



## FONASBA MEMBERSHIP SURVEY

10 April 2026

# FONASBA Survey: Assessing the Impact of Digitalisation and Environmental Regulation on Maritime Supply Chains

This survey is part of an MSc dissertation, assessing the impact of digitalisation and environmental regulation on maritime supply chains. We kindly request the support of members in completing the survey below, which focuses on evaluating these impacts on maritime supply chains.

The purpose of the survey is to gather industry perspectives on how digital tools, emissions requirements, and regulatory frameworks influence operational practices.

All responses are anonymous and shall be used for academic purposes only

**Kindly submit your response by Friday, 10th April 2026, COB.**

Please find below the consolidated results of the survey for your review.



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## Questions and Answers:

### Q1. Which best describes your current role?

COUNTRY	YOUR ASSOCIATION / ORGANISATION / COMPANY NAME	Which best describes your current role?
Argentina	Centro De Navegación	Maritime agency
Belgium	Belgian Shipping Federation NPO	Maritime agency
Brazil	FENAMAR	Maritime agency
Croatia	Dragon Maritime Adria D.O.O.	Maritime agency
Croatia		Maritime agency
Croatia	ASBAC	Shipbroking
Croatia	Dragon Maritime Adria Ltd	Shipbroking
Croatia		Shipping company/operator
Croatia	Acquera Yachting	Maritime agency
Denmark	Danish Shipbrokers and Port Operators	
France	SOGEBRAS	Port/terminal
France	AMCF	Maritime agency
France	AMB	Maritime agency
France	Agence Maritime Malouine	Maritime agency
Germany	ZVDS	
Germany	ZVDS	Shipping company/operator
Hungary	HUNASBA	Freight forwarding/logistics
Isreal	Israel Chamber of Shipping	Legal/Insurance
Japan	Japan Association of Foreign-Trade Ship Agencies	
Jordan	Jordan Shipping Association / Gargour Shipping Company	Maritime agency
Lebanon	Lebanese Shipping Agents Syndicate	Maritime agency
Mexico	AMANAC	
Monaco	Marine Chartering Services	Shipping company/operator
Morocco	APRAM	Maritime agency



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Mozambique	Manica Freight Services	Freight forwarding/logistics
Netherlands	VNC	Shipping company/operator
Poland	Polish Shipbrokers' Association	Maritime agency
Slovenia	The Slovenian Ship and Freight Agents Association	Maritime agency
South Africa	SAASOA	Legal / insurance
Tunisia	All Seas Shipping Agency	Maritime agency
Ukraine	Association Of Maritime Agencies of Ukraine	
United Arab Emirates	Webb Fontaine	
Uruguay	Centro De Navegación	Port/terminal
USA	ASBA	

## Q1b. If Others, Specify

COUNTRY	YOUR ASSOCIATION / ORGANISATION / COMPANY NAME	If Others, Specify
Argentina	Centro De Navegación	National Chamber of Shipping Agencies
Belgium	Belgian Shipping Federation NPO	professional organization
Brazil	FENAMAR	We represent maritime agencies at the national level.
Croatia	Dragon Maritime Adria D.O.O.	
Croatia		
Croatia	ASBAC	
Croatia	Dragon Maritime Adria Ltd	Chartering
Croatia		
Croatia	Acquera Yachting	
Denmark	Danish Shipbrokers and Port Operators	membership organisation
France	SOGEBRAS	Ship Agency/Warehousing Company/Terminal
France	AMCF	



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France	AMB	
France	Agence Maritime Malouine	
Germany	ZVDS	Association / Software Provider
Germany	ZVDS	Association
Hungary	HUNASBA	
Isreal	Israel Chamber of Shipping	The chamber represents 95%of the Israeli Shipping Agents
Japan	Japan Association of Foreign-Trade Ship Agencies	Ship Agency Business
Jordan	Jordan Shipping Association / Gargour Shipping Company	N/A
Lebanon	Lebanese Shipping Agents Syndicate	
Mexico	AMANAC	ONG
Monaco	Marine Chartering Services	
Morocco	APRAM	
Mozambique	Manica Freight Services	
Netherlands	VNC	Ship agents & ship brokers association
Poland	Polish Shipbrokers' Association	Terminal operator (TOO)
Slovenia	The Slovenian Ship and Freight Agents Association	
South Africa	SAASOA	Shipping Association
Tunisia	All Seas Shipping Agency	
Ukraine	Association Of Maritime Agencies of Ukraine	Association Of Maritime Agencies
United Arab Emirates	Webb Fontaine	Port Community System & Maritime Single Window Solutions Provider
Uruguay	Centro De Navegación	All of the Above
USA	ASBA	Trade Association Representing Brokers and Agents



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## Q2. How many years of experience do you have in the maritime or logistics sector?

COUNTRY	YOUR ASSOCIATION / ORGANISATION / COMPANY NAME	How many years of experience do you have in the maritime or logistics sector?
Argentina	Centro De Navegación	11 - 20
Belgium	Belgian Shipping Federation NPO	20+
Brazil	FENAMAR	20+
Croatia	Dragon Maritime Adria D.O.O.	11 - 20
Croatia		11 - 20
Croatia	ASBAC	1 - 5
Croatia	Dragon Maritime Adria Ltd	20+
Croatia		20+
Croatia	Acquera Yachting	1 - 5
Denmark	Danish Shipbrokers and Port Operators	20+
France	SOGEBRAS	6 - 10
France	AMCF	20+
France	AMB	6 - 10
France	Agence Maritime Malouine	20+
Germany	ZVDS	11 - 20
Germany	ZVDS	11 - 20
Hungary	HUNASBA	20+
Isreal	Israel Chamber of Shipping	20+
Japan	Japan Association of Foreign-Trade Ship Agencies	20+
Jordan	Jordan Shipping Association / Gargour Shipping Company	20+
Lebanon	Lebanese Shipping Agents Syndicate	20+
Mexico	AMANAC	20+



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Monaco	Marine Chartering Services	
Morocco	APRAM	20+
Mozambique	Manica Freight Services	20+
Netherlands	VNC	20+
Poland	Polish Shipbrokers' Association	20+
Slovenia	The Slovenian Ship and Freight Agents Association	11 - 20
South Africa	SAASOA	20+
Tunisia	All Seas Shipping Agency	20+
Ukraine	Association Of Maritime Agencies of Ukraine	11 - 20
United Arab Emirates	Webb Fontaine	6 - 10
Uruguay	Centro De Navegación	20+
USA	ASBA	1 - 5

### Q3. To what extent has digitalisation influenced your day-to-day activities?

COUNTRY	YOUR ASSOCIATION / ORGANISATION / COMPANY NAME	To what extent has digitalisation influenced your day-to-day activities?
Argentina	Centro De Navegación	To a moderate extent
Belgium	Belgian Shipping Federation NPO	To a significant extent
Brazil	FENAMAR	To a significant extent
Croatia	Dragon Maritime Adria D.O.O.	To a significant extent
Croatia		To a moderate extent
Croatia	ASBAC	To a moderate extent
Croatia	Dragon Maritime Adria Ltd	To a moderate extent
Croatia		To a limited extent
Croatia	Acquera Yachting	To a significant extent
Denmark	Danish Shipbrokers and Port Operators	To a significant extent
France	SOGEBRAS	To a moderate extent



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France	AMCF	To a moderate extent
France	AMB	To a significant extent
France	Agence Maritime Malouine	To a significant extent
Germany	ZVDS	To a moderate extent
Germany	ZVDS	To a significant extent
Hungary	HUNASBA	To a moderate extent
Israel	Israel Chamber of Shipping	To a significant extent
Japan	Japan Association of Foreign-Trade Ship Agencies	To a moderate extent
Jordan	Jordan Shipping Association / Gargour Shipping Company	To a significant extent
Lebanon	Lebanese Shipping Agents Syndicate	To a moderate extent
Mexico	AMANAC	To a significant extent
Monaco	Marine Chartering Services	To a significant extent
Morocco	APRAM	To a significant extent
Mozambique	Manica Freight Services	To a moderate extent
Netherlands	VNC	To a significant extent
Poland	Polish Shipbrokers' Association	To a moderate extent
Slovenia	The Slovenian Ship and Freight Agents Association	To a significant extent
South Africa	SAASOA	Not at all
Tunisia	All Seas Shipping Agency	To a significant extent
Ukraine	Association Of Maritime Agencies of Ukraine	To a moderate extent
United Arab Emirates	Webb Fontaine	To a significant extent
Uruguay	Centro De Navegación	To a significant extent
USA	ASBA	To a significant extent



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## Q4. In your opinion, what are the primary benefits of digitalisation in maritime supply chains?

COUNTRY	YOUR ASSOCIATION / ORGANISATION / COMPANY NAME	In your opinion, what are the primary benefits of digitalisation in maritime supply chains?
Argentina	Centro De Navegación	Improved operational efficiency
Belgium	Belgian Shipping Federation NPO	Improved operational efficiency
Brazil	FENAMAR	
Croatia	Dragon Maritime Adria D.O.O.	Improved operational efficiency
Croatia		Faster documentation processes
Croatia	ASBAC	Enhanced data visibility
Croatia	Dragon Maritime Adria Ltd	Enhanced data visibility
Croatia		Faster documentation processes
Croatia	Acquera Yachting	Faster documentation processes
Denmark	Danish Shipbrokers and Port Operators	Enhanced data visibility
France	SOGEBRAS	Enhanced data visibility
France	AMCF	Faster documentation processes
France	AMB	Improved operational efficiency
France	Agence Maritime Malouine	Improved operational efficiency
Germany	ZVDS	Improved operational efficiency
Germany	ZVDS	Enhanced data visibility
Hungary	HUNASBA	Faster documentation processes
Isreal	Israel Chamber of Shipping	All the points are relevant
Japan	Japan Association of Foreign-Trade Ship Agencies	Improved operational efficiency
Jordan	Jordan Shipping Association / Gargour Shipping Company	Faster documentation processes
Lebanon	Lebanese Shipping Agents Syndicate	Improved operational efficiency
Mexico	AMANAC	Improved operational efficiency
Monaco	Marine Chartering Services	Improved operational efficiency
Morocco	APRAM	Faster documentation processes
Mozambique	Manica Freight Services	Improved operational efficiency



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Netherlands	VNC	Improved operational efficiency
Poland	Polish Shipbrokers' Association	Improved operational efficiency
Slovenia	The Slovenian Ship and Freight Agents Association	Improved operational efficiency
South Africa	SAASOA	Improved operational efficiency
Tunisia	All Seas Shipping Agency	Faster documentation processes
Ukraine	Association Of Maritime Agencies of Ukraine	Faster documentation processes
United Arab Emirates	Webb Fontaine	Improved operational efficiency
Uruguay	Centro De Navegación	Faster documentation processes
USA	ASBA	Improved operational efficiency

## Q4b. If Others, Specify

COUNTRY	YOUR ASSOCIATION / ORGANISATION / COMPANY NAME	If Others, Specify
Argentina	Centro De Navegación	Enhances transparency and faster documentation processes
Belgium	Belgian Shipping Federation NPO	
Brazil	FENAMAR	All above. Digitalisation is a structural enabler for competitiveness and compliance across the sector.
Croatia	Dragon Maritime Adria D.O.O.	
Croatia		All of above, but mainly faster documentation process
Croatia	ASBAC	
Croatia	Dragon Maritime Adria Ltd	improved operational efficiency, faster documentation processes
Croatia		
Croatia	Acquera Yachting	
Denmark	Danish Shipbrokers and Port Operators	
France	SOGEBRAS	Improved data analysis and usage



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France	AMCF	
France	AMB	
France	Agence Maritime Malouine	
Germany	ZVDS	
Germany	ZVDS	
Hungary	HUNASBA	
Israel	Israel Chamber of Shipping	Not relevant
Japan	Japan Association of Foreign-Trade Ship Agencies	
Jordan	Jordan Shipping Association / Gargour Shipping Company	Cost Reduction, less manpower required in ship agencies, and improved operational efficiency
Lebanon	Lebanese Shipping Agents Syndicate	
Mexico	AMANAC	
Monaco	Marine Chartering Services	
Morocco	APRAM	Information becomes available
Mozambique	Manica Freight Services	
Netherlands	VNC	
Poland	Polish Shipbrokers' Association	
Slovenia	The Slovenian Ship and Freight Agents Association	
South Africa	SAASOA	
Tunisia	All Seas Shipping Agency	
Ukraine	Association Of Maritime Agencies of Ukraine	
United Arab Emirates	Webb Fontaine	Cost reduction and enhanced data visibility
Uruguay	Centro De Navegación	-
USA	ASBA	



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## Q5. To what extent do you rely on digital data (e.g., operational, commercial, or performance data) in your role?

COUNTRY	YOUR ASSOCIATION / ORGANISATION / COMPANY NAME	To what extent do you rely on digital data (e.g., operational, commercial, or performance data) in your role?
Argentina	Centro De Navegación	High reliance
Belgium	Belgian Shipping Federation NPO	Not at all
Brazil	FENAMAR	Moderate reliance
Croatia	Dragon Maritime Adria D.O.O.	High reliance
Croatia		High reliance
Croatia	ASBAC	High reliance
Croatia	Dragon Maritime Adria Ltd	Moderate reliance
Croatia		Limited reliance
Croatia	Acquera Yachting	High reliance
Denmark	Danish Shipbrokers and Port Operators	High reliance
France	SOGEBRAS	High reliance
France	AMCF	Limited reliance
France	AMB	High reliance
France	Agence Maritime Malouine	Moderate reliance
Germany	ZVDS	Limited reliance
Germany	ZVDS	Moderate reliance
Hungary	HUNASBA	Limited reliance
Isreal	Israel Chamber of Shipping	High Reliance
Japan	Japan Association of Foreign-Trade Ship Agencies	Moderate reliance
Jordan	Jordan Shipping Association / Gargour Shipping Company	High reliance
Lebanon	Lebanese Shipping Agents Syndicate	Moderate reliance
Mexico	AMANAC	High reliance



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Monaco	Marine Chartering Services	High reliance
Morocco	APRAM	Moderate reliance
Mozambique	Manica Freight Services	Moderate reliance
Netherlands	VNC	High reliance
Poland	Polish Shipbrokers' Association	Moderate reliance
Slovenia	The Slovenian Ship and Freight Agents Association	High reliance
South Africa	SAASOA	
Tunisia	All Seas Shipping Agency	High reliance
Ukraine	Association Of Maritime Agencies of Ukraine	Moderate reliance
United Arab Emirates	Webb Fontaine	High reliance
Uruguay	Centro De Navegación	Limited reliance
USA	ASBA	Moderate reliance

### Q6. To what extent have environmental or emissions-related requirements influenced your work?

COUNTRY	YOUR ASSOCIATION / ORGANISATION / COMPANY NAME	To what extent have environmental or emissions-related requirements influenced your work?
Argentina	Centro De Navegación	Slightly
Belgium	Belgian Shipping Federation NPO	Moderately
Brazil	FENAMAR	Moderately
Croatia	Dragon Maritime Adria D.O.O.	Slightly
Croatia		Moderately
Croatia	ASBAC	Not at all
Croatia	Dragon Maritime Adria Ltd	Slightly
Croatia		Slightly
Croatia	Acquera Yachting	Moderately
Denmark	Danish Shipbrokers and Port Operators	Not at all



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France	SOGEBRAS	Moderately
France	AMCF	Slightly
France	AMB	Slightly
France	Agence Maritime Malouine	Moderately
Germany	ZVDS	Slightly
Germany	ZVDS	Not at all
Hungary	HUNASBA	Not at all
Israel	Israel Chamber of Shipping	Moderately
Japan	Japan Association of Foreign-Trade Ship Agencies	Moderately
Jordan	Jordan Shipping Association / Gargour Shipping Company	Moderately
Lebanon	Lebanese Shipping Agents Syndicate	Not at all
Mexico	AMANAC	Moderately
Monaco	Marine Chartering Services	Significantly
Morocco	APRAM	Significantly
Mozambique	Manica Freight Services	Slightly
Netherlands	VNC	Slightly
Poland	Polish Shipbrokers' Association	Moderately
Slovenia	The Slovenian Ship and Freight Agents Association	Slightly
South Africa	SAASOA	Not at all
Tunisia	All seas shipping Agency	Slightly
Ukraine	Association Of Maritime Agencies of Ukraine	Not at all
United Arab Emirates	Webb Fontaine	Moderately
Uruguay	Centro De Navegación	Moderately
USA	ASBA	Moderately



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## Q7. In your experience, emissions-related measures primarily affect

COUNTRY	YOUR ASSOCIATION / ORGANISATION / COMPANY NAME	In your experience, emissions-related measures primarily affect
Argentina	Centro De Navegación	Costs
Belgium	Belgian Shipping Federation NPO	Costs
Brazil	FENAMAR	Not sure
Croatia	Dragon Maritime Adria D.O.O.	Compliance processes
Croatia		Costs
Croatia	ASBAC	Not sure
Croatia	Dragon Maritime Adria Ltd	Costs
Croatia		Operational planning
Croatia	Acquera Yachting	Not sure
Denmark	Danish Shipbrokers and Port Operators	Costs
France	SOGEBRAS	Costs
France	AMCF	Customer or contractual requirements
France	AMB	Compliance processes
France	Agence Maritime Malouine	Costs
Germany	ZVDS	Costs
Germany	ZVDS	Compliance processes
Hungary	HUNASBA	Not sure
Isreal	Israel Chamber of Shipping	Not Sure
Japan	Japan Association of Foreign-Trade Ship Agencies	Costs
Jordan	Jordan Shipping Association / Gargour Shipping Company	Costs
Lebanon	Lebanese Shipping Agents Syndicate	Operational planning
Mexico	AMANAC	Costs
Monaco	Marine Chartering Services	Costs
Morocco	APRAM	Costs
Mozambique	Manica Freight Services	Compliance processes



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Netherlands	VNC	Not sure
Poland	Polish Shipbrokers' Association	Costs
Slovenia	The Slovenian Ship and Freight Agents Association	Costs
South Africa	SAASOA	Compliance processes
Tunisia	All seas shipping Agency	Not sure
Ukraine	Association Of Maritime Agencies of Ukraine	Costs
United Arab Emirates	Webb Fontaine	Compliance processes
Uruguay	Centro De Navegación	Compliance processes
USA	ASBA	Costs

### Q8. To what extent do regulatory requirements influence operational or commercial decisions in your organisation?

COUNTRY	YOUR ASSOCIATION / ORGANISATION / COMPANY NAME	To what extent do regulatory requirements influence operational or commercial decisions in your organisation?
Argentina	Centro De Navegación	Significantly
Belgium	Belgian Shipping Federation NPO	Significantly
Brazil	FENAMAR	Significantly
Croatia	Dragon Maritime Adria D.O.O.	Significantly
Croatia		Moderately
Croatia	ASBAC	Slightly
Croatia	Dragon Maritime Adria Ltd	Moderately
Croatia		Moderately
Croatia	Acquera Yachting	Slightly
Denmark	Danish Shipbrokers and Port Operators	Significantly
France	SOGEBRAS	Not at all
France	AMCF	Not at all
France	AMB	Moderately



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France	Agence Maritime Malouine	Significantly
Germany	ZVDS	Significantly
Germany	ZVDS	Moderately
Hungary	HUNASBA	Moderately
Israel	Israel Chamber of Shipping	Significantly
Japan	Japan Association of Foreign-Trade Ship Agencies	Not at all
Jordan	Jordan Shipping Association / Gargour Shipping Company	Significantly
Lebanon	Lebanese Shipping Agents Syndicate	Significantly
Mexico	AMANAC	Significantly
Monaco	Marine Chartering Services	Moderately
Morocco	APRAM	Moderately
Mozambique	Manica Freight Services	Moderately
Netherlands	VNC	Significantly
Poland	Polish Shipbrokers' Association	Moderately
Slovenia	The Slovenian Ship and Freight Agents Association	Significantly
South Africa	SAASOA	Significantly
Tunisia	All seas shipping Agency	Moderately
Ukraine	Association Of Maritime Agencies of Ukraine	Significantly
United Arab Emirates	Webb Fontaine	Significantly
Uruguay	Centro De Navegación	Not at all
USA	ASBA	Significantly



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## Q9. In your opinion, maritime documentation should increasingly be digitalised (e.g., electronic Bills of Lading).

COUNTRY	YOUR ASSOCIATION / ORGANISATION / COMPANY NAME	In your opinion, maritime documentation should increasingly be digitalised (e.g., electronic Bills of Lading).
Argentina	Centro De Navegación	Strongly Agree
Belgium	Belgian Shipping Federation NPO	Agree
Brazil	FENAMAR	Agree
Croatia	Dragon Maritime Adria D.O.O.	Strongly Agree
Croatia		Strongly Agree
Croatia	ASBAC	Strongly Agree
Croatia	Dragon Maritime Adria Ltd	Agree
Croatia		Agree
Croatia	Acquera Yachting	Neutral
Denmark	Danish Shipbrokers and Port Operators	Strongly Agree
France	SOGEBRAS	Agree
France	AMCF	Agree
France	AMB	Strongly Agree
France	Agence Maritime Malouine	Neutral
Germany	ZVDS	Strongly disagree
Germany	ZVDS	Neutral
Hungary	HUNASBA	Neutral
Isreal	Israel Chamber of Shipping	Strongly Agree
Japan	Japan Association of Foreign-Trade Ship Agencies	Neutral
Jordan	Jordan Shipping Association / Gargour Shipping Company	Strongly Agree
Lebanon	Lebanese Shipping Agents Syndicate	Agree
Mexico	AMANAC	Strongly Agree
Monaco	Marine Chartering Services	Agree
Morocco	APRAM	Strongly Agree



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Mozambique	Manica Freight Services	Agree
Netherlands	VNC	Strongly Agree
Poland	Polish Shipbrokers' Association	Neutral
Slovenia	The Slovenian Ship and Freight Agents Association	Disagree
South Africa	SAASOA	Strongly disagree
Tunisia	All seas shipping Agency	Strongly Agree
Ukraine	Association Of Maritime Agencies of Ukraine	Strongly Agree
United Arab Emirates	Webb Fontaine	Strongly Agree
Uruguay	Centro De Navegación	Strongly Agree
USA	ASBA	Agree

## Q10. What do you consider to be the main barriers to digital documentation?

COUNTRY	YOUR ASSOCIATION / ORGANISATION / COMPANY NAME	What do you consider to be the main barriers to digital documentation?
Argentina	Centro De Navegación	Resistance to change
Belgium	Belgian Shipping Federation NPO	Legal uncertainty
Brazil	FENAMAR	Lack of standardisation
Croatia	Dragon Maritime Adria D.O.O.	Lack of standardisation
Croatia		Cost
Croatia	ASBAC	Lack of standardisation
Croatia	Dragon Maritime Adria Ltd	Cost
Croatia		Resistance to change
Croatia	Acquera Yachting	Resistance to change
Denmark	Danish Shipbrokers and Port Operators	Legal uncertainty
France	SOGEBRAS	Lack of standardisation
France	AMCF	Resistance to change
France	AMB	Resistance to change



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France	Agence Maritime Malouine	Lack of standardisation
Germany	ZVDS	Lack of trust in digital systems
Germany	ZVDS	Legal uncertainty
Hungary	HUNASBA	Lack of trust in digital systems
Israel	Israel Chamber of Shipping	Resistance to change
Japan	Japan Association of Foreign-Trade Ship Agencies	Technical limitations
Jordan	Jordan Shipping Association / Gargour Shipping Company	Lack of standardisation
Lebanon	Lebanese Shipping Agents Syndicate	Technical limitations
Mexico	AMANAC	Legal uncertainty
Monaco	Marine Chartering Services	Cost
Morocco	APRAM	Lack of standardisation
Mozambique	Manica Freight Services	Resistance to change
Netherlands	VNC	Cost
Poland	Polish Shipbrokers' Association	Lack of trust in digital systems
Slovenia	The Slovenian Ship and Freight Agents Association	Lack of standardisation
South Africa	SAASOA	Legal uncertainty
Tunisia	All seas shipping Agency	Resistance to change
Ukraine	Association Of Maritime Agencies of Ukraine	Resistance to change
United Arab Emirates	Webb Fontaine	Resistance to change
Uruguay	Centro De Navegación	Lack of standardisation
USA	ASBA	Resistance to change



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## Q11. How confident are you in the accuracy and reliability of digital data used in maritime operations?

COUNTRY	YOUR ASSOCIATION / ORGANISATION / COMPANY NAME	How confident are you in the accuracy and reliability of digital data used in maritime operations?
Argentina	Centro De Navegación	Highly confident
Belgium	Belgian Shipping Federation NPO	Moderately confident
Brazil	FENAMAR	Highly confident
Croatia	Dragon Maritime Adria D.O.O.	Moderately confident
Croatia		Highly confident
Croatia	ASBAC	Highly confident
Croatia	Dragon Maritime Adria Ltd	Moderately confident
Croatia		Slightly confident
Croatia	Acquera Yachting	Highly confident
Denmark	Danish Shipbrokers and Port Operators	Highly confident
France	SOGEBRAS	Slightly confident
France	AMCF	Highly confident
France	AMB	Highly confident
France	Agence Maritime Malouine	Moderately confident
Germany	ZVDS	Moderately confident
Germany	ZVDS	Slightly confident
Hungary	HUNASBA	Slightly confident
Isreal	Israel Chamber of Shipping	Highly Confident
Japan	Japan Association of Foreign-Trade Ship Agencies	Moderately confident
Jordan	Jordan Shipping Association / Gargour Shipping Company	Highly confident
Lebanon	Lebanese Shipping Agents Syndicate	Moderately confident
Mexico	AMANAC	Highly confident
Monaco	Marine Chartering Services	Moderately confident
Morocco	APRAM	Moderately confident



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Mozambique	Manica Freight Services	Highly confident
Netherlands	VNC	Moderately confident
Poland	Polish Shipbrokers' Association	Moderately confident
Slovenia	The Slovenian Ship and Freight Agents Association	Moderately confident
South Africa	SAASOA	Moderately confident
Tunisia	All seas shipping Agency	Moderately confident
Ukraine	Association Of Maritime Agencies of Ukraine	Moderately confident
United Arab Emirates	Webb Fontaine	Highly confident
Uruguay	Centro De Navegación	Highly confident
USA	ASBA	Moderately confident

### Q12. What do you consider to be the main risks associated with digitalisation?

COUNTRY	YOUR ASSOCIATION / ORGANISATION / COMPANY NAME	What do you consider to be the main risks associated with digitalisation?
Argentina	Centro De Navegación	Cybersecurity risks
Belgium	Belgian Shipping Federation NPO	Cybersecurity risks
Brazil	FENAMAR	Cybersecurity risks
Croatia	Dragon Maritime Adria D.O.O.	High implementation costs
Croatia		High implementation costs
Croatia	ASBAC	Cybersecurity risks
Croatia	Dragon Maritime Adria Ltd	Data accuracy issues
Croatia		System complexity
Croatia	Acquera Yachting	Dependence on technology
Denmark	Danish Shipbrokers and Port Operators	Cybersecurity risks
France	SOGEBRAS	Dependence on technology
France	AMCF	Data accuracy issues
France	AMB	Cybersecurity risks



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France	Agence Maritime Malouine	System complexity
Germany	ZVDS	System complexity
Germany	ZVDS	System complexity
Hungary	HUNASBA	Cybersecurity risks
Israel	Israel Chamber of Shipping	High implementation costs
Japan	Japan Association of Foreign-Trade Ship Agencies	High implementation costs
Jordan	Jordan Shipping Association / Gargour Shipping Company	Cybersecurity risks
Lebanon	Lebanese Shipping Agents Syndicate	Cybersecurity risks
Mexico	AMANAC	Lack of legal clarity
Monaco	Marine Chartering Services	High implementation costs
Morocco	APRAM	Cybersecurity risks
Mozambique	Manica Freight Services	Cybersecurity risks
Netherlands	VNC	Cybersecurity risks
Poland	Polish Shipbrokers' Association	Data accuracy issues
Slovenia	The Slovenian Ship and Freight Agents Association	Dependence on technology
South Africa	SAASOA	Lack of legal clarity
Tunisia	All Seas Shipping Agency	Cybersecurity risks
Ukraine	Association Of Maritime Agencies of Ukraine	Cybersecurity risks
United Arab Emirates	Webb Fontaine	Data accuracy issues
Uruguay	Centro De Navegación	Cybersecurity risks
USA	ASBA	Data accuracy issues



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**Q13. In your experience, what is the main barrier to implementing digital solutions and emissions-related requirements in maritime operations?**  
(Optional)

COUNTRY	YOUR ASSOCIATION / ORGANISATION / COMPANY NAME	In your experience, what is the main barrier to implementing digital solutions and emissions-related requirements in maritime operations? (Optional)
Argentina	Centro De Navegación	International policy and costs
Belgium	Belgian Shipping Federation NPO	
Brazil	FENAMAR	The lack of legal harmonisation and standardisation across jurisdictions, combined with high implementation costs and uneven technological among stakeholders. Additionally, regulatory uncertainty within parts of the sector continue to slow down adoption.
Croatia	Dragon Maritime Adria D.O.O.	
Croatia		High implementation costs
Croatia	ASBAC	High implementation costs, no standardization
Croatia	Dragon Maritime Adria Ltd	
Croatia		
Croatia	Acquera Yachting	
Denmark	Danish Shipbrokers and Port Operators	N/A
France	SOGEBRAS	
France	AMCF	
France	AMB	
France	Agence Maritime Malouine	
Germany	ZVDS	Digitization increases the administrative burden
Germany	ZVDS	Cost of implementaion and running the systems, liability for data accuracy



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Hungary	HUNASBA	resistant to change
Israel	Israel Chamber of Shipping	
Japan	Japan Association of Foreign-Trade Ship Agencies	ESPECIALLY NOTHING
Jordan	Jordan Shipping Association / Gargour Shipping Company	Legislation is also a major barrier, banks, customs, regulatory bodies, port authorities all have legislation issues that may prevent the full implementation of digital solutions especially across documentation
Lebanon	Lebanese Shipping Agents Syndicate	Cost; Resistance to Change, Legal framework; Technical implementation support.
Mexico	AMANAC	The main barrier is the regulations in Mexico, since the laws and regulations refer to DOCUMENTS and it is because of this word that the authorities resist using digital means.
Monaco	Marine Chartering Services	Fragmentation of responsibility
Morocco	APRAM	
Mozambique	Manica Freight Services	
Netherlands	VNC	
Poland	Polish Shipbrokers' Association	in point 19 I'd tick all answers.
Slovenia	The Slovenian Ship and Freight Agents Association	Employee education and training
South Africa	SAASOA	RESISTANCE TO CHANGE
Tunisia	All seas shipping Agency	Governments
Ukraine	Association Of Maritime Agencies of Ukraine	
United Arab Emirates	Webb Fontaine	Resistance to Change



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Uruguay

Centro De Navegación

In my opinion, there is no single cause or barrier to digitization; it is multifactorial. We can see that the lack of standardization, coupled with the alignment of legal regulations, cybersecurity risks, and associated implementation costs, are an integrated set of factors that contribute to achieving this goal.

USA

ASBA