic Exchange, British Ports Association, the Chamber of Shipping, Maritime London, the Passenger Shipping Association and the UK Major Ports Group, Federation Council has been instrumental in raising the profile of matters affecting the UK maritime sector.

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.

Federation Council continues to promote FONASBA's Quality Standard among its Company Members and it is pleasing to report that, from the companies approved to use the QS mark, all of the UK's ports have representation.

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 2010.

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 2009.

For further information on the Institute of Chartered Shipbrokers, Federation Council and its Committees, please visit our website at [www.ics.org.uk](http://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 2008/9:	US\$ 129.4 Billion
Total Volume of Exports (2008/9):	US\$ 82.49 Billion
Total Volume of Imports (2008/9):	US\$ 75.93 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 global economic downturn, declining exports, and low domestic consumption and fixed asset accumulation, dampened by government austerity measures, resulted in an economic contraction of 6.7% in 2009. Hungary's impending inability to service its short-term debt - brought on by the global financial crisis in late 2008 - led the government to seek and receive an IMF-arranged financial assistance package worth over \$25 billion.

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

In addition to its membership of FONASBA and ECASBA, the "Hungarian Shipbrokers and Shipping Agents Association" continues to be a full member of the MVVLSZ (Hungarian Rail-, Water- and Airtransport Association). The Association consists of 10 members in total (7 companies and 3 private persons only) which is the minimum number to keep the Association legally 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 2009/2010 the management of our Association continued the efforts to convince the managements of the local offices of the shipping lines and the local shipping agents - who are not yet members of the Association - 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 there is practically no political and governmental/administrative support for inland navigation. Unfortunately there was no improvement at all during 2009/2010 on the "NAIADES" project of the European Commission which was supposed to assist the development of the European waterways, including the Danube. The Association regularly attended the respective meetings and contributed to the common attitude of the Hungarian civil organizations to the EU Commission's European Danube Region Strategy (EDRS).

As in previous 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: 34

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Member of FONASBA

Population	4,203,200
GDP 2008/9:	US\$ 188.4 Billion
Total Volume of Exports (2008/9):	US\$ 119.6 Billion
Total Volume of Imports (2008/9):	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](http://www.irishshipagents.com)) has 34 member companies operating out of every port in the Irish Republic. The Association benefits from having 'Consultancy' status with the Irish Department of Transport and enjoys a strong working relationship with the Irish Maritime Development Office ([www.imdo.ie](http://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 again this past year by the global downturn in the economy however shipping data indicates signs of traffic recovery. The latest analysis of 2010 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 2010. However the overall volume of traffic handled at ports on the island continued to decline over the first 6 months of 2010 compared to the same period in 2009.

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 2010. However despite the lobbying of our Association and other shipping groups the Dept. of Transport did increase the cost of Light Dues and the number of voyages for which a vessel must pay remains at 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 Varna and wish all members every success.

## 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, 619,600
GDP 2008/9:	US\$ 194.8 Billion
Total Volume of Exports (2008/9):	US\$ 48.1 Billion
Total Volume of Imports (2008/9):	US\$ 46.9 Billion
Principal Commodities Imported:	Consumer goods, raw materials, investment goods, fuels, diamonds, ships and aircraft
Principal Commodities Exported:	Agricultural products, manufactured goods, diamonds

- Global recession had its impact on the Israeli economy but with a very minor effect.
- By 2010 volumes of cargo and ships calls were increased and the economy is back on the right track again.
- During 2009 Israeli Ports handled about 35 million tons of cargo (excluding oil & coal in bulk).
- Bulk cargo handled was about 3.7 million tons, 14% decrease compared with the previous year (out of which 68% were handled in Ashdod).
- 155, 000 cars & trucks were discharged (40% decrease compared with previous year), 47% out of it in Eilat Port.
- 380,000 passengers arrived by 2009, 27% increase compared with previous year.
- Containers traffic remained as by 2008 (about 2 million TEU).
- Israel continued to import mainly from Europe, East Med, Far East and North America.
- Major destinations for Israeli Export were Europe, East Med and North America.

#### PORT TARIFF

A new port tariff will be implemented by the 01/10/2010 in all Israeli ports. This new tariff includes dramatic increases in port dues (mainly affecting small & medium size vessels) and in cargo handling for almost all types of cargo and containers.

The new tariff is, however, a "maximum" one and so open the option for negotiating with the port companies.

#### PORTS

A new container pier (750 meter length) is going to be operational in Haifa (HaCarmel pier) by the end of 2010 with 6 gantry cranes and 15.50 metres draft alongside.

#### LEGISLATION

The Government of Israel has approved, as part of the Budget Law, a motion out of the Economic Arrangements Bill for the years 2011-2012. In short, this motion is amending the Antitrust Law and cancelling all arrangements and exemptions for the Shipping Industry in Israel, including consortia agreements.

When approved by the Parliament the law will come into force as from the 01/07/11.

This motion was forwarded by our members to their principals asking those among them who seemed themselves to be harmed by it to appeal to the Israeli Authorities and express their objection and reservation.

#### 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: 570

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Population:	60,380,912
GDP 2008/9:	US\$ 2.221 Trillion
Total Volume of Exports (2008/9):	US\$ 417.2 Billion
Total Volume of Imports (2008/9):	US\$ 419.5 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

During 2009 Federagenti has effected a number of important actions and new projects under the Chairmanship of Filippo Gallo, who was elected in 2008.

Keeping in strict relationship with General Directors of Italian Ministry of Infrastructure and Transports, Federagenti has been very busy in receiving the EU Directive n. 2006/123, CE (the Bolkenstein Directive) on Market Services liberalization. It is now expected the reception of this Directive in Italy, with some amendments to our present regulations, such as the cancellation of the local residence requirement to act as a port agent, but retaining the need for two years experience in the industry and an examination to be passed in order to act as professional ship agent or shipbroker (for shipbrokers there will be no need for an approved list to kept by the Chamber of Commerce, but entry to profession will be allowed only be granted to those that can comply with the minimum experience and examination conditions.

Our Federation has been proactive part in a number of meetings on reforms of Italian law on Ports and Shipping Services (Law 84/94) and lobbied for the introduction of specific new rules on all Port Services, including services to the ship. These new rules have been agreed between all parties and are expected to be implemented during 2010.

Federagenti has promoted lobbied the Government in an attempt to cancel, or at least to postpone, the costs increases on light dues and port fees on cargoes. This action has also been successful and it has been agreed that in early 2010 a Decree will be issued to allow individual port authorities to decrease light dues on ships calling their ports.

Federagenti has been extremely careful to keep port services costs under control and, together with all other categories of port users, this has being constantly monitored, with specific attention to towage costs.

Our activity on education and training has been continuous and careful. We held videoconference courses under the co-ordination of the Ente Bilaterale Nazionale (A body created between Federagenti and the main workers unions) together with the Institute of Chartered Shipbrokers in London. We have registered a very good attendance at the courses organized for students aiming to get the Foundation Diploma.

The very important "EGO Project" for Good Governance got to the first main target in 2009: after two years of work, we have seen the certification of the first Italian company. Many other companies are now working on the Project to obtain the EGO Certificate.

The work and activity developed by Federagenti, as Entrepreneurial Category Association in port services and the maritime industry, have reconfirmed and tightened a continuous co-operation with our government, with the administration, with other categories Associations, with Workers' Unions. Our presence with our own representatives in the National Committee for Seamen Welfare, in Federazione del Mare (the Italian Federation that brings together the most influential organizations in the Italian shipping industry) as well as in Confcommercio (the national trading association) has granted us a rising image in the country.

Our Yacht Committee has been working with a strong support of Federagenti and is presently developing a great work on national and international basis, being leading actor in the present and future scenarios.

Our Young Ship Agents Group continues to expand with new branches, as well as in becoming more and more a working point, developing education, events and aggregation, with many dedicated people working on our territory to improve its activity. The Young Group Federagenti is now not only well known in Italy and in the Industry, but also outside our field and our borders.

During 2009 Federagenti has continuously co-operated with our Headquarters Coast Guard (Comando Generale delle Capitanerie di Porto) to develop the PMIS project, which will keep constant connection between all port authorities, coast guard offices and port agents to arrange all ships arrival and departure procedures through it. The software is presently completed and under trials to proceed then with distribution to all involved parties.

## Member Association Report — JAPAN

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

Membership: 114

Contact: Mr. E. Itoh

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website: [www.jafsa.jp](http://www.jafsa.jp)



Population	127,000,000
GDP 2008/9:	US\$ 5.170 Trillion
Total Volume of Exports (2008/9):	US\$ 786.43 Billion
Total Volume of Imports (2008/9):	US\$ 762.57 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 over the past year to encourage staff members to improve their professional knowledge. This included holding three Seminars, two hands-on voyage simulation sessions, and a port study tour. All of these events were free of charge. In addition we are continually trying our to secure new members.

JAFSA also undertook the following activities:

- Monthly Board Meetings
- Issuing “JAFSA News” monthly in Japanese, with copies to all members, government offices, other relevant associations and local port authorities.
- Distributing to our members all notices and other useful information which were issued/prepared by Government and or public organizations.
- A study tour to the port of Yokohama from the sea in mid May 2009.
- Providing experience of navigation (off Tokyo Bay to Yokohama) using NYK’s simulator in July 2009.
- Hosting a seminar at the end of July 2009 about Revised Law of “New Port Traffic Control System” and “the Law for Preventing Collisions at Sea” by Mr. Furukawa, an officer of the Japanese Coast Guard.
- After the seminar, we held a Customary “Beer Party”
- As in previous years, the JAFSA Golf competition was held in October 2009
- Mr. Itoh (JAFSA Secretary General) gave a seminar about “Shipping Practice Part 2” in mid November 2009.
- The JAFSA Annual General Meeting took place in Jan. 2010.
- Hosted a seminar about “the Piracy off Somali” by Mr. M. Yamazaki, Commentator of Crisis.

JAFSA was represented on several governments 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 Runaway at Hamada International Airport
- Maintaining Safe Navigation in Port of Tokyo while reclaiming land from the sea
- Safe Navigation and Maritime Disaster Prevention Committee for the Sakhalin Project at North Hokkaido
- Model Study Committee for Safe Navigation in Semi-congested Areas, such as off Tokyo, Ise and Osaka Bays.
- Safe Operation committee for Large LNG vessels (210,000~260,000 M<sup>3</sup> capacity)

## Member Association Report — MEXICO

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

Membership: 61

Contact: *Roberto Luna Serrano*

*Nueva Jersey No. 14, Col. Napoles C.P. 03810 MEXICO CITY, Mexico*

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Population:	112.4 Million
GDP 2008/9:	US\$ 1.482 Trillion
Total Volume of Exports (2008/9):	US\$ 229.7 Billion
Total Volume of Imports (2008/9):	US\$ 234.4 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.

Today, AMANAC represents 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.

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

Services are offered equally to international cargo agents, which allows AMANAC an opportunity for consolidation within the sector as a backbone of support and defend the interests of our country's maritime industry.

#### AMANAC Projects

##### Achievements

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

- During 2009 we managed to secure rate discounts on the following services for our membership:
  - Towage and pilotage services,
  - Port dues
  - Railroad and Multimodal Terminal services.
- Regarding port facilitation, we were able to convince the port authority to eliminate six documents required for authorization of arrival and departure of cruise ships.

##### In progress

- Introducing a Validated Electronic Delivery Order issued by the agent's carrier used to release consignee's cargo.
- Development of electronic processes used by ship agents to submit cruise ship passenger and crew manifests to immigration authority upon arrival and departure.
- Developing of AMANAC's quality criteria leading to implementation of the FONASBA Quality Standard among AMANAC members,
- AMANAC is working closely with the Mexican immigration authorities to achieve greater simplification of immigration procedures in the arrival and departure of cruise ships to as a means of incentivising this very important sector.

## Member Association Report — MOROCCO

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

Membership: 60

Contact: *Mr. A. El Glaoui—President*

*219, Bd des FAR. CASABLANCA 20 000, Morocco*

*Tel: (2122) 254 1112 Fax: (2122) 254 1415*

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*website: www.apram.ma*



Population:	32,000,000
GDP 2008/9 :	US\$ 90.82 Billion
Total Volume of Exports (2008/9):	US\$ 14.75 Billion
Total Volume of Imports (2008/9):	US\$ 31.22 Billion
Principal Commodities Imported:	Crude petroleum, textile fabric, telecommunications equipment, wheat, gas and electricity, transistors, plastics
Principal Commodities Exported:	Clothing, fish, inorganic chemicals, transistors, crude minerals, fertilizers (including phosphates), petroleum products, fruits, vegetables

#### **APRAM Annual General Assembly:**

The statutory annual assembly took place on 25 March 2010. Activities during 2008 and 2009 were reported and approved. Mr Abdelhamid EL GLAOUÏ was re-elected as President, Mr Mohamed KABBAJ and Mr Mohamed LOUARAKI as Vice-Presidents, with Mr Nasser FILALI as General Secretary and Mr Rachid Sami TASSI as Treasurer.

#### **Harbour Activities in Casablanca:**

A third terminal with a capacity of about 500,000 TEU will start operating by the end of 2010 or early 2011 which will increase the port capacity to 1,500,000 TEU. In 2009 the general traffic in Moroccan ports registered a decrease of about -17% in comparison with 2008. This is reflecting the worldwide financial crisis.

#### **Agency / Brokers Regulations:**

APRAM is still in negotiation with the Merchant Marine Administration about the forthcoming regulation of the activity and requirements of ship agents and brokers.

#### **Containers in transit:**

Containers are allowed to remain in a temporary import regime for 6 months. Our Association enhanced this regime by introducing a procedure by which our members, supported by association, benefit from enhanced cooperation with the custom authorities and in particular avoids the need to provide bail or financial guaranties. Members are therefore only require on a monthly basis to advise and report to the custom administration the situation of the imported containers and their export (full or empty).

#### **FONASBA Quality Standards:**

In compliance with the FONASBA Quality Standards, APRAM is preparing a by-law draft to be submitted for adoption in the near future.

#### **Professional civil liability insurance:**

A dedicated commission is working on the presentation of a professional civil liability insurance facility for all the association members. It is expected that by January 2011, a suitable policy will be achieved for the benefits of all.

#### **Exchange control facilities:**

After several meetings last year with Exchange Control Administration, the association succeeded in securing constructive facilities in respect of the establishment and presentation of the ship agencies disbursement account and particularly funds transfer flexibility regarding freight collected, commission, demurrages.

APRAM is becoming ever more closely involved with, and is regularly consulted by, regulatory authorities and others in recognition of the ship agent’s important and crucial role within the shipping industry, the ports environment and the national economy.

#### **Membership:**

The association membership currently stands at 60.

## Member Association Report — VRC, NETHERLANDS

Association: *Vereniging van Rotterdamse Cargadoors (VRC)*

Membership: 106

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

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*website: www.shipagents.nl*



Population:	16,500,000
GDP 2008/9:	US\$ 653.2 Billion
Total Volume of Exports (2008/9)	US\$ 397.6 Billion
Total Volume of Imports (2008/9)	US\$ 358.9 Billion
Principal Commodities Imported:	Containers, crude oil, break bulk and chemicals
Principal Commodities Exported:	Machinery and equipment, chemicals, fuels, foodstuffs and containers

VRC continues to establish a strong yet positive profile for the Port of Rotterdam region. While VRC's 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, attractive to all users. Achieving this demands intensive contact between all concerned parties in the port. These contacts already exist and include industry, the government and fellow trade associations.

After a difficult 2009, there are signs of a modest upturn in the market. In the course of the year stabilization of the economy and stock markets turned into a weak recovery. We are in the process of climbing out of the recession, and we are aiming to do so with more vigour than before. It would obviously be convenient if the global economy and trade were always on a rising trend. But periods of recession have advantages in that they remind everyone that cargo flows cannot be taken for granted and of the need for effort and the creation of new approaches.

There have been changes in the logistics chains themselves. The influence on the structure of the goods flows exerted by major international logistics service providers and shippers is increasing. They think in terms of logistics chains that comprise networks of ports, hinterland connections and hinterland terminals. What is important now is less the port of choice but rather the logistics chain of choice.

We invest time and money in assets that will benefit both the government and industrial partners. However, as a sector we have to observe that many of the financial burdens fall on us as shipping agents, which surely cannot have been what was intended. One of the key themes in the forthcoming period must therefore be the elimination of this inequality.

VRC recognizes the great importance of educational programmes and training courses in upholding the level of knowledge in the shipbrokers' profession. On the one hand high quality services must be provided in order to fulfil agreements and satisfy the expectations of the clients, specifically shippers and principals. On the other hand it is important to be able to offer young people sound and interesting training in order to guarantee shipping agents of a future influx of new employees.

One of VRC's priorities for 2010 is to harmonize policy with a view to raising young people's interest in jobs in the port. This means enhanced coordination and targeting of all expenditure for marketing, advertising and promotion of work in the port. Research has shown that it is possible to stimulate young people's enthusiasm for jobs in a port company only if education about the port is a compulsory part of the secondary school curriculum. VRC is taking steps to have an obligation of this kind introduced, at any rate in the Rotterdam region.

#### **VRC Youth board**

VRC, through the PR image committee, is giving considerable attention to the external image of the shipbroking profession and to internal communication with its members. The aim with the internal communication is to assure VRC's future. In order to achieve this aim, one of the VRC board's resolutions is to create a VRC Youth board, for which candidates are now being selected.

'Who has the youth, has the future' definitely applies to VRC, as the youth of today will be the successors of the current 'establishment'. The 'VRC Youth board', like the VRC board itself, must have representatives from each shipbroking segment and each with an individual specialization, in containers, ro-ro, breakbulk, wet/dry bulk, general cargo, projects, heavy lift, etc..

Details of the specific duties of the 'VRC Youth board' have yet to be worked out, but basically they will have to think about the same problems that confront the VRC board daily. The 'VRC Youth board' will have no power of decision, but its recommendations will be given serious consideration in the resolutions of the VRC board.

#### **ANCV 2009 - Revised General Netherlands Shipping Agents Conditions come into force in October 2009**

The new 'General Netherlands Shipping Agents Conditions' (ANCV 2009) came into force on 1 October 2009. These replace the 1992 conditions. During the past 18 months our working group has developed a new draft of the shipping agents' conditions, intended to strengthen shipping agents' position in the business relationship with third parties. Dutch and the English versions of the new conditions have also been posted on the VRC website ([www.shipagents.nl](http://www.shipagents.nl)).

## Member Association Report — NORWAY

Association: *Norwegian Shipbrokers' Association*

Membership: 135

Contact: *Mr. K.F. Eriksen*

*Fr. Nansens Plass 9 0160 OSLO, Norway*

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Population:	4,873,000
GDP 2008/9:	US\$ 419 Billion
Total Volume of Exports (2008/9):	US\$ 175 Billion
Total Volume of Imports (2008/9):	US\$ 114 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 135 member companies, a reduction of 6 since last year.

### Activities

Our members use the association to get help and advice in various matters of a professional nature. This is done by our various sub-committees, our legal consultant and the administration of our association. We work closely with other maritime organisations to promote the shipping interests in Norway, which this year resulted in co-location our office with other maritime associations including Bulkforum and the Oslo Ship Owners' Association.

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 NO<sup>x</sup>-tax which the government introduced from January 1<sup>st</sup> 2007 has been on our agenda also this year. Foreign ship owners have to pay this tax through a Norwegian representative and this representative is jointly responsible for the payment of the tax. We recommended our members to be cautious before possibly getting involved in this and as a consequence hardly any foreign ship owners pay this tax. Joint responsibility between ship owners and agents has also been introduced in relation to other fees payable by ship owners, another matter that is of great concern.

We have adopted the FONASBA Quality Standard, after having had our procedures for certification approved by FONASBA, and are now marketing this to our members and other parties.

### Norwegian shipping

As of January 1<sup>st</sup> 2010 the Norwegian controlled fleet totalled 40.4 million dwt, a decrease of 3% since January 1<sup>st</sup> 2009. The total number of ships is 1,836, and of these 46 % fly the Norwegian flag, which is down 2% since January 1<sup>st</sup> 2009.

Building orders of ships for Norwegian account decreased to 224 as of January 1<sup>st</sup> 2010, of these 108 ships were off shore service vessels (65 built at Norwegian yards). In addition 14 mobile offshore units were on order as of 1<sup>st</sup> January 2009, all of them being built in Asia. The total value of ships and rigs on order for Norwegian account is NOK 125,7 billion (USD 21 billion). This year Chinese yards accounted for the largest number of vessels on order from Norwegian shipping companies with 74 ships. Norway ranked second with 65 ships, followed by South Korea with 27 ships, India with 15 ships, Vietnam with 12 ships and Spain with 9 ships.

This past year there has been no political decision that affects the shipping industry in general. However, the Government lost the case in the Supreme Court with regards to the tonnage tax system rules for moving from the old system to the new system which was found to be unconstitutional. As a result the earlier rules were suspended and new rules put in place. This means that the total taxation for ship owners was reduced from NOK 21 billion to NOK 4 billion when the old tonnage tax system was replaced with a new one. This seem to be accepted by the ship owners, however one ship owner has sued the Government for extra costs (financing) incurred as a result of the rules being found unconstitutional by the Supreme Court. If this suit is successful, more lawsuits can be expected.

## Member Association Report — PERU

Association: *Asociación Peruana de Agentes Marítimos (APAM)*

Membership: 57

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Population:	29,885,340
GDP 2008/9:	US\$ 193,155 Billion
Total Volume of Exports (2008/9):	US\$ 26,885 Billion
Total Volume of Imports (2008/9):	US\$ 21,011 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

The Peruvian Association of Maritime Agents (APAM, in Spanish) is a business union that groups Peru's maritime agencies in the maritime, fluvial and lacustrine ports. Currently there are 36 Maritime Agencies unionized to APAM. The union has active presence in a number of different Sector Committees and Advisory Councils created to deal with maritime, port and customs problems. Its role is actively defending the interests of the members before different state entities such as the Judicial Power. It successfully handles illegalities, bureaucratic obstacles and extra costs affecting the operation of associated companies. These actions benefit the Foreign Trade of Peru. APAM's influence on such issues is reflected in the formulation of proposals beneficial to its members. These proposals are also supported by other business unions. Furthermore, the continuous and permanent presence of APAM's President, in written and television means, has seen him develop into an opinion former on matters of relevance to our sector.

### Relevant Actions 2009 – 2010

An administrative claim was put before INDECOPI against the National Port Authority (APN, in Spanish), because it has been charging for reception and shipment procedures and the claim was upheld by Resolution N° 0114-2009/CEB-INDECOPI on June 18 2009, based on the fact that their actions constituted an Illegal BUREAUCRATIC BARRIER. As a direct consequence of said resolution, the rates of vessels reception and shipment will not apply to the agencies starting this action and this includes APAM members.

By Resolution N° 0784-2009/SC1-INDECOPI on August 3rd 2009, APAM filed a second complaint APN, stating that the demand for personal accident policies to be enforced workers in stacking and unstacking companies constituted an **ILLEGAL BUREAUCRATIC BARRIER**

Between March 2009 and March 2010, APAM has provided specialized training to 513 workers among officers and technical staff belonging to foreign trade operators such as maritime agencies, storage terminals and logistics operators.

Aware of the potential danger to the development of the maritime Agents and stacking and unstacking companies activities, on two occasions recently (both regarding the Concession of the Paita Port Terminal) we have suggested that the Government review the following matters included in the concession contract: Qualification of New Infrastructure, Cost Increase to Foreign Trade, Investment Conditioned to the Loading Movement and the Business Risk assumed by the State.

Likewise, regarding the North Terminal concession, APAM has strongly questioned the design of the infrastructure and equipment, and in particular the reduction in the number of slips from 15 to 7, the monopoly over operation of the multipurpose docks and also in relation to all the services provided at the dock. Furthermore, we have questioned the absence of a Master Plan, the modernization of dock N° 5 to receive containerised loads and recommended that docks 1,2,4 and 11 continue as multipurpose docks in free competence is.

### FONASBA's International Support

The provisions of Legislative Decree N° 1022 are considered to be a backward step in terms of efficiency and effectiveness to the Peruvian maritime community and run contrary to current trend in the international maritime industry. Accordingly APAM, supported by FONASBA recommended that the Peruvian Government revoke this decision and allow the local port industry, transport and maritime agencies to operate in a free, open and competitive way for the benefit of the Peruvian economy and its consumers and exporters.

## Member Association Report — PORTUGAL

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

Membership: 102

Contact: *Mr. A. Belmar da Costa*

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Population:	10,737,765
GDP 2008/9:	US\$ 222.4 Billion
Total Volume of Exports (2008/9):	US\$ 43.71 Billion (FOB)
Total Volume of Imports (2008/9):	US\$ 67.64 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 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 also functions as an advisor, and even more importantly as a partner, in some of the specific national projects in the maritime transport sector.

Recognizing the continuous need for promoting the importance of the role of the shipping industries among the politicians, media and public AGEPOR, together with other associations, has been involved in lobbying continuously throughout 2009 in favour of development of the maritime economy in Portugal.

For many years education and training have been priority projects within the Portuguese agency industries and AGEPOR has been delivering both internal and external courses which are proving very successful within our membership. It is important and remarkable that AGEPOR organized, as in 2009, a course in the European School of Shortsea Shipping with about 50 participants sailing from Barcelona to Civitavecchia, enabling all students to understand better the need of shifting cargo from road to sea.

In 2009, holding the Vice-Presidency and the Executive Direction of the Portuguese Shortsea Promotion Centre, AGEPOR has participated actively in promoting the need to increase the use of short sea shipping in Portugal. Together with other 20 European countries AGEPOR has been involved in the ESN – the European Shortsea Network — in promoting the use of SSS throughout Europe.

AGEPOR has chaired ECASBA since 2008 and participates enthusiastically and actively in all activities related to FONASBA and 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:	2,054,645
GDP 2008/9	US\$ 55.46 Billion
Total Volume of Exports (2008/9):	US\$ 22.58 Billion
Total Volume of Imports (2008/9):	US\$ 23.44 Billion
Principal Commodities Imported:	Fuel, cereals and food products, motor vehicles, textiles
Principal Commodities Exported:	Wood products, industrial goods and domestic appliances

The Slovenian ship agency sector continues to suffer from both a lack of official recognition by the authorities and the ease with which any one, qualified or not, can establish themselves as a ship agent. Furthermore, there is no obligation on agents to be members of the association. The association continues to lobby the government for action on these issues but little progress is being made.

In spite of this, the association continues to support its members and has run a number of education courses on the role of the port agent and has introduced an examination for ship agents and forwarders on the International Maritime Dangerous Goods Code.

In anticipation of the introduction of the “single window” in Slovenia, the association is working in coordination with the other parties involved, through which agreement has been reached that the Chamber of Commerce will function as the national single window when the regime is introduced.

We are very concerned that the lack of European-wide coordination in projects such as the single window and the introduction of pan-European customs systems will result in significant problems when they are introduced. The impending introduction of ICS/ECS on 1st January 2011 is a case in point.

The association has also held discussions with members on the Rotterdam Rules and has come out against them.

Our concerns that a proposed takeover of the port of Koper could create a monopoly situation, and therefore bring with it the possibility that independent agents could be forced out, have been raised with the Ministry of Transport and the Slovenian competition authorities. Unfortunately, however, the scheme appears to have significant support within the government. We will, however, continue to press our case in case the project moves forward.

## Member Association Report — SOUTH AFRICA

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

Membership: 67

Contact: *Mr. A. Botha*

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*Tel: (2731) 266 1384 Fax: (2731) 266 1447*

*e-mail: secretary@asabosa-asl.org*

*website:*



Population:	49,052,489
GDP 2008/9:	US\$ 505.3 Billion
Total Volume of Exports 2008/9:	US\$ 66.64 Billion
Total Volume of Imports 2008/9:	US\$ 66.02 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. In keeping with its objectives, SAASOA participates in a variety of fora 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, continues to undertake their infrastructure investment programme aimed at building capacities in the South African port and rail network. Despite the recent economic downturn, Transnet is still investing heavily, particularly in the rail system, with the hopes of attracting a greater market share of cargo back onto rail with the assistance of SAASOA. Cargo handled in 2009 was 182,735,369 mt including 4.3 million containers. The bulk of Transnet employees recently embarked on protracted industrial action, having devastating effects particularly within the container sector. However, Transnet has recovered from these effects in the shortest space of time and remains geared for the next peak season.

Durban continues to see investment in container handling facilities, enjoying a much wider entrance channel and an extensive dredging programme at the container terminal berths, allowing access to bigger vessels. Salisbury Island also remains a site of interest for possible future container handling facilities. The other container handling ports continue to operate well, driven by Transnet's Quantum Leap programme, aimed at bringing about significant productivity improvements in South African ports. Ngqura has become an established container handling port over the past year, enjoying high levels of productivity and handling up to 8% of total container volumes. The automotive industry continues to see upswings in volumes following the recent recession and operates well throughout the various ports. Extensive investments will continue to occur at Richards Bay, one of the biggest bulk/breakbulk ports in South Africa, including extensive pro-active maintenance plans and infrastructural investments. SAASOA has begun working with TNPA in terms of developing a set of performance standards for all port concessionaires, hoping to drive higher port productivity levels countrywide.

The eight official South African ports are: Richards Bay, Durban, East London, Ngqura, Mossel Bay, Port Elizabeth, Cape Town and Saldanha Bay and an excellent resource for South African port-related information is: [www.transnetnationalportsauthority.net/](http://www.transnetnationalportsauthority.net/)

#### **Current and future Association activities**

SAASOA regularly consults with stakeholders including the Department of Transport; the eThekweni Maritime Cluster, the Transport Education Training Authority (TETA) and the Durban Chamber of Commerce and Industry. The Association is also part of the National Port User Forum and continues to further a number of issues with the Ports Regulator, now established for over a year, which will lead to the reduction in the cost of doing business in South Africa and specifically within the maritime sector.

SAASOA aims to further strengthen its relationship 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.

SAASOA also recently launched its exclusive Adopt-A-Learner programme, in conjunction with TETA and in line with our contribution to addressing skills shortages in this sector, which sees new entrants into the maritime field taken onboard by our members for invaluable work experience and preparing them for their future career in the maritime sector. SAASOA is intent on ensuring this programme remains sustainable, with a focus on growing the amount of learners its members can accommodate each year.

Renewed vigour is being shown in addressing the inefficiencies within the bulk and breakbulk handling facilities, particularly within Durban and Richards Bay, with the establishment of a two-tiered Bulk and Breakbulk Operators Forum, aimed at identifying and driving investment, maintenance and skilled personnel needs.

New Customs legislation is imminent, with SAASOA having had extensive input into this process.

## Member Association Report — SPAIN

Association: *Asociación 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 2008/9:	US\$ 1.362 Trillion
Total Volume of Exports (2008/9):	US\$ 226.8 Billion
Total Volume of Imports (2008/9):	US\$ 290.4 Billion
Principal Commodities Imported:	Machinery and equipment, fuels, chemicals, semi-finished goods, foodstuffs, consumer goods, measuring and medical control instruments
Principal Commodities Exported:	Machinery, motor vehicles; foodstuffs, pharmaceuticals, medicines, other consumer goods

Particularly important for the Ship Agencies members of ANESCO has been the approval by Parliament of Law 33/2010, of August 5, modifying Law 48/2003 relating to the Economic and Services Provision Regime for Ports of General Interest (Law of Ports).

ANESCO has also been following the progress through parliamentary of the Proposed General Law on Shipping, which includes provisions aimed at regulating the liability of Ship Agents.

Actions to expand the provision of education and knowledge to ship agency staff has included the provision of a number of courses on line including:

- Advanced Technician on Risks Prevention. Safety.
- VAT in Maritime Foreign Trade
- Technician on Human Resources
- Managing Skills

Development of short sea shipping continues to be the subject of intense activity within the sector, with ANESCO cooperating with the Spanish Short Sea Shipping Promotion Centre. On 14th April the Association attended the Event on Maritime Logistics in the Euroregion Aquitaine-Euskadi, in Bilbao, organized by the Platform Aquitaine-Euskadi, and on 22nd April, participated in the II Spanish Forum France-Spain, in Madrid, which debated the Motorways of the Sea between France and Spain.

Furthermore, at the invitation of DG MARE and the European Coordinator of Motorways of the Sea, ANESCO participated with the Short Sea Promotion Centre in the Workshop on Motorways of the Sea, one of the events of European Maritime Day 2010, held on 20th May in Gijón, The following day ANESCO also participated in the programme of the European Maritime Day at the invitation of DG MOVE.

On 5-8 June ANESCO attended the AUTORITAS course established for pupils of the Master on Shipping and Maritime Law of the Spanish Maritime Institute (IME) by the European School of Short Sea Shipping,

## Member Association Report — SWEDEN

Association: *The Swedish Shipbrokers' Association*

Membership: 141

Contact: *Mrs. B. Blomqvist*

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Population:	9,074,055
GDP 2008/9:	US\$ 402.4 Billion
Total Volume of Exports (2008/9):	US\$ 130.8 Billion
Total Volume of Imports (2008/9):	US\$ 120.5 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

This last year seems to be one of the most successful ones in a long time. We achieved respect from the Swedish Maritime Administration, and fulfilled a lot of our obligations to our members, e.g. a liability insurance cover for our members by ITIC.

#### Membership and FQS

The Swedish Shipbrokers' Association has 141 members, a very satisfying result considering the financial crisis, as that implies we gained two members last year. Almost fifty percent of them, or more than 60 companies, have 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. We also expect more commitment in this matter from all the other members, world wide.

#### Annual meetings

We had our 91<sup>st</sup> anniversary in a sunny Sundsvall, up in the north of Sweden. 82 members attended and besides the AGM and dinner, we also had an interesting visit at one of the biggest paper mills in Sweden. In Sweden the forest products is one of the biggest shipping commodities. In our autumn meeting, where 140 members attended, we discussed new customs' regulations, the need of liability insurance and how to increase the awareness of shipping amongst members of Parliament.

#### Economy of the association

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

#### Education

27 students registered for TutorShip, 31 enrolled for the exam and only 13 succeeded in at least one subject. We have also focused on one day courses. We have had one in Bill of lading, developed by ourselves and one in Tanker practice.

#### PR and lobbying

Last summer we attended the politician week in Gotland, an island outside the mainland where everyone involved in politics, media and lobbyism meet in July. We arranged the "shipping pub" together with the Swedish Maritime Administration, The Swedish Maritime Forum, The Federation of Swedish Ports and the Shipowners' Association. From 17.00 to 19.00 we served a buffet and some drinks while a speech was given, all which was highly appreciated amongst politicians, the shipping cluster and ordinary people interested in shipping.

#### 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.

#### Political decisions affecting the industry

We are still worried about the new IMO regulation to be implemented 2015, on reducing sulphur emission in SECA areas e.g. the North Sea and the 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. Together with the Swedish ship owners and the Nordic industries we wrote to EU to complain about the injustice this will create within EU when the northern countries have to pay an extra tax which does not apply at all in the southern part of EU.

## Member Association Report — UNITED STATES OF AMERICA

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

Membership: 189

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Population:	310,232,863
GDP 2008/9:	US\$ 14.26 Trillion
Total Volume of Exports (2008/9):	US\$ 1,046 Trillion
Total Volume of Imports (2008/9):	US\$ 1,563 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 hosted its Annual General Meeting on February 4<sup>th</sup> in New York City. Thomas Roberts, Partner of Compass Maritime Services a Sale & Purchase brokerage firm, was elected President. Tom brings a wealth of experience and energy to the Association. He announced the focus of his presidency at the Annual Meeting, "Use ASBA as your vehicle", meaning that members should use the ASBA Cargo Conference and social events as their vehicle to meet and entertain their clients. He also encouraged members to support ASBA education by having their new employees take our distance learning or home study courses and encourage participation in the many live seminars offered each year. In August of 2010, ASBA announced it will work with YSBA (Young Ship Brokers and Agents) to support their efforts in bringing the young members (under the age of 40) in the U.S. shipping industry together via social events and educational seminars.

Once again ASBA Agent Members have completed their annual review for Agent Certification. Full details of our certification guidelines, list of our certified members and 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. The Quality Standard has now received the endorsement of all of the major ship owner associations: INTERTANKO, INTERCARGO and BIMCO.

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). We have partnered with NAMO to raise U.S. government awareness of the uniqueness of the bulk trades, which typically are not represented at maritime roundtables. 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 was proud to host the VII Annual Meeting of CIANAM in April of 2010 in National Harbor, Maryland.

Our educational offerings have been well subscribed in 2009/2010. 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 include; The Business of Shipping Intensive I and II, and Marine Insurance. ASBA introduced a one-day Agency Seminar in May and will host this seminar in ports around the U.S.

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 150 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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