

FONASBA

**2015 MEMBERSHIP
SURVEY RESULTS**

Participating Members

- ◇ ANGOLA
- ◇ ARGENTINA
- ◇ AUSTRALIA
- ◇ BELGIUM
- ◇ BRAZIL
- ◇ BULGARIA
- ◇ CHINA
- ◇ CROATIA
- ◇ CYPRUS
- ◇ DENMARK
- ◇ DUBAI
- ◇ FINLAND
- ◇ FRANCE
- ◇ GERMANY
- ◇ GREAT BRITAIN
- ◇ HUNGARY
- ◇ INDIA
- ◇ ISRAEL
- ◇ ITALY
- ◇ JAPAN
- ◇ JORDAN
- ◇ KENYA
- ◇ LEBANON
- ◇ MALTA
- ◇ MOROCCO
- ◇ MEXICO
- ◇ NETHERLANDS
- ◇ PANAMA
- ◇ PERU
- ◇ POLAND
- ◇ PORTUGAL
- ◇ RUSSIA
- ◇ SLOVENIA
- ◇ SOUTH AFRICA
- ◇ SPAIN
- ◇ SWEDEN
- ◇ TURKEY Maritime Assn. - Agents.
- ◇ TURKEY - Shipbrokers
- ◇ USA

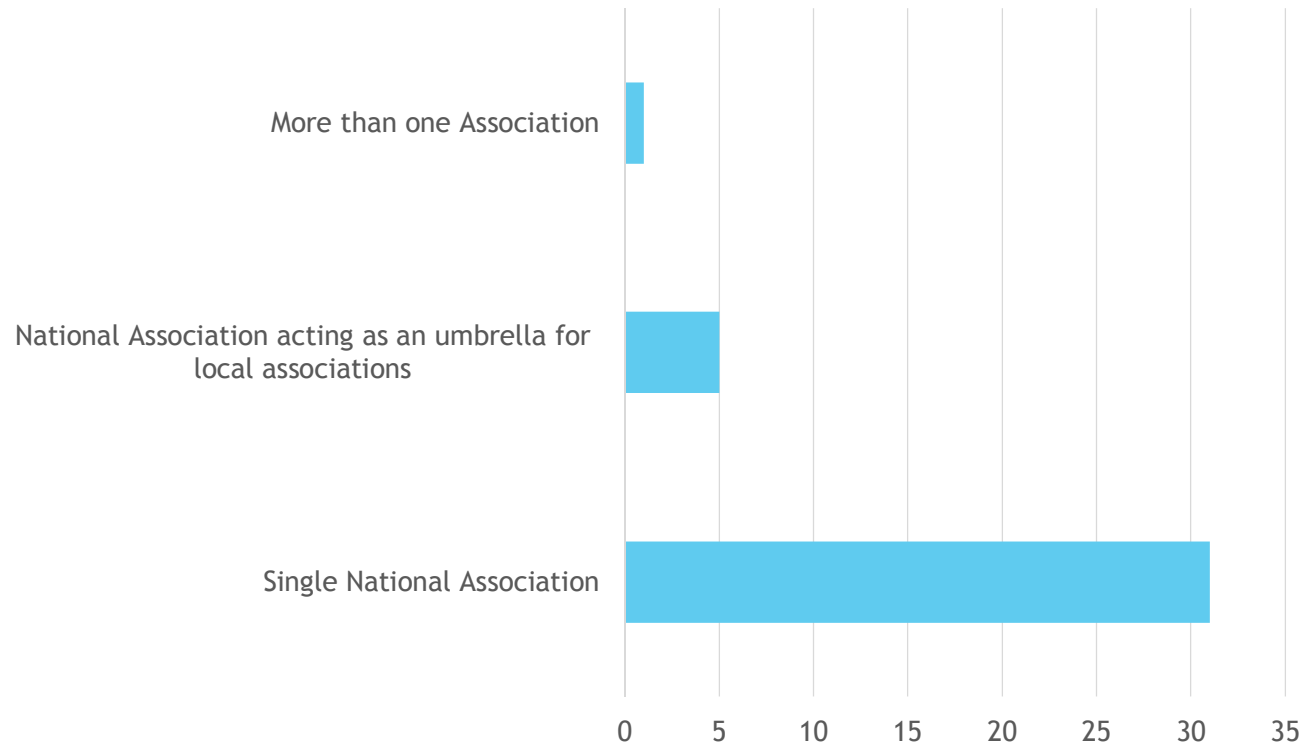
Total 38 countries/39 members

Structure of Maritime Association

- ▶ The majority of countries (32) are structured as a single national association
- ▶ Belgium, Brazil, France, Netherlands and Italy are national associations acting as an umbrella for local or regional associations
- ▶ Turkey is split into one umbrella organisation and two sector-specific organisations

Structure of Maritime Association

What is the structure of the Maritime Association in your country?

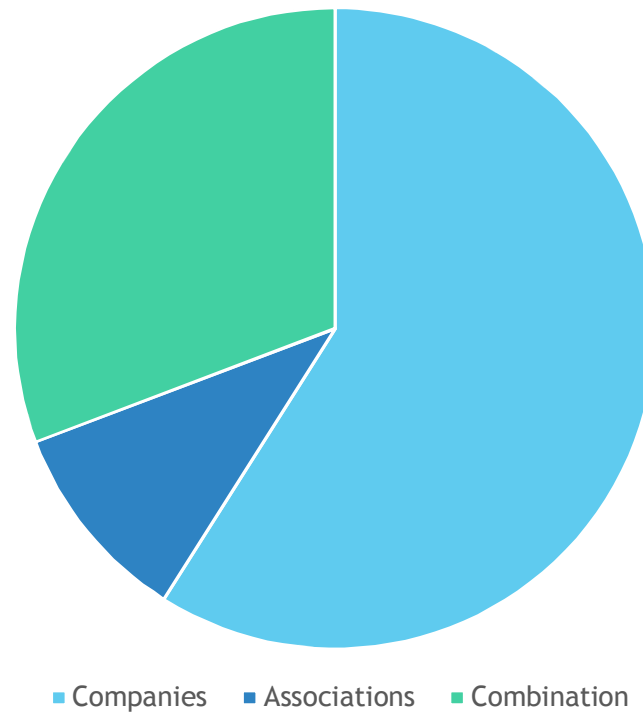


Member Types

- ▶ The majority (23) only have ship broking and/or ship agency companies as members
- ▶ Belgium, Brazil, France and Italy only have local or regional associations as members
- ▶ Angola has both ship agents and forwarding companies in membership
- ▶ Australia and Panama have both ship agents and shipping companies as members
- ▶ Germany has both local or regional associations and individual companies as members
- ▶ Australia, Bulgaria, Hungary, Poland, South Africa , Netherlands, Turkey and the USA allow individuals as members, often as Associate or Honorary Members

Member Types

Are your members companies, other associations or a combination?



Categories of Membership

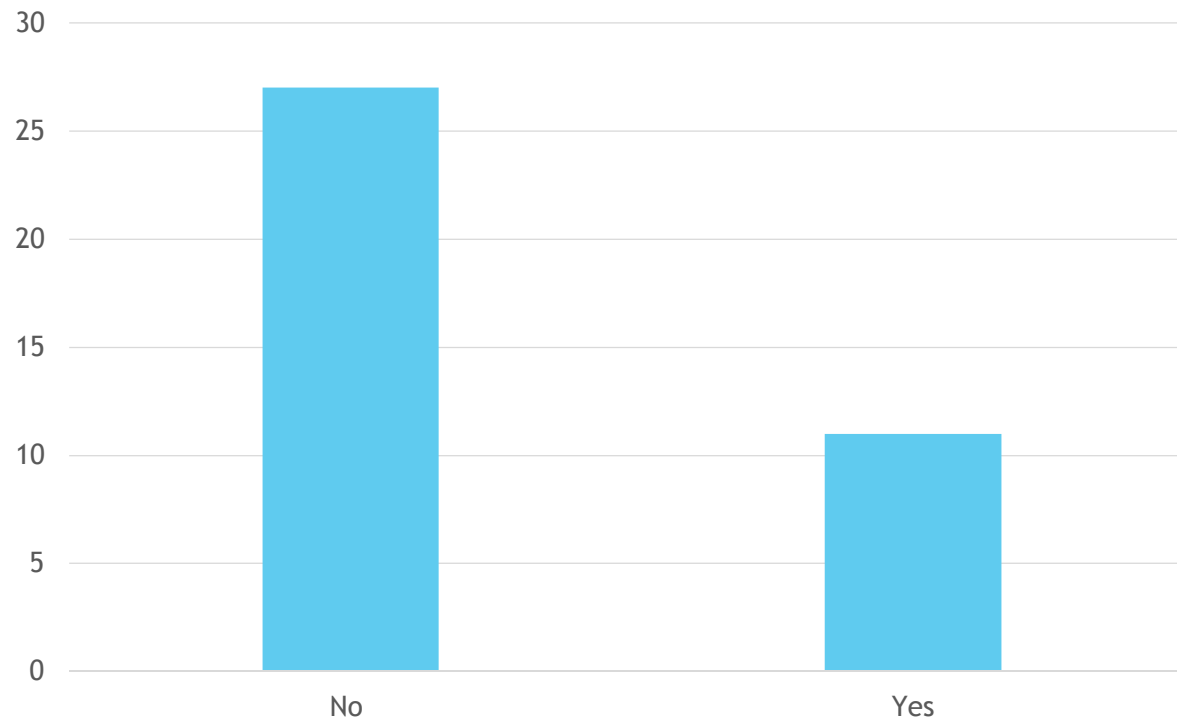
- ▶ 16 countries have more than one category of membership.
- ▶ Other than Full Members, other categories include Associate, Honorary, Observer and Branch Members.
- ▶ Some associations have a probation period before a company can gain Full Membership
- ▶ Voting rights vary between associations but in most cases are restricted to Full Members
- ▶ For the 4 umbrella organisations, membership is restricted to local associations only

Annual Dues Structure

- ▶ The majority of associations (22) charge a fixed annual fee per membership category
- ▶ One association charges liner agents an additional fee based on the NRT of the vessels they handle
- ▶ Three associations base the fee on the activity the member undertakes
- ▶ Two associations charge an additional fee for “special services”!
- ▶ Eleven associations can charge a fee on the number of port calls handled by the agent, but four do not do so

Charging Association Dues to Vessels

Do member agents have the right or practice of charging owner for Ship Agent Association dues via the final DA?



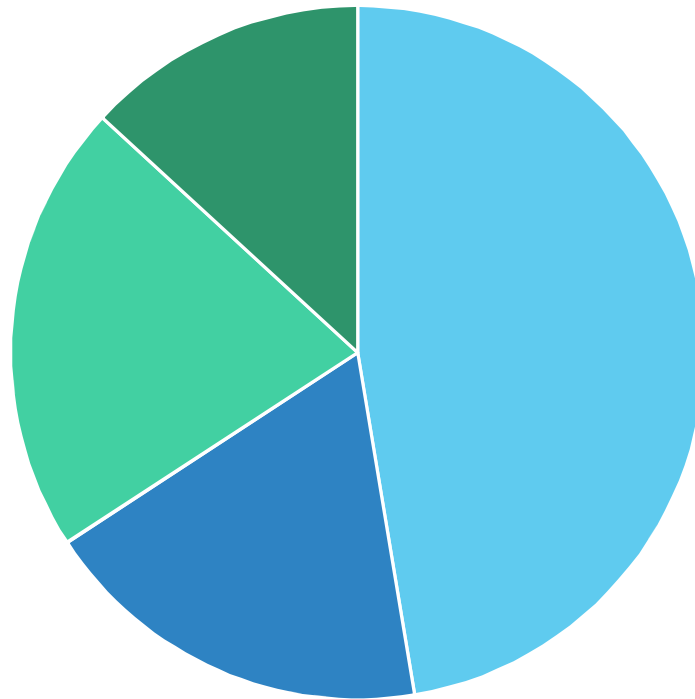
Number of Members (Companies):

- ▶ Under 50 Members: 18 Members
- ▶ 50-100 Members: 7 Members
- ▶ 100-200 Members: 9 Members
- ▶ 200 and More Members: 5 Members

The federated members have declared their membership numbers as follows: Brazil 150, Belgium 110, France 142, Italy 570, Netherlands 115.

Number of Members

Total Number of Members (Companies):



■ under 50 members ■ 51-100 members ■ 101-200 members ■ 200 and more members

Number of Association employees

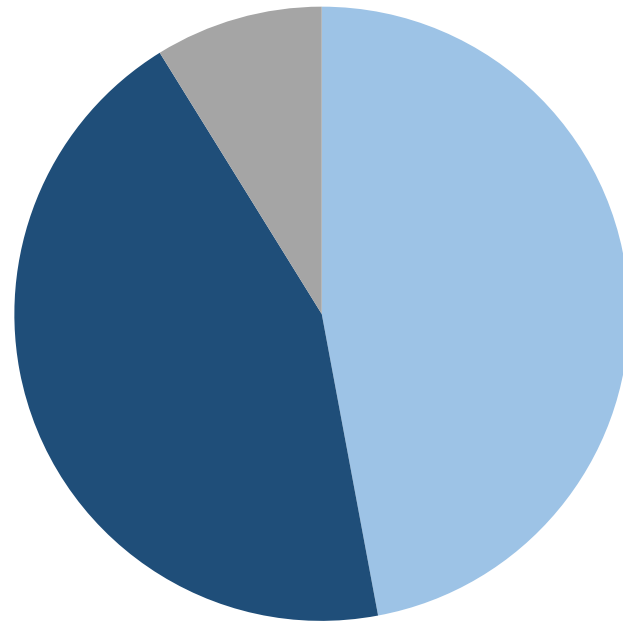
- ▶ 30 Members each have between 1 to 8 full time employees, the commonest number being 1 (in 8 members), two employ 8 staff
- ▶ The largest Member has 24 full time employees
- ▶ 8 Members have only part time employees

Income sources

- ▶ 20 Members advised that 100% of their income comes from annual membership fees
- ▶ Of the remaining 19 members, the fee income is supplemented by other activities including:
 - ▶ Provision of other services to members
 - ▶ sale of publications and statistics
 - ▶ IT service provision
 - ▶ Conferences and seminars
 - ▶ Investments and real estate
 - ▶ Education
 - ▶ Charterparty and other document sales

Financial reserves

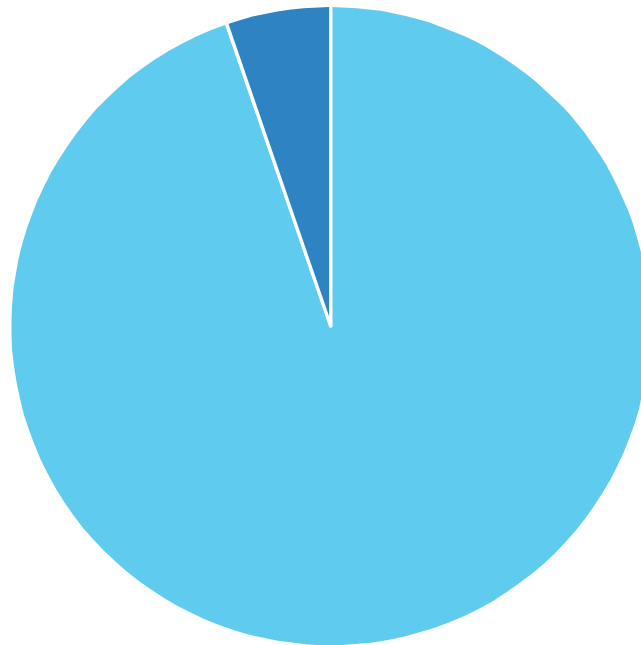
Does your Association have financial reserves that are not required for annual operation?



■ YES ■ NO ■ NOT APPLICABLE

Not-for-profit company/corporation?

Is your Association registered as a not-for-profit company/corporation?



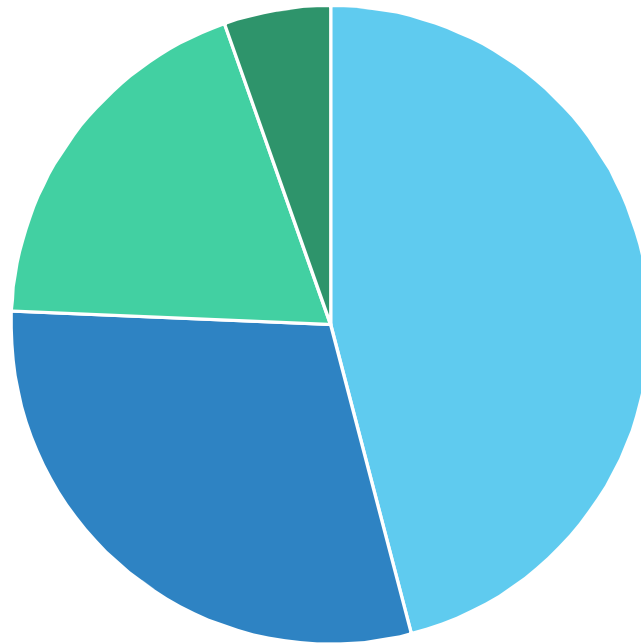
■ YES ■ NO

Association Governance

- ▶ All members have either a board or an Executive Committee
- ▶ The most common meeting frequency is stated as being “regularly”
- ▶ Other stated frequencies include:
 - Every two weeks - 1 Member
 - Every three weeks - 1 Member
 - Monthly - 9 Members
 - Six to eight times per year - 2 Members
 - Quarterly - 4 Members
 - Half yearly - 3 Members
 - “On Demand” - 1 Member

Association Governance

Does your Board meet regularly?



■ Regularly ■ Monthly or more ■ Quarterly or half yearly ■ Other

Individual Association Summary

- ▶ Association: AANTA, Angola
- ▶ Number of Members: 30 companies
- ▶ Number of Full/Part Time Staff: 0/4
- ▶ Income Sources: 50% fees, balance on request based on activities
- ▶ Membership Criteria: Must be a shipping agent or forwarder with a valid licence issued by IMPA (Maritime and Ports Institute of Angola)

Individual Association Summary

- ▶ Association: Centro de Navegación, Argentina
- ▶ Number of Members: 67 companies
- ▶ Number of Full Time Staff: 8/1
- ▶ Income Sources: 80% fees, 20% publications and statistics. Vessel call fee charged.
- ▶ Membership Criteria: Must be a ship agent operating in Argentina and sponsored by two existing members

Individual Association Summary

- ▶ Association: Shipping Australia, Australia
- ▶ Number of Members: 29 full, 51 corporate or associate
- ▶ Number of Full/Part Time Staff: 2/6
- ▶ Income Sources: 68% Membership fees, balance other sources
- ▶ Membership Criteria: Must be a liner or bulk shipping company operating in Australia

Individual Association Summary

- ▶ Association: NAVES, Belgium
- ▶ Number of Members: Umbrella organisation for 5 regional associations
- ▶ Number of Full/Part Time Staff: 1/3
- ▶ Income Sources: 100% membership fees from member associations. Some fixed costs paid by Antwerp Shipping Federation.
- ▶ Membership Criteria: Regional associations are members of NAVES

Individual Association Summary

- ▶ Association: FENAMAR, Brazil
- ▶ Number of Members: Umbrella organisation for 12 regional syndicates
- ▶ Number of Full/Part Time Staff: 4/0
- ▶ Income Sources: 30% of vessel fees charged by agent members of regional syndicates, 15% of compulsory shipping company registration fee
- ▶ Membership Criteria: Regional syndicates are members of FENAMAR

Individual Association Summary

- ▶ Association: BASBA, Bulgaria
- ▶ Number of Members: Not stated
- ▶ Number of Full/Part Time Staff: 1/1
- ▶ Income Sources: 95 % membership fees, 5% from financial reserves
- ▶ Membership Criteria: Full members: Ship broking or ship agency companies operating in Bulgaria for at least two years. Must be sponsored by at least two existing members
- ▶ Associate members: companies operating in maritime trade other than ship broking or ship agency

Individual Association Summary

- ▶ Association: CASA, China
- ▶ Number of Members: 447
- ▶ Number of Full/Part Time Staff: 8/0
- ▶ Income Sources: 100% membership fees
- ▶ Membership Criteria: Must be a ship agency company or non-vessel owning common carrier

Individual Association Summary

- ▶ Association: ASBAC, Croatia
- ▶ Number of Members: 27
- ▶ Number of Full/Part Time Staff: 0/4
- ▶ Income Sources: 100% membership fees
- ▶ Membership Criteria: Formal registration as a company at the commercial court and as a ship agent by the relevant Harbour Master

Individual Association Summary

- ▶ Association: Cyprus Shipping Association, Cyprus
- ▶ Number of Members: 45
- ▶ Number of Full/Part Time Staff: 7/0
- ▶ Income Sources: 70% membership fees, 30% other unspecified sources.
- ▶ Membership Criteria: Main activity must be as a ship agent, owner/director must be adequately experienced, appropriate insurance in place, paid up capital not less than €50,000

Individual Association Summary

- ▶ Association: Danish Shipbrokers Association, Denmark
- ▶ Number of Members: 85
- ▶ Number of Full/Part Time Staff: 1/1
- ▶ Income Sources: 83% membership fees, balance from service charges, provision of education services, seminars etc.
- ▶ Membership Criteria: Applications must be approved by the association board

Individual Association Summary

- ▶ Association: Dubai Shipping Agents Association, Dubai
- ▶ Number of Members: 84
- ▶ Number of Full/Part Time Staff: 1
- ▶ Income Sources: 100% Membership fees
- ▶ Membership Criteria: Companies must be shipping agents operating in Dubai. Companies operating in other UAE or Gulf Cooperation Council member states may be considered for membership subject to Executive Committee approval

Individual Association Summary

- ▶ Association: Finnish Shipbrokers' Assn., Finland
- ▶ Number of Members: 54
- ▶ Number of Full/Part Time Staff: 0/1
- ▶ Income Sources: 100% membership fees
- ▶ Membership Criteria: Must be a company providing ship agent or ship broking services in Finland

Individual Association Summary

- ▶ Association: AMCF/FACAM, France
- ▶ Number of Members: Umbrella organisation for 12 regional associations
- ▶ Number of Full/Part Time Staff: 0/2
- ▶ Income Sources: 100% membership from regional association members
- ▶ Membership Criteria: Regional associations must be a member of AMCF/FACAM

Individual Association Summary

- ▶ Association: ZVDS, Germany
- ▶ Number of Members: Primarily umbrella organisation for 9 regional associations comprising 315 companies
- ▶ Number of Full/Part Time Staff: 2/1
- ▶ Income Sources: 100% membership fees
- ▶ Membership Criteria: Must be a ship broker or ship agent working in Germany

Individual Association Summary

- ▶ Association: Institute of Chartered Shipbrokers, Great Britain
- ▶ Number of Members: 110 company members + branch offices
- ▶ Number of Full/Part Time Staff: 1/2
- ▶ Income Sources: 100% Membership fees
- ▶ Membership Criteria: Company members must be able to demonstrate to the satisfaction of Federation Council of the Institute that they are actively involved shipbroking, liner or port agency or management. They must have a FICS or MICS in senior position and appropriate P&I cover must be in place.

Individual Association Summary

- ▶ Association: HUNASBA, Hungary
- ▶ Number of Members: 11, 5 companies, 6 individuals
- ▶ Number of Full/Part Time Staff: 0/1
- ▶ Income Sources: 50% membership fees, 50% member contributions
- ▶ Membership Criteria: Must be a ship owner/broker/cargo agent working in Hungary and worldwide

Individual Association Summary

- ▶ Association: CHENSAA, India
- ▶ Number of Members: 147
- ▶ Number of Full/Part Time Staff: 1/1
- ▶ Income Sources: 50% membership fees, balance not stated
- ▶ Membership Criteria: Details of company registration, support letter from overseas principals confirming activities, Chennai customs authority license details

Individual Association Summary

- ▶ Association: Israel Chamber of Shipping, Israel
- ▶ Number of Members: 51
- ▶ Number of Full/Part Time Staff: 4/0
- ▶ Income Sources: 94% membership fees, balance educational activities, real estate investments etc.
- ▶ Membership Criteria: Must be a company certified by the Israeli government to act as a ship agent

Individual Association Summary

- ▶ Association: FEDERAGENTI, Italy
- ▶ Number of Members: Umbrella organisation for 20 local associations representing 570 companies
- ▶ Number of Full/Part Time Staff: 4/0
- ▶ Income Sources: 100% membership fees charged via local associations. Vessel call fee applied.
- ▶ Membership Criteria: Company member of local association

Individual Association Summary

- ▶ Association: JAFSA, Japan
- ▶ Number of Members: 67 companies
- ▶ Number of Full/Part Time Staff: 1/0
- ▶ Income Sources: 100% membership fees
- ▶ Membership Criteria: Company must be registered by the relevant local government regulator

Individual Association Summary

- ▶ Association: Jordan Shipping Assn. Jordan
- ▶ Number of Members: 66
- ▶ Number of Full/Part Time Staff: 6/2
- ▶ Income Sources: 80% membership fees, rent of association office, seminars, training, publication of annual shipping study
- ▶ Membership Criteria: Companies must be registered with the Jordan Maritime Authority, ship agents must provide a copy of a certificate from their principal confirming activities in Aqaba port

Individual Association Summary

- ▶ Association: Kenya Ships Agents Assn. Kenya
- ▶ Number of Members: 43
- ▶ Number of Full/Part Time Staff: 2/1
- ▶ Income Sources: 100% membership fees
- ▶ Membership Criteria: Membership is open to ship agents and operators resident in east African countries. The company must be a limited liability partnership or be wholly owned and duly registered

Individual Association Summary

- ▶ Association: Lebanese Shipping Agents Syndicate, Lebanon
- ▶ Number of Members: 27
- ▶ Number of Full/Part Time Staff: 1/0
- ▶ Income Sources: 75% membership fees, 25% ship call charge
- ▶ Membership Criteria: Must be a licensed ship agent

Individual Association Summary

- ▶ Association: Association of Ship Agents, Malta
- ▶ Number of Members: 29
- ▶ Number of Full/Part Time Staff: 0/1
- ▶ Income Sources: 100% membership fees
- ▶ Membership Criteria: The company must be a ship broker or ship agent operating in Malta and Maltese territorial waters

Individual Association Summary

- ▶ Association: AMANAC, Mexico
- ▶ Number of Members: 59 companies, 3 individuals
- ▶ Number of Full/Part Time Staff: 24
- ▶ Income Sources: 10% membership fees, 90% unspecified services
- ▶ Membership Criteria: Not stated

Individual Association Summary

- ▶ Association: VRC, Netherlands
- ▶ Number of Members: 115 companies
Number of Full/Part Time Staff: 3
- ▶ Income Sources: 80% membership fees, 20% unspecified services
- ▶ Membership Criteria: Members must complete annual certification, at least a year long activity as ship agent or broker, handling minimum of 25 calls and at least 5 employees.

Individual Association Summary

- ▶ Association: APRAM, Morocco
- ▶ Number of Members: 41
- ▶ Number of Full/Part Time Staff: 2/40
- ▶ Income Sources: 80% membership fees, balance unspecified
- ▶ Membership Criteria: Applicant company must be acting as a ship agent or ship broker in Morocco

Individual Association Summary

- ▶ Association: CMP, Panama
- ▶ Number of Members: 39
- ▶ Number of Full/Part Time Staff: 5/0
- ▶ Income Sources: 80% membership fees, balance unspecified
- ▶ Membership Criteria: Applicant company must be active in the maritime or logistics sector in Panama

Individual Association Summary

- ▶ Association: APAM, Peru
- ▶ Number of Members: 27
- ▶ Number of Full/Part Time Staff: 3/2
- ▶ Income Sources: 99% membership fees, balance unspecified
- ▶ Membership Criteria: The company must have a valid license to operate as a ship agent

Individual Association Summary

- ▶ Association: Polish Shipbrokers' Assn., Poland
- ▶ Number of Members: 19
- ▶ Number of Full/Part Time Staff: 0/2
- ▶ Income Sources: 100% membership fees
- ▶ Membership Criteria: Members must be a ship agent or ship broker based in Poland

Individual Association Summary

- ▶ Association: AGEPOR, Portugal
- ▶ Number of Members: 82
- ▶ Number of Full/Part Time Staff: 6/0
- ▶ Income Sources: 100% membership fees. Vessel call fee charged
- ▶ Membership Criteria: Member companies must be licensed by the relevant Government authority

Individual Association Summary

- ▶ Association: Assn. of St. Petersburg Shipping Agencies, Russia
- ▶ Number of Members: 23
- ▶ Number of Full/Part Time Staff: 1/1
- ▶ Income Sources: 100% membership fees
- ▶ Membership Criteria: Applicant members must be recommended by two existing members

Individual Association Summary

- ▶ Association: Slovenian Ship & Freight Agents' Assn., Slovenia
- ▶ Number of Members: 24
- ▶ Number of Full/Part Time Staff: 250/10
- ▶ Income Sources: 100% membership fees
- ▶ Membership Criteria: Companies must be registered by the Court of Maritime Agency and a member of the Chamber of Commerce of Slovenia

Individual Association Summary

- ▶ Association: SAASOA, South Africa
- ▶ Number of Members: 119
- ▶ Number of Full/Part Time Staff: 4/0
- ▶ Income Sources: 100% Membership fee and per call levy
- ▶ Membership Criteria: A company must be established and operating as a ship agent or ship operator in South Africa for a minimum of 3 months and be registered with TNPA.

Individual Association Summary

- ▶ Association: ANESCO, Spain
- ▶ Number of Members: 148
- ▶ Number of Full/Part Time Staff: 2/2
- ▶ Income Sources: 100% membership fees
- ▶ Membership Criteria: Must be a ship agent or stevedoring company legally established and operating in Spain

Individual Association Summary

- ▶ Association: Swedish Shipbrokers' Assn. Sweden
- ▶ Number of Members: 139
- ▶ Number of Full/Part Time Staff: 0/2
- ▶ Income Sources: 60% membership fees, 40% education, meetings and other events
- ▶ Membership Criteria: Companies must be acting as a ship broker or ship agent in Sweden and be approved by the association board

Individual Association Summary

- ▶ Association: Maritime Assn. of Shipowners and Agents, Turkey
- ▶ Number of Members: 130
- ▶ Number of Full/Part Time Staff: 6/0
- ▶ Income Sources: 100% membership fees plus port call or Bosphorus transit fee
- ▶ Membership Criteria: The company must be acting as a licensed ship agent and must be sponsored by two existing members

Individual Association Summary

- ▶ Association: Turkish Shipbrokers' Assn. Turkey
- ▶ Number of Members: 354 individual members
- ▶ Number of Full/Part Time Staff: 1
- ▶ Income Sources: 65% membership fees, 35% biennial Shipbrokers' Dinner
- ▶ Membership Criteria: By application only. Individuals are accepted into membership without voting rights for the first two years. Following completion of this probationary period, Full membership, with voting rights, is granted.

Individual Association Summary

- ▶ Association: ASBA, USA
- ▶ Number of Members: 163 Full members, 17 individual members, 18 Honorary members
- ▶ Number of Full/Part Time Staff: 1/1
- ▶ Income Sources: 15% membership fees, tanker rate schedule 2.7%, social events 4.5%, annual conference 41.5%, charterparty sales 3.1%, other 3.1%
- ▶ Membership Criteria: Applicants must be operating as a ship broker or ship agent in the USA for at least one year and be sponsored by two existing members. All members must be certified annually.