



FONASBA



ECASBA

ECASBA SEMINAR 2026

Gothenburg

WELCOME TO GOTHENBURG!



FONASBA



ECASBA



Fulvio Carlini

President of FONASBA



ECASBA SEMINAR – June 2026

WELCOME TO GOTHENBURG!



FONASBA



ECASBA



Berit Blomqvist
(Sweden)



Sari Turkkila
(Finland)



Hans Nicolai Edbo
(Norway)



Jesper Sebbelin
(Denmark)



Raymond Troch
ECASBA Chair



ECASBA SECURITY SESSION

PANEL DISCUSSION:

Gateways of Resilience: Agents and Brokers on the Front Line of Maritime Security



FONASBA



ECASBA



Raymond Troch

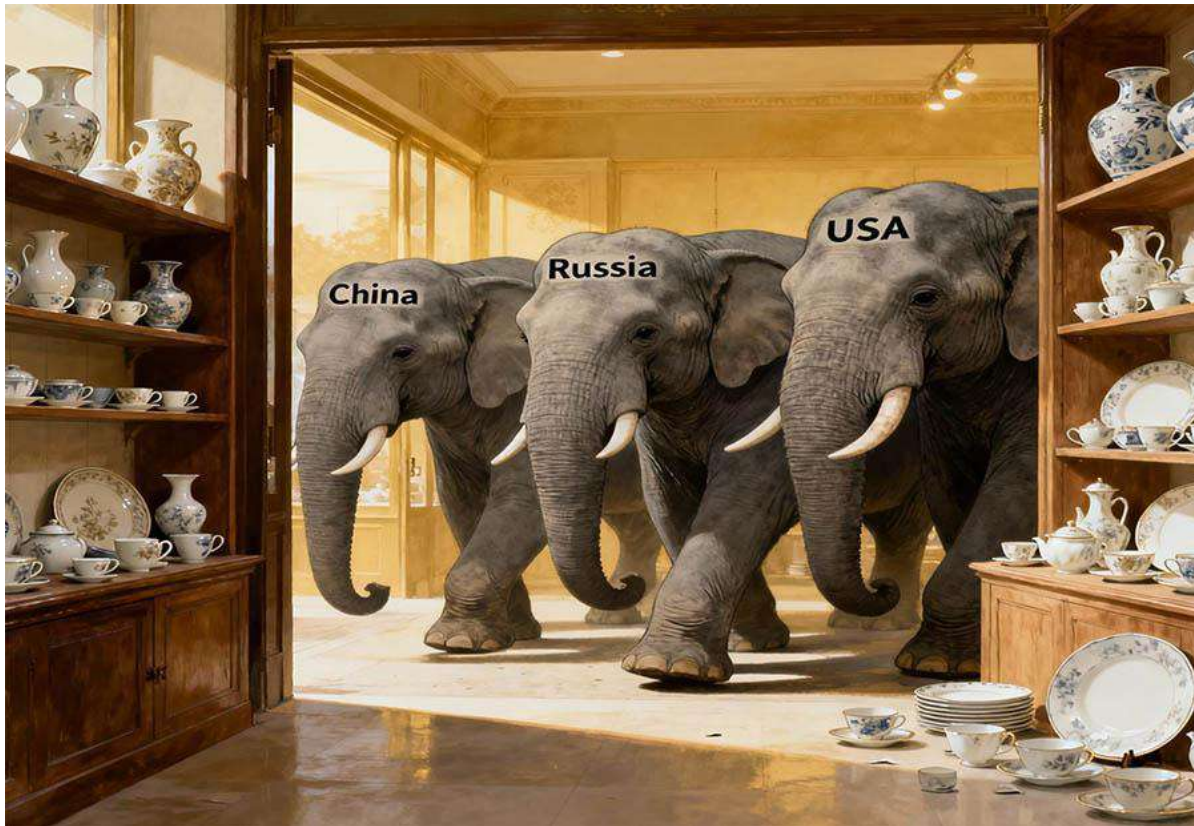
FONASBA VP Europe, ECASBA Chair



EUROPE AS GLOBAL TRAILBLAZER

Highlighted during previous FONASBA/ECASBA AGM's:

A. Geopolitical threats involving non-EU hardware-software dependencies, EU military logistics, resilience of port and harbour communities, digital environments and cybersecurity.



1. China's dual role, trade partner and threat to economic security. Investment and leverage in ports.
2. Russia opting for aggressive strategies and destabilize the West. Hybrid threats and sabotage activities.
3. USA tariff reforms.
4. Economical sanctions, grey fleet, counter measures.



EUROPE AS GLOBAL TRAILBLAZER

Highlighted during previous FONASBA/ECASBA AGM's:

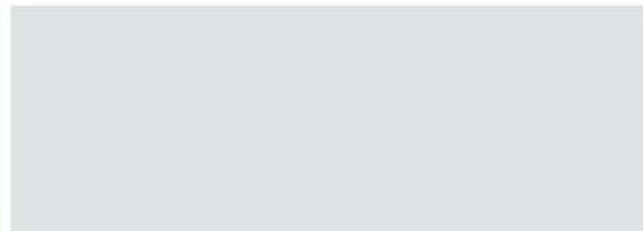
B. Criminal activities : how to protect ports & staff

ICEBERG-STRATEGY

Strategy: direct and structural approach

Direct Approach =
Law enforcement
Justice
Administrative approach sensu stricto

Structural approach =
Influence water temperature



EUROPE AS GLOBAL TRAILBLAZER

Actions & results

1. **Review of the European Ports Strategy.**
2. **No manual interventions anymore from the persons working in our offices. Full automated and certified import release procedure.**
3. **Recommendation around full screening of the persons working in the port.**
4. **Protecting and securing Ports: consensus around the review of the ISPS code .**



EUROPE AS GLOBAL TRAILBLAZER

Setting the scene: Recent changes by the EU port strategy

Review of the European Ports Strategy: The Future of European Connectivity

The context:

- EU shipowners represent 34,5 pct of global shipping in GT.
- 22.403 vessels and 570 million GT.
- EU ports handling 3.4 billion tonnes of goods, 395 M passengers/year and 423.000 direct jobs.

The Strategy contains 5 Five Pillars:

1. Competitiveness, Innovation and Digitalization
2. Protecting and Securing Ports
3. Energy Transition and Sustainability
4. Access to Funding and investment
5. Social Cohesion, Employment and Training

ECASBA SECURITY SESSION

PANEL DISCUSSION:

Gateways of Resilience: Agents and Brokers on the Front Line of Maritime Security



FONASBA



ECASBA

Moderator



Raymond Troch

FONASBA VP Europe
ECASBA Chair

Panellists



Isabelle Ryckbost

ESPO



Damian Viccars

WSC



Geert Vandervelden

NDC



ECASBA SECURITY SESSION

PANEL DISCUSSION:

Gateways of Resilience: Agents and Brokers on the Front Line of Maritime Security



FONASBA



ECASBA



Isabelle Ryckbost

ESPO



ECASBA SEMINAR – June 2026

ECASBA SECURITY SESSION

PANEL DISCUSSION:

Gateways of Resilience: Agents and Brokers on the Front Line of Maritime Security



FONASBA



ECASBA



Geert Vandervelden

NDC





“ Gateways of resilience : Agents and Brokers at the Frontline of Maritime Security ”

Nationaal Drugscommissariaat
Commissariat National Drogue
National Drugs Agency
(CND)



ECASBA Seminar 2026
Gothenburg
11/06/2026

ORGANISED CRIME

DOES NOT NEED TO OWN A SHIP,
A TERMINAL OR AN AGENCY;

IT ONLY NEEDS
ONE WEAK LINK
IN THE CHAIN.

LEVEL PLAYING FIELD



Physical security

- Barriers/fences
- Badge systems
- Biometric access
- Security services
- Police patrols
- ...



Legislation

- New Maritime Law
- Background screenings
- ISPS
- Portban
- ...



Corruption

- Invisible
- Develops gradually
- Symptoms seriously?
- Requires culture of vigilance
- Consequences later
- ...



Corruption

POSSIBLE MOTIVATIONS: OUR HYPOTHESIS

— Understanding the “why” behind vulnerable choices —



FINANCIAL PRESSURE / AMBITION

“I want to be somebody and be able to afford luxury goods.”



LOYALTY

“I’m just helping someone out.”



NORMALIZATION WITHIN TEAM CULTURE

“Everyone does it from time to time.”



PERSONAL VULNERABILITIES

“Burnout, debt, alcohol and substance abuse.”



IDENTITY-BASED PRIDE

“I am somebody in the port (or within my profession).”
→ Vulnerable to recognition, status and validation.



INTIMIDATION (PERSISTENCE / COERCION)

“I know where to find you or your family if you don’t cooperate.”



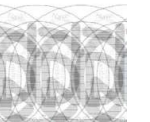
AWARENESS. INTEGRITY. RESILIENCE.
Strengthening our ports, together.



**STRONG PORTS.
SAFE FUTURE.**



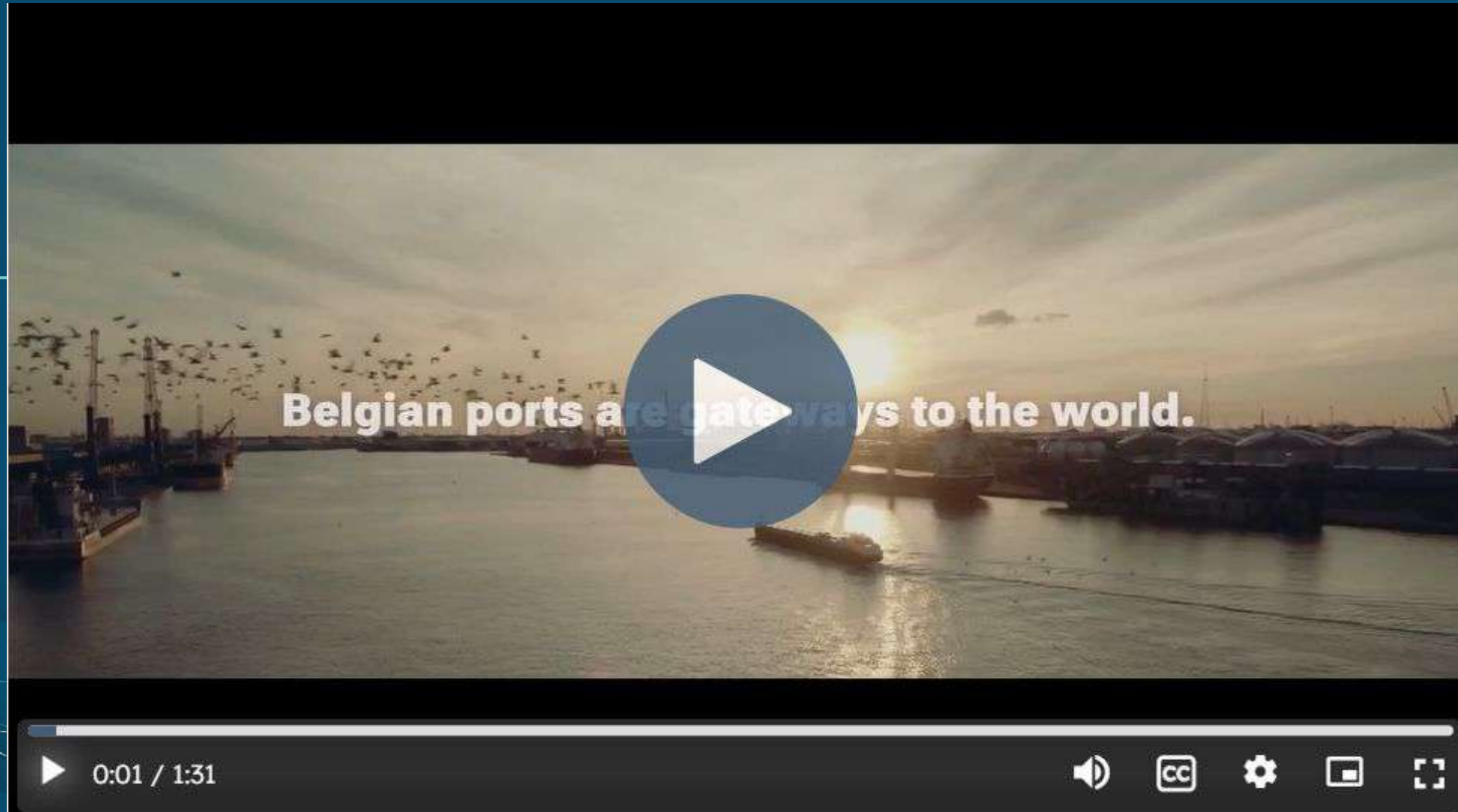
A many-headed monster with just one heart!!



Strategy of the ICEBERG

- Combine direct and indirect approaches
- Identify and map the various stakeholders
- Identify each stakeholder's role
- Coordinate stakeholders and approaches





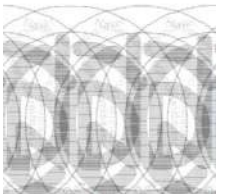
[Belgian ports join forces for integrated port security](#)



“Collaboration is the key. “No-one can fight this battle alone. Police, judiciary, customs, as well as companies, port authorities and trade unions must come together. Criminals are not confined by borders and share information quickly. If we don’t take the same approach, we will be one step behind.”



Ine van Wymersch
National Drug Commissioner



THANK YOU!!

Our ports are open
to world trade, but closed
to crime.

GEERT VANDERVELDEN
EXPERT
CNDC

ECASBA SECURITY SESSION

PANEL DISCUSSION:

Gateways of Resilience: Agents and Brokers on the Front Line of Maritime Security



FONASBA



ECASBA



Kseniia Pidruchna

Maritime Agencies of Ukraine



ECASBA SEMINAR 2026



FONASBA



ECASBA



Coffe break



ECASBA BRIEFING

European Activity Update



FONASBA



ECASBA

EUROPEAN PORTS ALLIANCE UCC REFORM



Hilde Bruggeman

BSV

ETS



Albert Oñate Lamas

ASECOB

EES/ETIAS



Jesper Sebbelin

DSPO



ECASBA BRIEFING

European Activity Update



FONASBA



ECASBA



EUROPEAN PORTS ALLIANCE

UCC REFORM

Hilde Bruggeman

BSV



ECASBA seminar 2026 - EU update

Hilde Bruggeman





be
EU
belgium24.eu



EUROPEAN PORTS ALLIANCE

PUBLIC-PRIVATE PARTNERSHIP



EPA - workshop 16 March 2026

The [European Ports Alliance Public-private Partnership](#)

- aims to combat organized crime, counter drug trafficking, and secure supply chains and ports
- brings together representatives from EU institutions, law enforcement agencies, port authorities and private sector stakeholders a.o. ECASBA
- organizes high-level, public-private partnership workshops

Important technical workshop on March 16, 2026 (Brussels):

focus on the new EU Ports Strategy, cybersecurity vulnerabilities, and infiltration of criminal networks into logistics

important part dedicated on background checks for port workers....

EPA - workshop 16 March 2026

Background checks are a central policy priority!

European Ports Strategy = pillar III = protect & secure ports

- “**Flagship action** Propose an EU framework for background checks for port workers”
- “the Commission will.... **in 2027**, propose an EU framework for background checks for port workers”.

Ship agents will very likely be in the “port workers” definition

ECASBA took the stage to share the ship agency sector perspective

Background screenings – Belgium as example

All port personnel working in a critical function are subject to background checks.

“Ship agents and their staff” are TWICE on the list of critical functions defined in the new Maritime Law on maritime security:

- 1° Functions with access to information about cargo or to the cargo itself
- 2° Functions with unrestricted access to the port facility without being part of the staff

Belgian Shipping Federation members welcomed this legislation and started screening their employees on a voluntary basis as from November 1, 2024.

- **From July 1, 2025 screenings became legally mandatory for new employees.**
- All existing employees must be screened between July 1, 2025 and June 30, 2026

Belgian shipagents were pioneers and have gained considerable on-the-field experience.



Stakeholder perspectives on the use of background checks in Port Environment

A perspective of maritime logistics

European and Belgian ship agency sector perspective

European Ports Alliance Public Private Partnership
Technical Workshop on the fight against criminal infiltration

Brussels, Monday 16 March 2026
Hilde Bruggeman – BSV on behalf of ECASBA

Sector introduction

ECASBA

Belgian association

Role of the ship agent

Port/maritime ecosystem

How are ship agents involved?

Policy considerations

Belgian example – lessons learned

Why screening matters

Clear and concise criteria

Labour/employment law framework

Support/surrounding measures

Cross-border/ecosystem dimension

Key messages



Clear and concise criteria



The success of screening systems depends largely on clear, concise and transparent criteria

- The grounds for negative advice must be stable and predictable
 - Consider upfront how personal or occasional use or possession of drugs for personal use is assessed
- Legal uncertainty and/or change in legislation should be avoided, a negative advice directly affects livelihoods and careers of people.... And has very serious consequences.
- An effective and swift procedure for appeal must be installed



Labour and employment law framework



A clear and robust labour law and social security framework is equally essential.

Involve trade unions, Labour and Employment Ministries and authorities, the Unemployment Benefits Service and representative sector organizations when drafting and introducing screening legislation

Clarity is needed from the beginning, on key issues such as

- termination grounds in case of negative advice or employee refusing screening (force majeure or dismissal for serious reason?)
- eligibility for unemployment benefits in case of negative advice
- rights of employees during appeal procedures, or in case of a negative advice overturned on appeal

There are also important practical challenges for employers

- The employer / the security verification manager is unaware of the underlying reason for negative advice. This raises questions:
 - what with possible redeployment to non-critical functions (if any)
 - how to restore trust if an employee returns to his former function after appeal
- Employment contracts in future need standard clauses for suspensive (prospective employees) conditions and resolute (existing employees) conditions
- Waiting time for screening results for prospective employees is too long as a “war for talent” is going on....



Supporting / surrounding measures



Obligatory background screenings make ongoing support of employers necessary

- Mandatory screening should be counterbalanced by awareness- and prevention measures and training to make employees more resilient.
 - ship agents (and other actors in the port ecosystem subject to obligatory screening) are unable to organize this on their own
- Mandatory screenings entail complex situations with employees who look towards the employer for help (whistleblowers, repentant persons, employees that are actually approached...)
 - ship agents (and other actors in the port ecosystem subject to obligatory screening) are not trained/equipped to deal with these situations



Supporting / surrounding measures (2)



Background screenings are also only one element of a broader security strategy

- Public authorities and ports should help provide tools, guidance and training to agents (and other actors in the port ecosystem subject to obligatory screening)
- An extension of systems like ISPS or an equivalent structure (Belgium “business units with impact on maritime security”) could offer a framework to help ship agents (and other actors subject to obligatory screening) manage the new responsibilities falling upon them and would allow effective control on compliance
- Sector organizations play an important role and can reach out to their members

Ultimately public private partnership is once again essential!



Cross-border and ecosystem dimension



Port security challenges are cross-border. Organized crime does not know borders.

- Port ecosystems are often interconnected across borders: Antwerp and Rotterdam, North Sea Ports. Dutch and Belgian co-workers are working side by side.
- Ports are hubs of employment, international by nature.
- Labour mobility within the EU is a reality.
- Many companies operate globally having headquarters in one EU country or even outside the EU...

The EU Ports Strategy rightly recognizes the need for an EU framework for background checks for port workers.

Until such framework exists, bilateral agreements between countries hosting major ports should provide interim solutions.



EU CUSTOMS REFORM



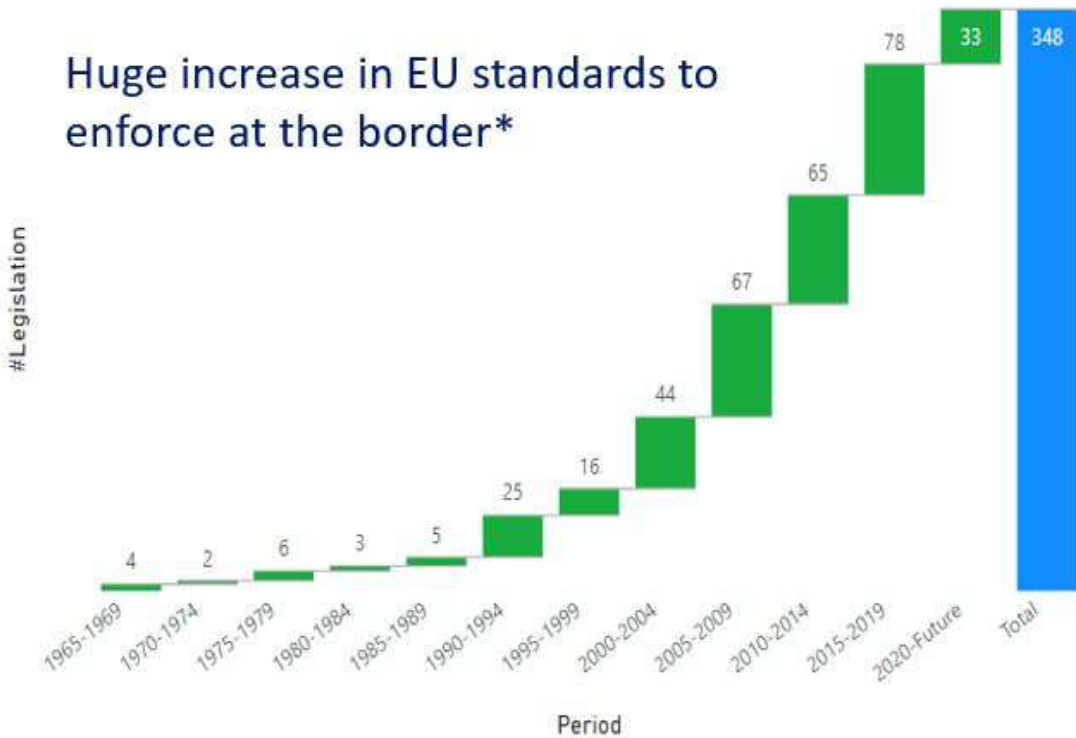
Conception

- Political guidelines 2019
- Foresight 2020
- Interim evaluation of Union Customs Code
- Wise persons Group 2021-2022

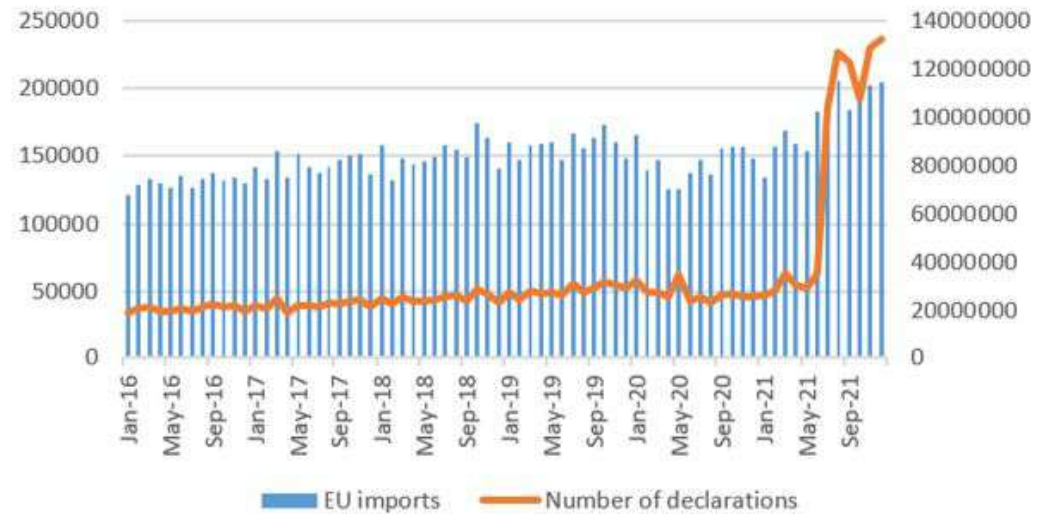
REASONS TO MODERNIZE THE EU CUSTOMS



Huge increase in EU standards to enforce at the border*



More and more items declared:



Reform pillars

Simpler Customs Union

Reinforcing objectives

Stronger Customs Union

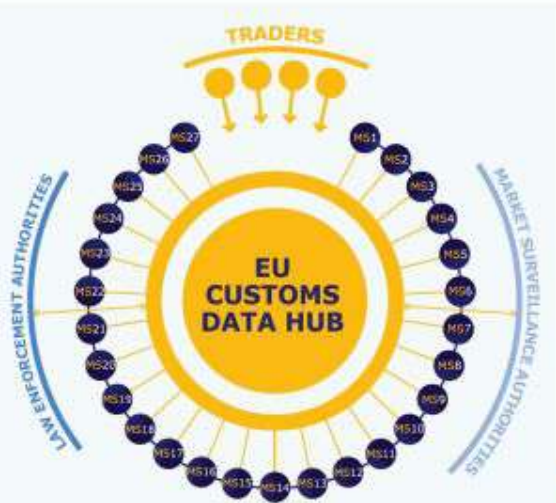
Reduced compliance costs through simpler procedures

Tailor-made e-commerce regime

Better protection of Single Market due to EU risk management

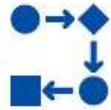
Create a true Customs UNION – acting as one across the external border

Key enablers



Customs Processes

Today



1. Carrier + declarant

2. **National customs**

3. **Case by case control**

Customs Reform: end of the customs declaration – Data Hub – EUCA

1. **Importer + EUCA**

2. Carrier

3. **Scaled impact of controls**



(re) se business data

from different actors

EU level risk analysis



supervision strategies

structured cooperation

Tomorrow

EU Customs Authority



- Decentralised agency of the EU
- Development and operation of the EU Data Hub
- EU Risk Management
 - continuous analysis of all import and export data in the EU customs data hub
 - Identify and prioritise the highest risk consignments for inspection
 - work closely with Europol, the European Public Prosecutor's Office (EPPO), Frontex, and the EU Product Compliance Network
- Coordinate crisis management
- Verify the compliance of Trust & Check traders, request reviews of Trust & Check status of traders to prevent “border shopping”.
- Seat Lille France, staff 285

EU Customs Data Hub

- Lodging of data instead of transactional declarations
- Re-use possible
- Customs data to only one central, EU level data interface
- Probably still through ICS2 “Advance cargo information” system
- Data to be lodged by importer and carrier, or persons holding the information
- Difference between commercial (sale/purchase related) data to be provided by the “importer” and operational (logistics/transport related) data – principle of multiple filing becomes Multiple



Multiple liable persons i.s.o. a single liable person

Crucial role for the importer – art.5

(12) ‘importer’ means:

- (a) in case of distance sales the deemed importer;
- (b) in other cases, the person determined by applying subsequently points (i) to (v):
 - (i) a person who has the power to determine and has determined that goods from a third country are to be brought into the customs territory of the Union,
 - (ii) any person who has taken over the power from the person in (i),
 - (iii) the succeeding person who has the power to decide and has decided to have the goods placed under a customs procedure,
 - (iv) the carrier who brings the goods into the customs territory, or
 - (v) the holder of the goods.

Carrier as “importer”

- This cascade means that a carrier (or his agent) can become the "importer" - with the full importer obligations - if no person is identified under positions (i) through (iii).
- Importer has to provide data to customs, pay customs duties and other charges, **ensure that the goods comply with fiscal and non-fiscal legislation**, notify suspicious movements
- What are the possible cases where the carrier can become the importer (transshipment?)
- What are the conditions under which (i) to (iii) are triggered, how can these parties be identified?
- How can the carrier (and his agent) avoid importer liability ???

Carrier as “gatekeeper” at the external border

- Carriers are a crucial checkpoint for customs compliance, risk management and data provision
- Carriers are the **core data providers** feeding transport/movement information into the EU Data Hub
 - Provide or make available “Advance cargo information” within specific time limits
 - Arrival notification (to be linked to the “Advance cargo information”)
 - Physically present the goods when required by the customs authorities
- Carriers can be considered as importers....

Multiple liable persons

Other persons – art.83

If the carrier does not have all necessary data for the advance cargo information / to notify the arrival the responsibility can shift to another party

- *1d. Notwithstanding the obligations of the carrier referred to in paragraphs 1, 1a and 1b, one of the following persons may notify the arrival of the goods, within the time limits referred to in those paragraphs:*
 - *(a) the person in whose name or on whose behalf the person who brought the goods into that territory acts;*
 - *(b) the person who assumed responsibility for carriage of the goods after they were brought into the customs territory of the Union;*
 - *(c) any person who immediately places the goods under a customs procedure;*
 - *(d) the holder of an authorisation for the operation of temporary storage facilities or any person who carries out an activity in a free zone.*
- *2. In specific cases, where not all the particulars of the advance cargo information referred to in Article 80(5a) on the goods can be obtained from the carrier, a subsequent carrier or other persons having that data and the appropriate rights to provide them may be required to notify the arrival of the goods to the actual customs office of first entry.*

Ship agent as customs representative for the carrier – art 27

Any person may appoint a customs representative. Such representation may be either direct in which case the customs representative shall act in the name of and on behalf of another person, or indirect, in which case the customs representative shall act in his or her own name but on behalf of another person.

- **In the name and on behalf of = mandate of an agent**

When a ship agent acts as a direct representative, they act strictly in the name and on behalf of their principal (the shipowner, operator, or charterer).

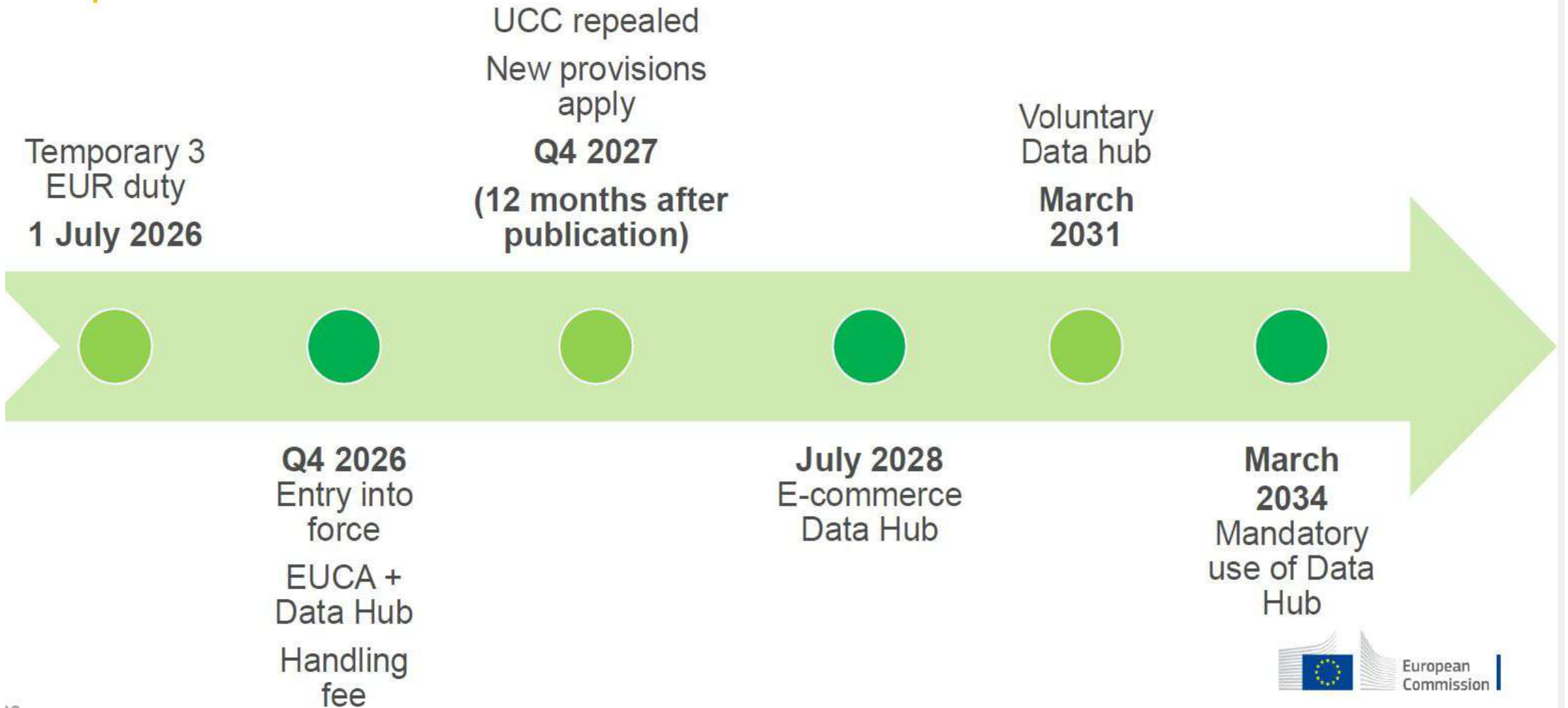
This legally separates the agent from direct liability for duties, cargo claims, or customs debts, placing those responsibilities entirely on the principal

Ship agent as “importer” ? – art 27

Direct representation is **not possible** when the importer or exporter is established outside the EU:

- *An indirect customs representative acting in his own name but on behalf of an importer or exporter that is not established in the customs territory of the Union shall be considered the importer or exporter for the purposes of Articles 20(1) and Article 22 (1), respectively.*

Implementation timeline



What about the points of concern that we have raised? (ECASBA plenary in Istanbul)

😊 The Temporary Storage issue was solved as the 90-day limit from the current UCC, with the possibility of extension in exceptional cases was kept.

😞 The Importer Definition is still determined by a cascade of five positions with the carrier in 4th position.

😞 Customs Infringements and Sanctions

- ☐ The title was changed to “penalties” and the substance of this chapter went astray completely.
- ☐ Only left is a non-binding list of factors to which Member States shall give "due regard" when deciding on penalties. Member States must ensure that at least the listed acts or omissions are subject to penalties under their national law.

ECASBA BRIEFING

European Activity Update



FONASBA



ECASBA



ETS

Albert Oñate Lamas

ASECOB



ECASBA SEMINAR 2026 GOTHENBURG SWEDEN



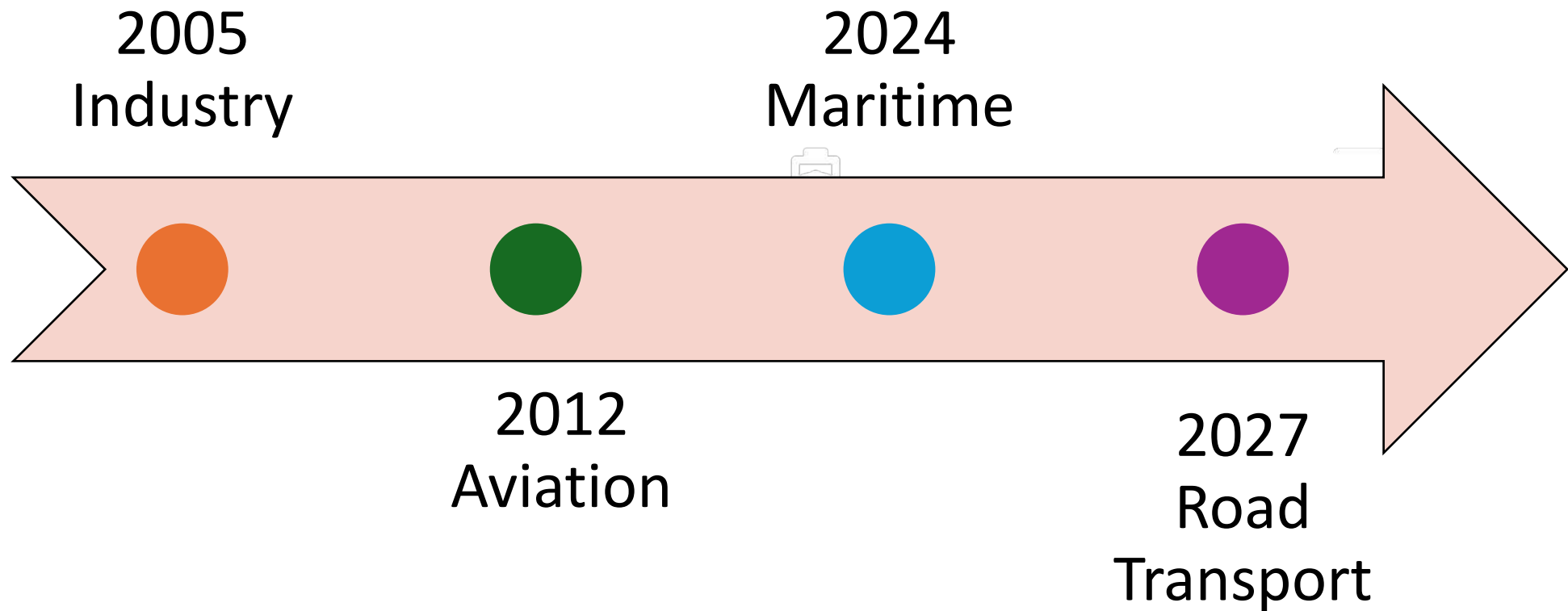
The EU Emissions Trading System & Maritime Transport

Carbon pricing at sea — borders, leakage, transparency and the road to a level playing field



Albert Oñate
Director





Not all transport modes entered ETS at the same time and under the same conditions

ETS Impacts are Pan-European



North Europe



South Europe

Algeiras, Valencia, Piraeus, Genoa

Transshipment exposed to nearby non-EU hubs (Tanger Med, East Port Said).



East Med

ETS impacts are not limited to one region. They affect the entire European logistics ecosystem

EU Policy Is Not Aligned With the IMO



EUROPEAN UNION — EU ETS

- Hard cap-and-trade: a real carbon price (\approx €70–80 / t CO₂).
- Regional scope — voyages to/from EU ports only.
- Already in force; 100% compliance from 2026.
- Penalty €100 / t for missing allowances.

VS



IMO — NET-ZERO FRAMEWORK

- Fuel-intensity standard + weak hybrid pricing.
- Global scope — all international voyages.
- Global implementation remains under discussion.
- Compliant ships may pay nothing for residual emissions.

A binding regional price runs ahead of a softer, delayed global rule — leaving operators exposed to two diverging regimes.

Carbon emissions has no borders



Same air. Different invoice.

Do emissions stop at political borders?

Does Co2 require customs clearance?

Can Nox distinguish between EU and non-EU ports?

The atmosphere is global. ETS remain regional

First Unintended Consequence: Traffic diversion

6

Both ESPO and southern port authorities report early signs of transshipment relocating to neighbouring non-EU hubs — and box volumes shifting toward the UK in the north.

\$2.9bn

EU CONTAINER ETS BILL

Vessel costs for year 2024

65%

LEAKAGE TRIGGER

Transshipment share rule for neighbouring ports

Non-EU

STILL CHEAPER

Calling a non-EU hub remains favourable even under the clause

WHERE THE BOXES GO



Tanger Med

Morocco — main southern alternative, but in short will appear **Nador West**



East Port Said

Egypt — flagged by the Commission



Tekirdağ / Turkey

Asyaport & Aegean terminals



UK hubs

Northern range re-routing

The transshipment clause (terminals < 300 nm with > 65% transshipment) is only a partial fix — evasion persists.

Second Unintended Consequence : Investment Diversion

EU Ports

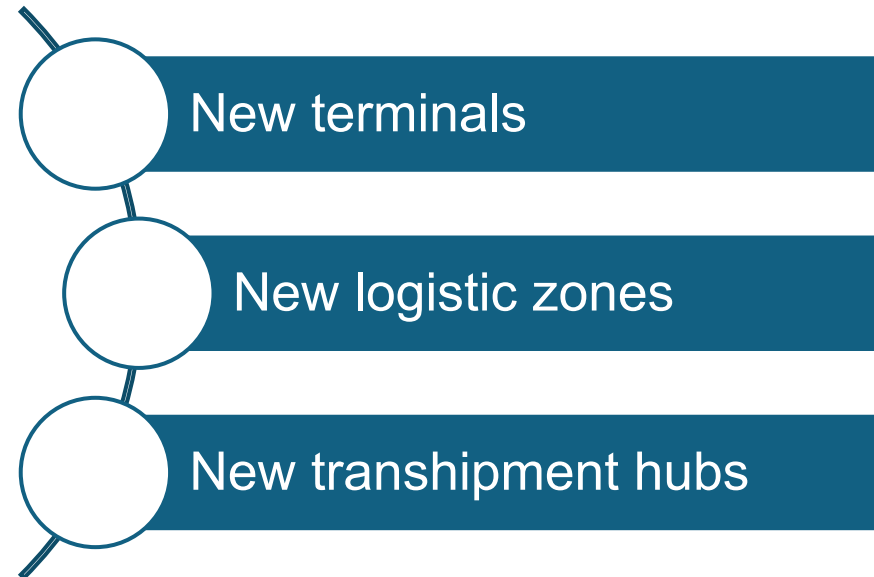
€

- Hard cap-and-trade: a real carbon price (\approx €70–80 / t CO₂).
- Regional scope — voyages to/from EU ports only.
- Already in force; 100% compliance from 2026.
- Penalty €100 / t for missing allowances.



Non EU Ports


Port Investments



Cargo can return. Infrastructure investments rarely do

Third Unintended Consequence: Modal Shifts

A regional carbon cost on shipping can ripple into hinterland logistics — pushing some flows away from rail and back onto trucks, the opposite of the policy's intent.



RAIL

Lower-carbon inland mode losing share when port economics shift.



ROAD

Trucking absorbs displaced flows — higher emissions per tonne-km.
More congestion on our highways.

Emerging concern: could carbon pricing distort modal choices within European supply chains?

Malta
Corsica
Sjaelland
Spitsbergen
Sicily
Creta
Ireland
Balearic
Madeira
Edgeoya
Sardinia
Cyprus
Canary
Nordaustlandet
Azores

Economic impact

Higher transport costs affect food, medicines, energy and consumer goods

Territorial cohesion

European islands depend on maritime links for their integration into the single market

Policy challenge

How can Europe decarbonise maritime transport without increasing territorial inequality?



Trucking absorbs displaced flows — higher emissions per tonne-km.
More congestion is our highways.

Maritime transport is not an option for islands. It is a necessity

Transparency: Where Does the Money Come and Go?

Two transparency challenges: ETS cost calculation and the effective use of ETS revenues.

)

Carriers

Complex calculation methodologies
Time gaps between quoting, collection and payments

EU authorities

Process must be simplified
Reduce payments and reimbursement delays

National governments

Full reinvestment of ETS revenues
Revenues should support maritime sector

WHAT THE INDUSTRY ASKS FOR



Per-voyage ETS line items — not annual estimates.



Transparent carrier surcharges in a volatile market



Efficient State collection from shipping lines.



Public reporting on how ETS revenue is spent.

Transparency creates trust

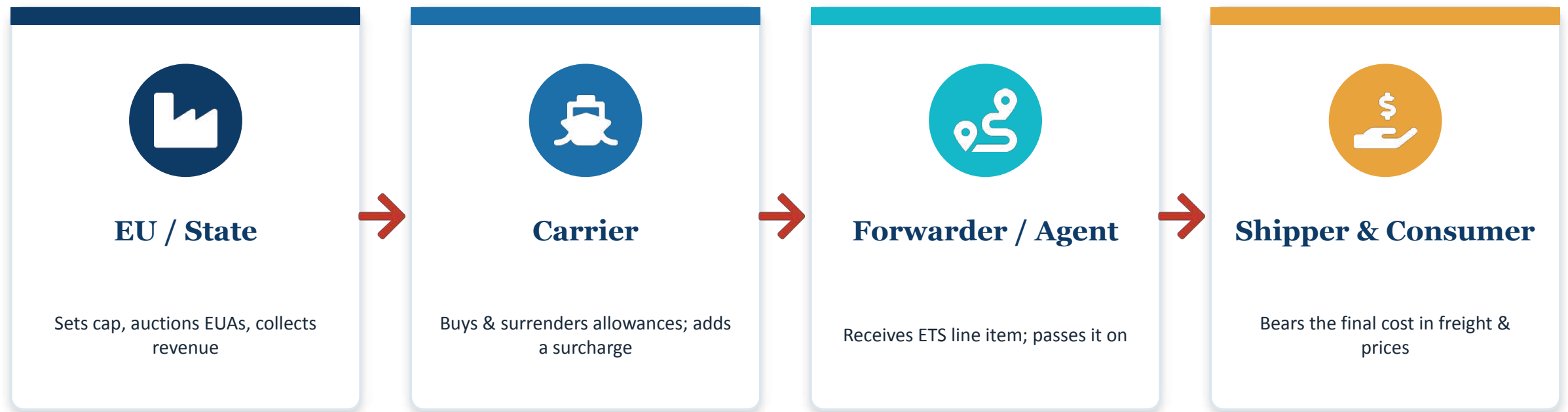
Beyond the carbon price, the ETS layers monitoring, reporting, verification and surrender duties onto already complex EU procedures — a real cost for ship agents and operators.



Decarbonisation should not mean multiplying bureaucracy.

Who Actually Pays the Carbon Bill

The carrier is liable to surrender allowances — but the cost flows down the chain to forwarders, shippers and ultimately consumers.



ETS now represents an estimated 6–12% of freight cost on EU-touching trades — material and rising.

Key Takeaways for Ship Agents



1

It's regional, not global

The EU ETS prices EU-linked voyages while the IMO framework lags — expect divergence to persist.



2

Leakage is real

North and south, traffic is already shifting to non-EU ports and back to road; the clause is only partial.



3

Demand transparency

Insist on per-voyage line items and push States to publish how revenue is spent.



4

Budget for full cost

100% coverage plus CH₄/N₂O from 2026 makes ETS a permanent, sizeable line on every EU call.



Thank you

Questions & discussion welcome.

Albert Oñate

Director — ASECOP

European Conference of Ship Agents & Brokers



ECASBA BRIEFING

European Activity Update



FONASBA



ECASBA



EES/ETIAS

Jesper Sebbelin

DSPO



A VERY NORDIC IDEA

What if... the Nordic countries
were only one?



FONASBA



ECASBA



Christopher Pålsson

Maritime-Insight



Niklas Bengtsson

Maritime-Insight



What if...

...the Nordic countries were only one?

“A very Nordic idea”, or an attempt at Making Scandinavia Great Again?

Christopher Pålsson
Managing Director, Partner

Niklas Bengtsson
Director, Partner



The material and the information contained herein (together, the "**Information**") are provided by Maritime Insight Göteborg AB ("**maritime-insight**") for general information purposes.

The Information is drawn from maritime-insight's proprietary data and other sources. maritime-insight advises that: (i) any Information extracted from maritime-insight's databases is derived from estimates or subjective judgments; (ii) any Information extracted from the databases of other maritime data collection agencies may differ from the Information extracted from maritime-insight's database; (iii) whilst maritime-insight has taken reasonable care in the compilation of the Information and believes it to be accurate and correct, data compilation is subject to limited audit and validation procedures and may accordingly contain errors; (iv) the provision of the Information does not obviate any need to make appropriate further enquiries; (v) the provision of the Information is not an endorsement of any commercial policies and/or any conclusions by maritime-insight and its 'connected persons', and is not intended to recommend any decision by the recipient; (vi) shipping is a variable and cyclical business and any forecasting concerning it may not be accurate. Any future data contained herein are only estimates. maritime-insight and its connected persons make no representations or warranties of any kind, express or implied about the completeness, accuracy, reliability, suitability or availability with respect to the Information. Any reliance placed on such Information is therefore strictly at the recipient's own risk.

This Information is confidential and is solely for the internal use of the recipient. Neither the whole nor any part of the Information may be disclosed to, or used or relied upon by, any other person or used for any other purpose without the prior written consent of maritime-insight. Especially, the information is not to be used in any document for the purposes of raising finance whether by way of debt or equity. All intellectual property rights are fully reserved.

To the extent permitted by law, maritime-insight and its connected persons shall not be liable to the recipient or any third party for any loss or damage of any kind arising out of or in connection with the Information, including without limitation any direct, special, indirect or consequential damages (eg damage for loss of business or loss of profits) whether caused by tort (including negligence), breach of contract or otherwise, even if foreseeable. These exclusions do not apply to (i) death or personal injury caused by the negligence of maritime-insight and its connected persons or (ii) the liability of maritime-insight and its connected persons for fraudulent misrepresentation.

In this disclaimer 'connected persons' means, in relation to maritime-insight, the respective directors, officers, employees and agents of maritime-insight.

This disclaimer shall be governed by and construed in accordance with Swedish Law.

Maritime Insight Göteborg AB, Store Udds väg 51, 423 61, Sweden.

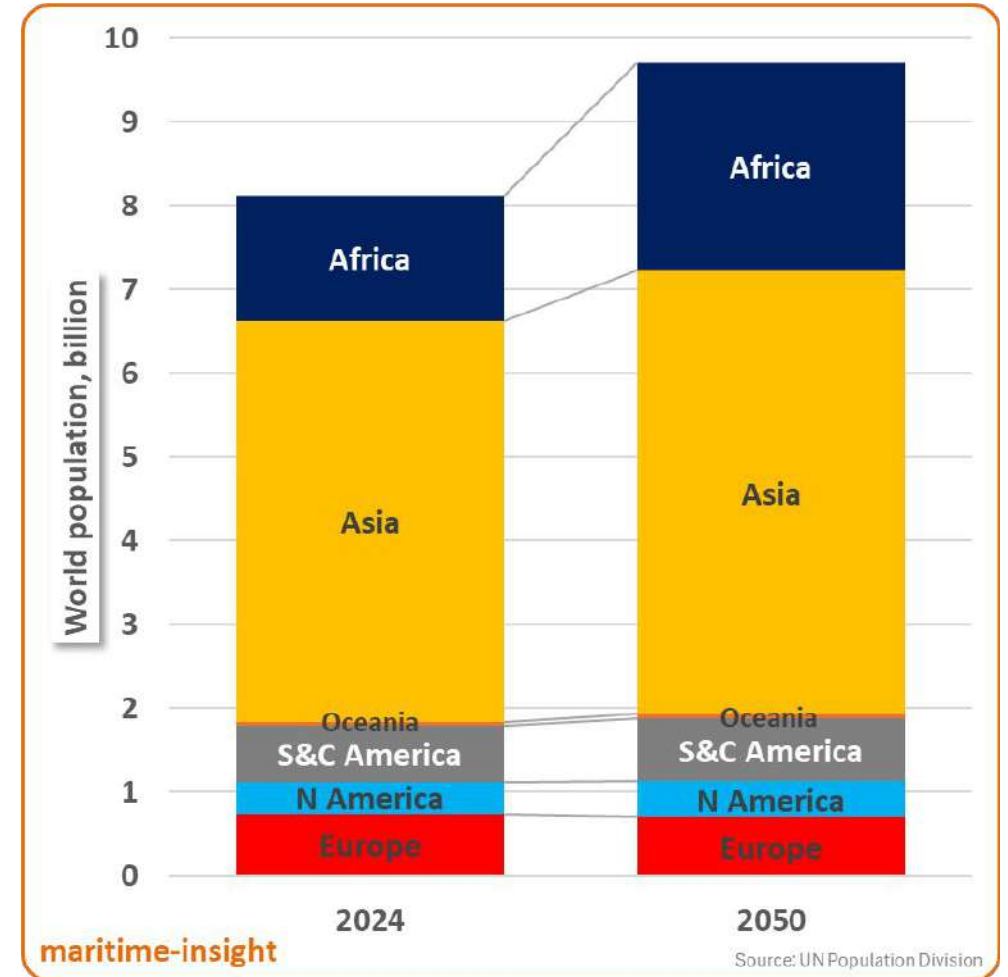
Long-term (2050) global demand drivers

Africa, Asia & Latin America

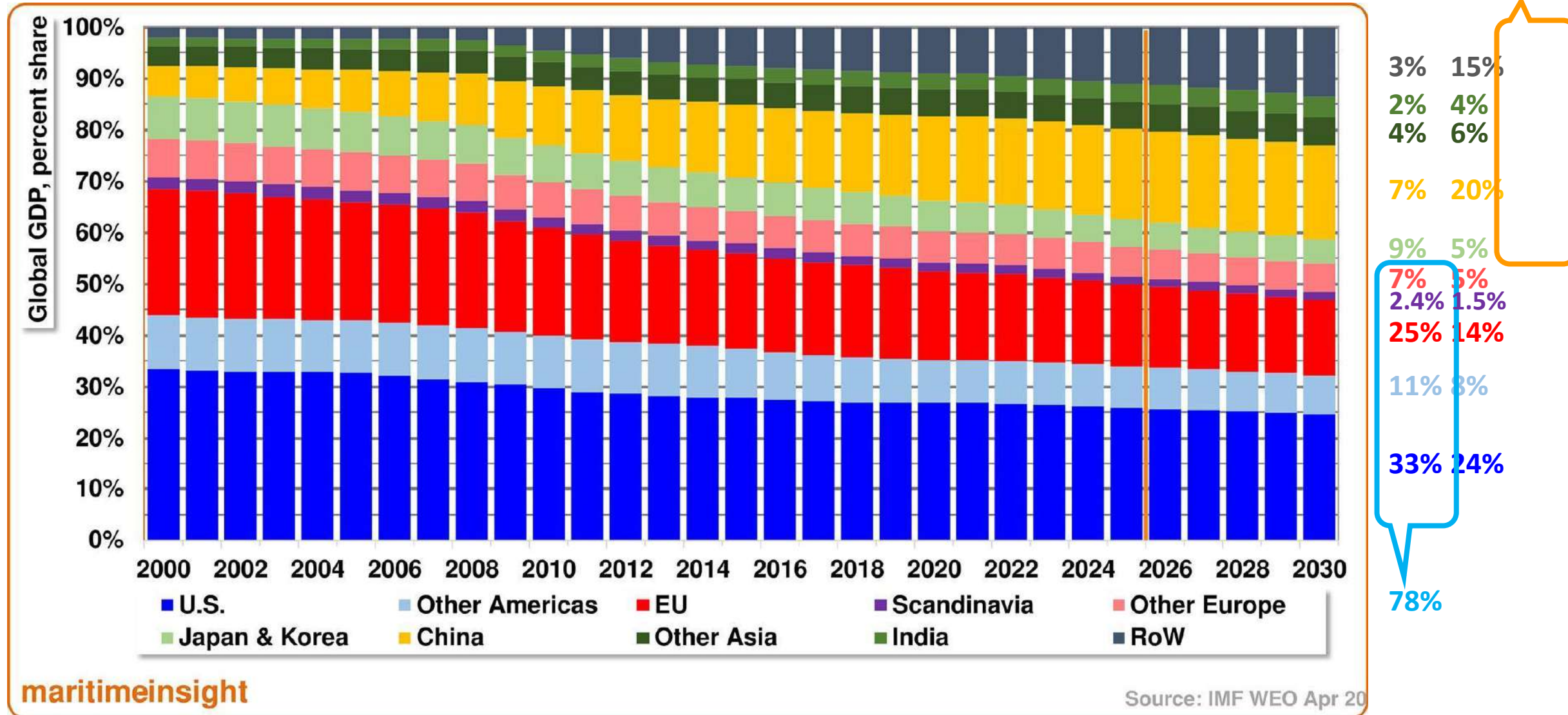
- +1.5bn people need for more/new:
 - Foodstuff, grain, fertilizers
 - Housing & workplaces
 - Energy demand
 - Infrastructure
 - Vehicles
 - Communication systems & equipment
 - Urbanisation in Africa up 700 million people
 - 450 more million-sized cities in Africa
- ≈750m new mid-income earners
 - Upgrade & renewal of infrastructure, power systems, transports, housing...

OECD countries

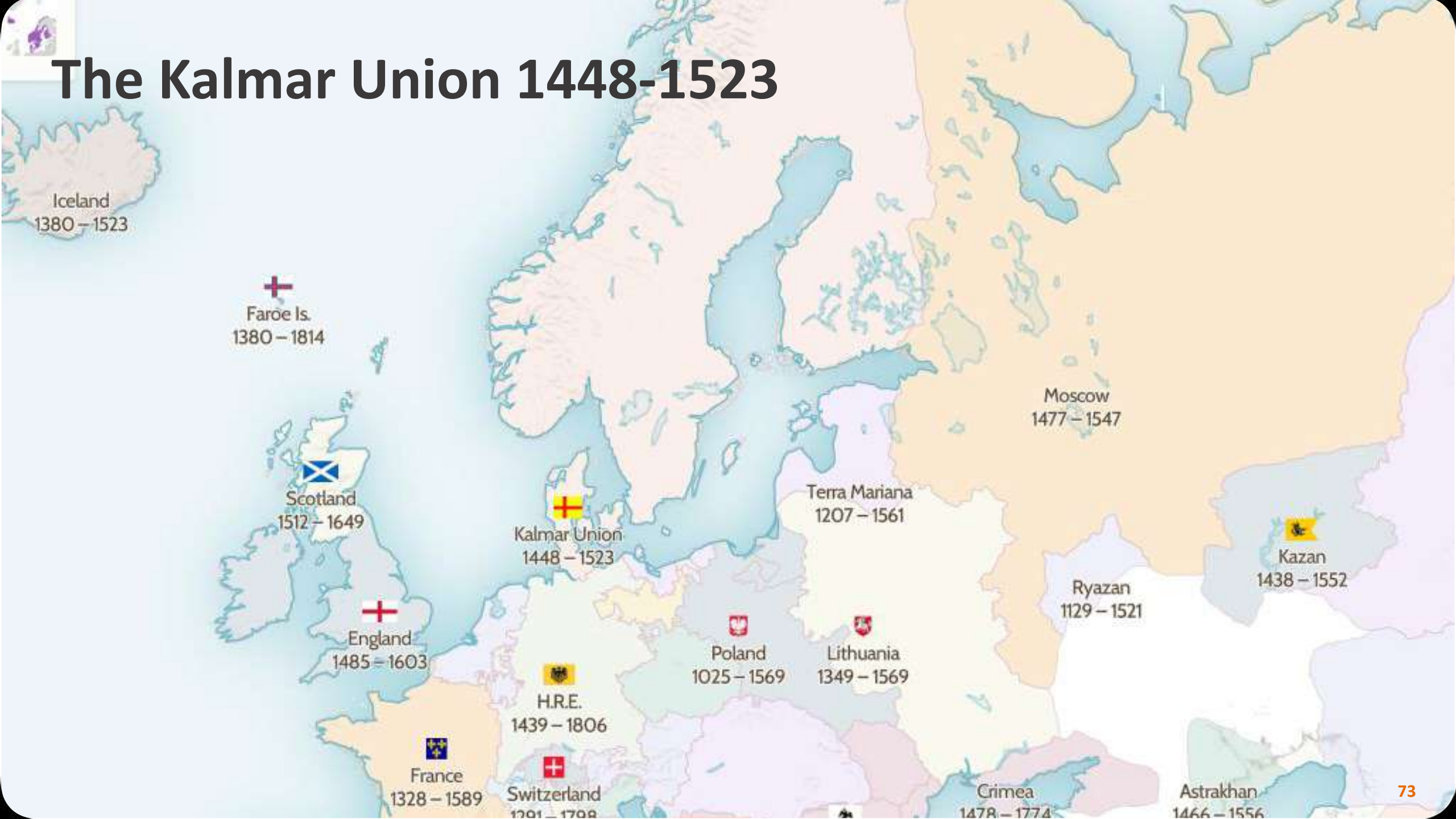
- Upgrade & renewal of infrastructure, power systems, transports, housing...



The global economy is moving East – shipbuilding is already there



The Kalmar Union 1448-1523



Nordic Shipping Business Archetypes



Population 27.7 million, GDP \$2 trillion, fleet 120M gt 434Mt seaborne exports and imports.

- Population: 10.7 million
- GDP: \$669bn
- Owned fleet: 8.6Mgt/7.7Mdwt
- Seaborne exports: 82Mt, imports: 65Mt.
- Olympic medals: 11+18=29



- Population: 5.9 million
- GDP: \$462bn
- Owned fleet: 40.5Mgt/47.9Mdwt
- Seaborne exports: 23Mt, imports: 35Mt.
- Olympic medals: 9+1=10



- Population 5.5 million
- GDP \$531bn
- Owned fleet: 68.5Mgt/90.5Mdwt
- Seaborne exports: 135Mt, imports: 26Mt.
- Olympic medals: 8+41=49



- Population 5.6 million
- GDP \$317bn
- Owned fleet: 2.5Mgt/2.2Mdwt
- Seaborne exports: 37Mt, imports: 31Mt.
- Olympic medals: 0+6=6



Total number of Scandinavian Olympic medals: 94 (3rd in the world after US & China)

The industrial base has formed the shipping industry in each country

- Forest industry
- Iron ore mining & steel industry
- High-tech industrial manufacturing
- Fossil-free power generation
- Negative GHG emissions



- Trade and logistics services
- Agriculture & food production
- Wind turbine manufacturing
- Pharmaceutical industry
- Almost fossil-free power generation



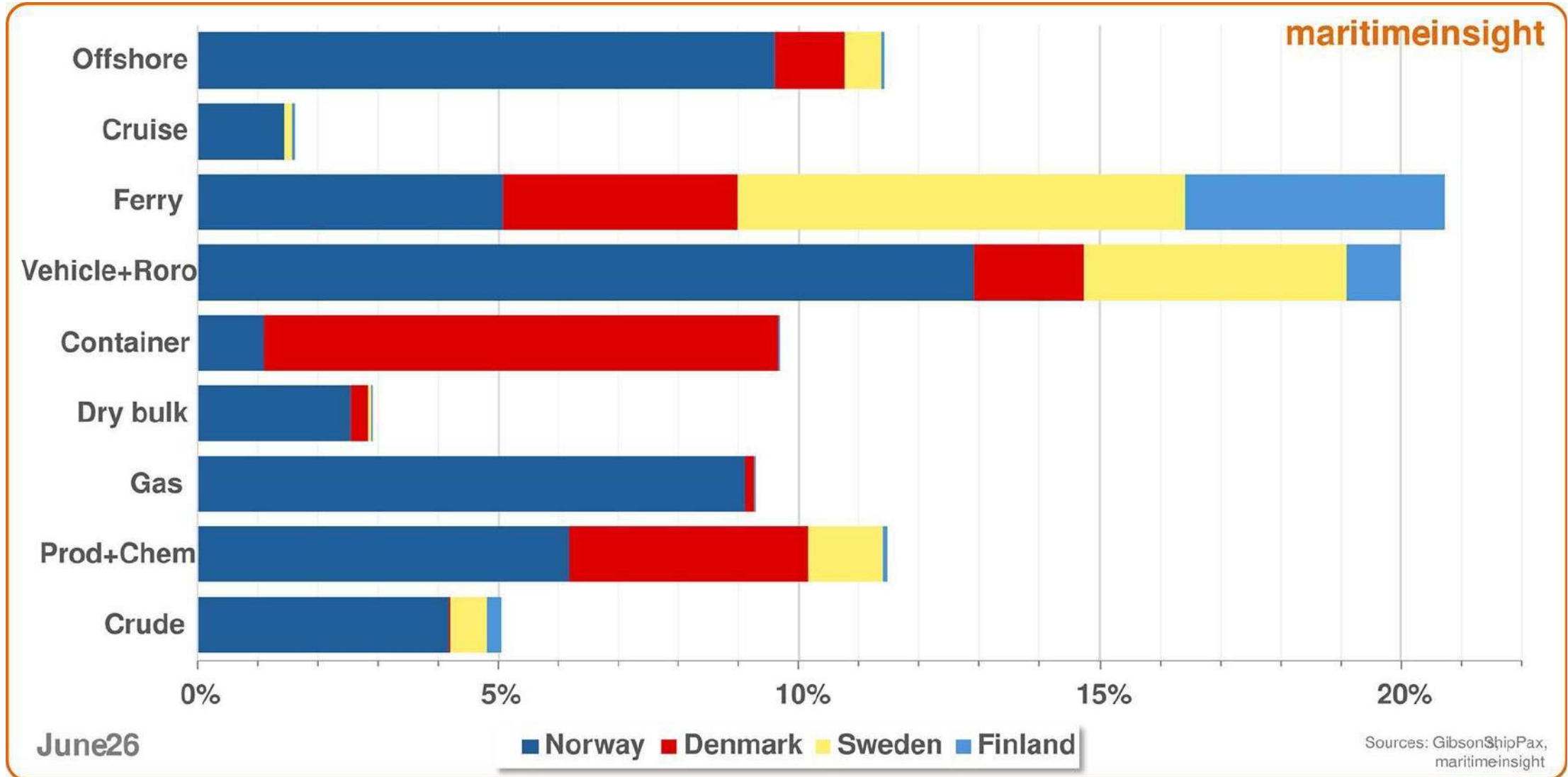
- Oil and gas production
- Maritime and offshore services
- Fishing, seafood & aquaculture
- Fossil-free power generation
- Low GHG emissions



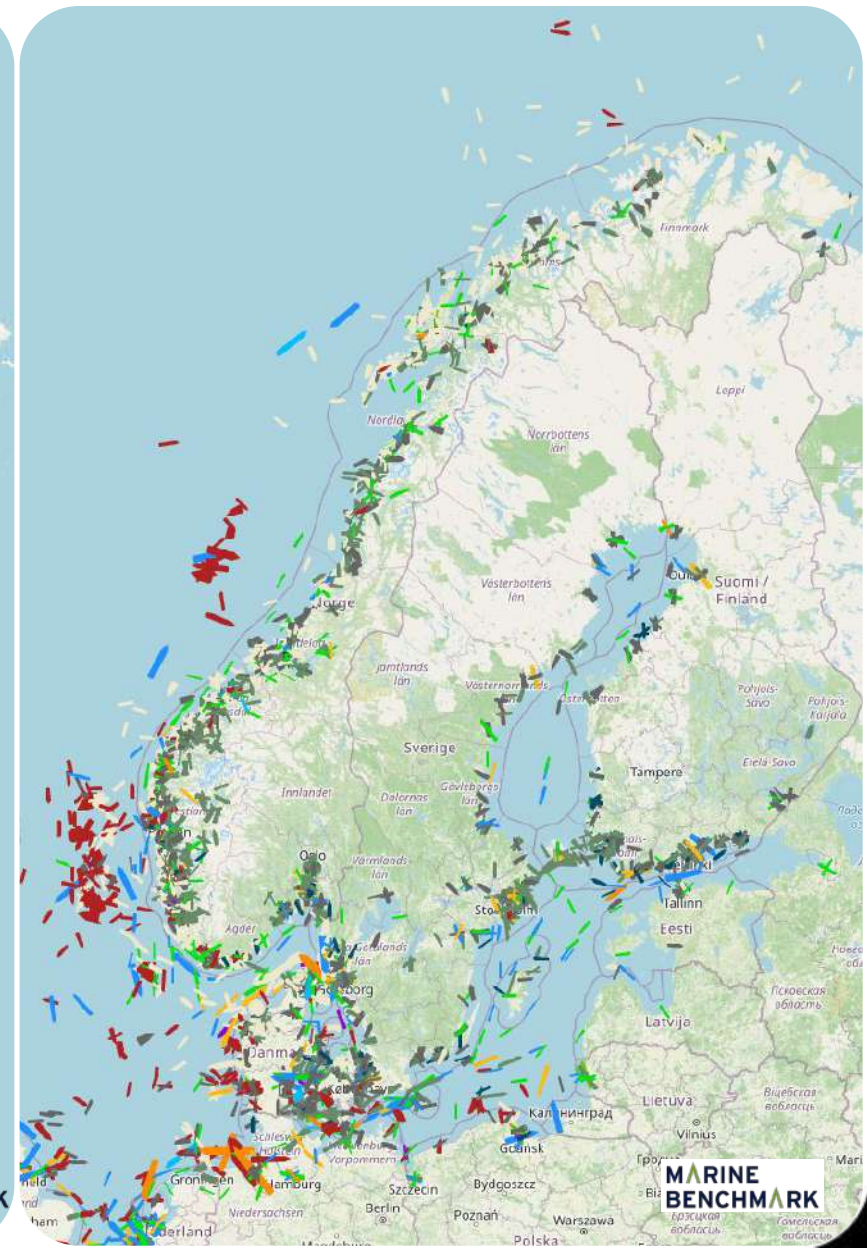
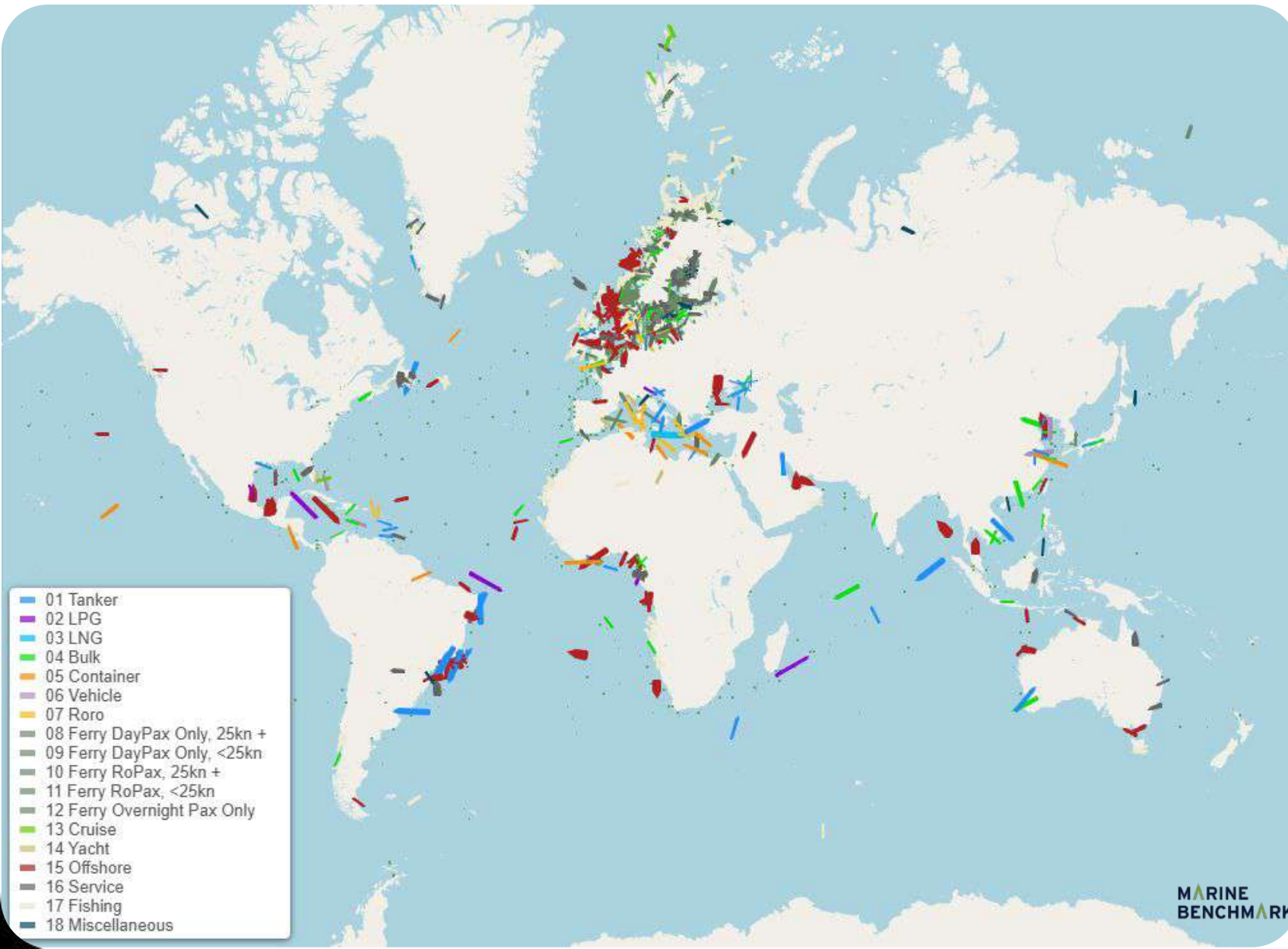
- Forest industry
- Shipbuilding industry; ice, cruise ...
- Metals and minerals
- ICT, software & electronics
- Almost fossil-free power generation



Scandinavian share of world fleet gt by type shows the relative strength in the different shipping markets.



Scandinavian ship owners trade globally



Scandinavian ship owners are early adopters of new solutions

| | Fleet | | | | Orderbook | | | |
|--------------------|---------------|------------------|-------------|-------------|--------------|----------------|-------------|-------------|
| | # ships | 1,000 gt | # ships | 1,000 gt | # ships | 1,000 gt | # ships | 1,000 gt |
| Scandinavia | 3,744 | 118,601 | 100% | 100% | 353 | 20,352 | 100% | 100% |
| → Alternative | 252 | 6,001 | 7% | 5% | 59 | 3,076 | 17% | 15% |
| Conventional | 3,264 | 101,728 | 87% | 86% | 209 | 8,463 | 59% | 42% |
| → LNG | 228 | 10,873 | 6% | 9% | 85 | 8,813 | 24% | 43% |
| NW Europe | 5,318 | 116,491 | 100% | 100% | 533 | 21,246 | 100% | 100% |
| Alternative | 105 | 2,735 | 2% | 2% | 33 | 1,083 | 6% | 5% |
| Conventional | 5,071 | 101,966 | 95% | 88% | 427 | 13,234 | 80% | 62% |
| LNG | 142 | 11,790 | 3% | 10% | 73 | 6,930 | 14% | 33% |
| RoW, | 49,438 | 1,415,799 | 100% | 100% | 4,850 | 281,040 | 100% | 100% |
| Alternative | 482 | 17,547 | 1% | 1% | 341 | 28,756 | 7% | 10% |
| Conventional | 47,644 | 1,271,844 | 96% | 90% | 3,613 | 154,154 | 74% | 55% |
| LNG | 1,312 | 126,408 | 3% | 9% | 894 | 98,130 | 18% | 35% |
| Total | 58,500 | 1,650,891 | | | 5,734 | 322,638 | | |

The world 25 years from now

- Asia, Africa and Latin America

- More:

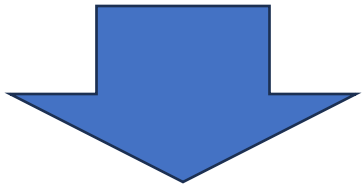
- people
- high- & mid-income earners
- economic action
- trade, mostly carried at sea

- Scandinavia

- Low population growth
- Focus on high-tech, trade, service, shipping and logistics
- More trade, mostly carried at sea
- United by EEA/EFTA/EU, NATO, Nordic Defence Cooperation, language, culture
- AI & server centres benefit from cooler climate and clean energy
- United and divided by sports

What if....?

- Complete advanced industrial base, incl high-end defence industry.
- Source of most of the crucial commodities, incl energy.
- Export oriented.
- Top-notch maritime services (excl large dry bulk).
- Strong armed forces; air, sea, land, tech.
- Efficient agricultural sector.



- Resilient.
- Trail-blazing.

Thank you



Christopher Pålsson
chris@maritime-insight.com

Niklas Bengtsson
niklas@maritime-insight.com

ECASBA SEMINAR 2026



FONASBA



ECASBA



Lunch break



MARKET UPDATE

Market Update, Including The Energy Transition



FONASBA



ECASBA

Moderator



Hans Nicolai Edbo

Norwegian Shipbrokers
Association

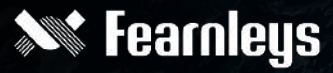


Dag Kilen

Head of Research & Senior
Advisor, Fearnley



ECASBA SEMINAR – June 2026



Market Perspective

S
ECASB | June
2026
Dag Kilén
Head of Research
d.kilen@fearnleys.com



Just when the Three Cornerstones of Trump's Playbook seemed clear...

McKinley- Nomics



Project 2025



- Expand Presidential Power
- Restructure Federal Bureaucracy
- Immigration
- Fossil Energy prioritization/ Rollback of Climate Policies
- More Nationalist, less Multilateral Foreign Policy approach
- Remove DEI and other "woke" themes
- And more...

Monroe Doctrine



Market Perspectives

Some Background Understanding

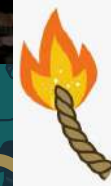
Some Key Points to Understand about the Conflict:

- Continuation of the 12-Day War
- Naval Capacity vs Blockade, Mine-Sweeping & Convoys
- The Launchers vs Interceptors Dilemma
- PetroDollar, EuroDollar & Imperial Overreach....
- So, where are we now?....



Market Perspectives

IRGC lit a fuse by taking Hormuz hostage....."Bombs" going off early across Asia/Oceania.....
U.S. / OECD SPR release distributes the "pain", but also builds complacency...

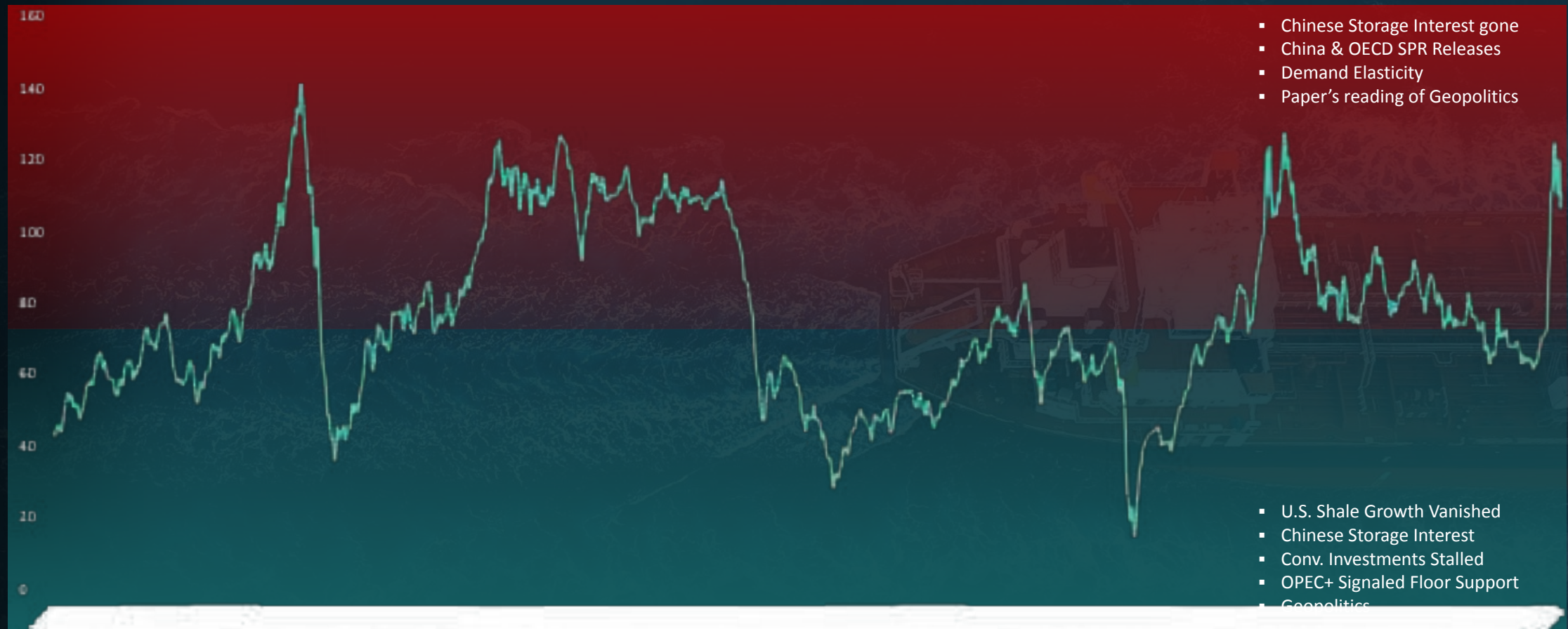


Australian & Japanese TV News have Celebrated the arrival of Cargoes



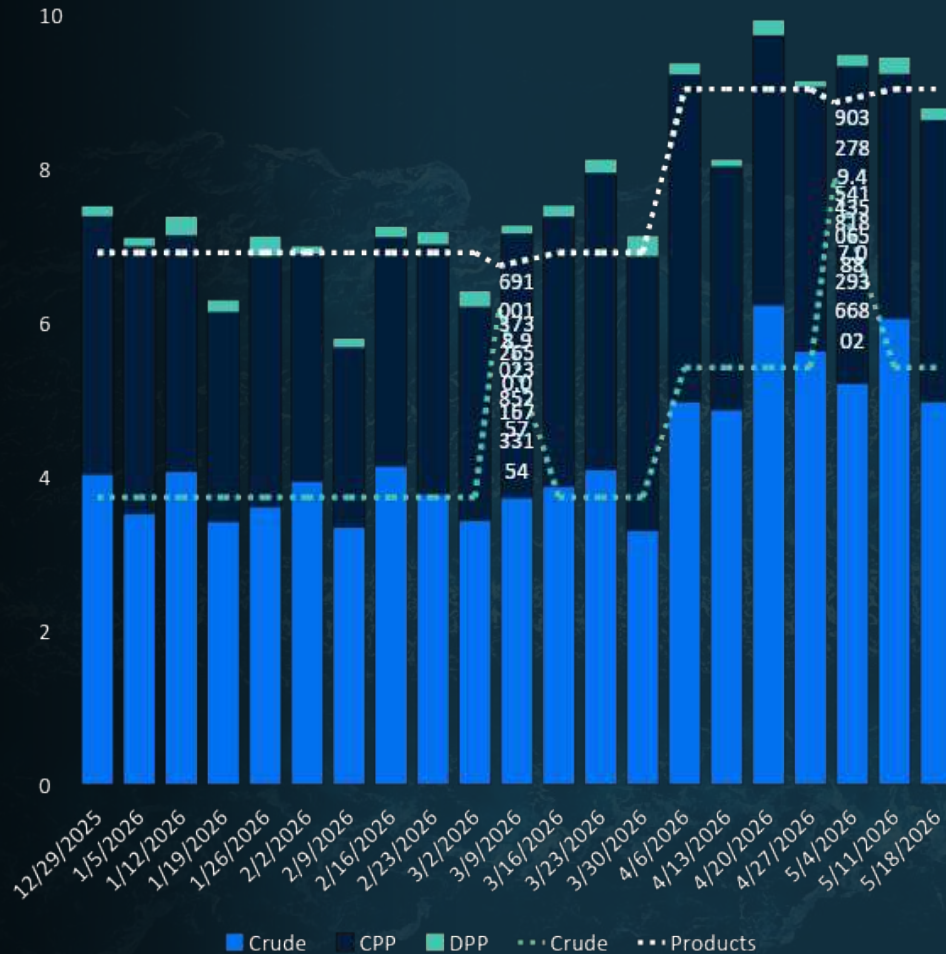
The Oil's Price-Collar – From Pushing Lower to Upper Bound

Brent Crude Oil Price – Current Price Collar Dynamics pushing Upper Bound

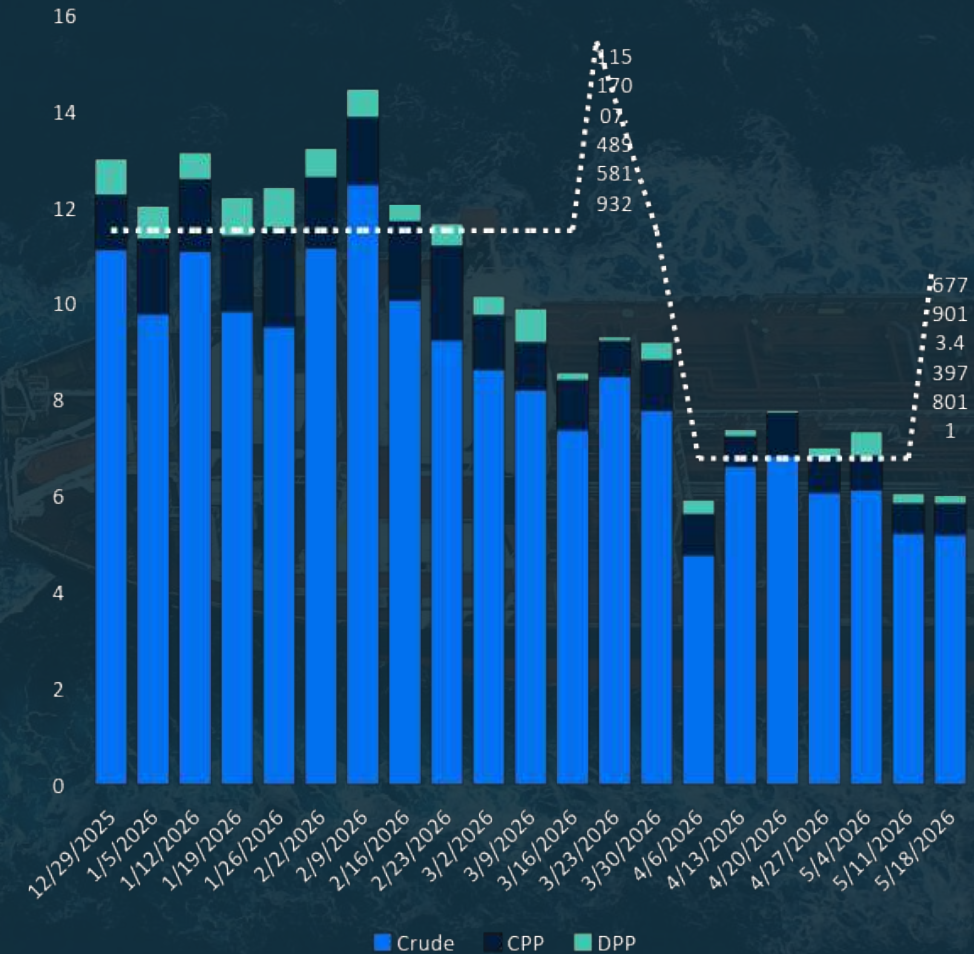


Evidence of the U.S. & China using their SPR's...Japan doing the same

U.S. Exports departures since Jan'26, mbpd by departure



Chinese Imports departures since Jan'26, mbpd by departure



Three-Layered Post-War Demand Comeback – Unless Stagflation wins....

1

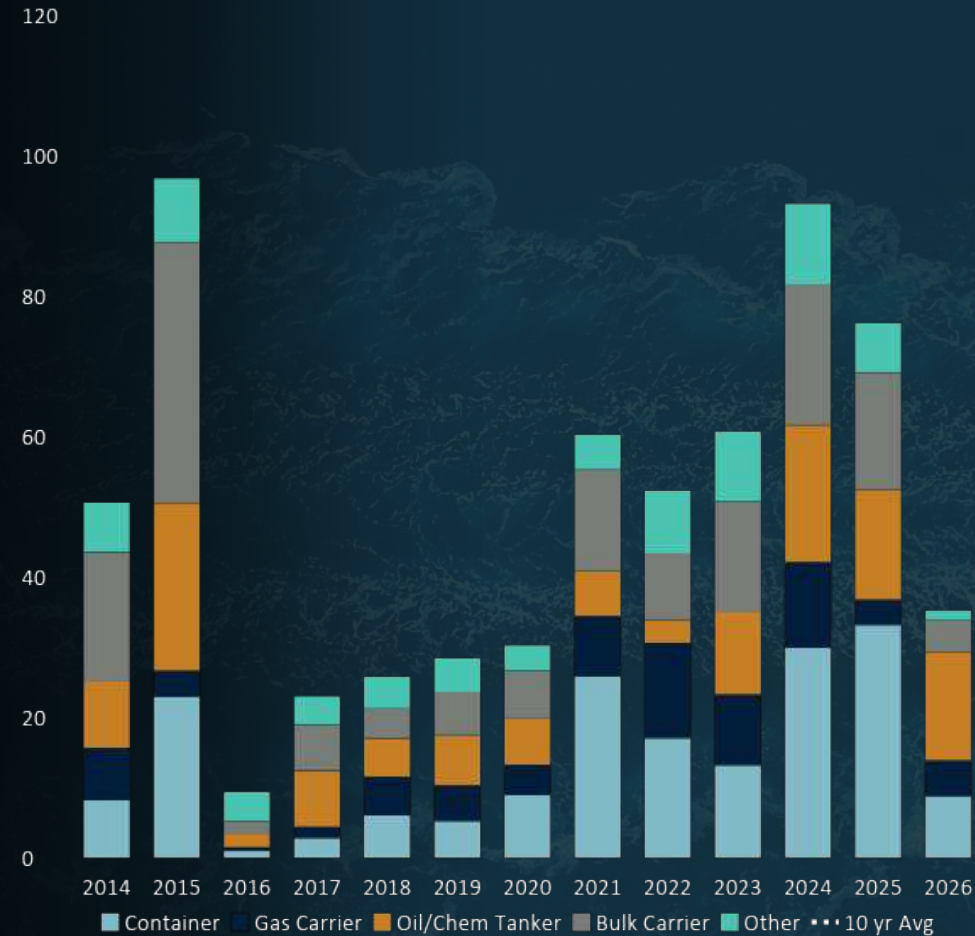
2

3

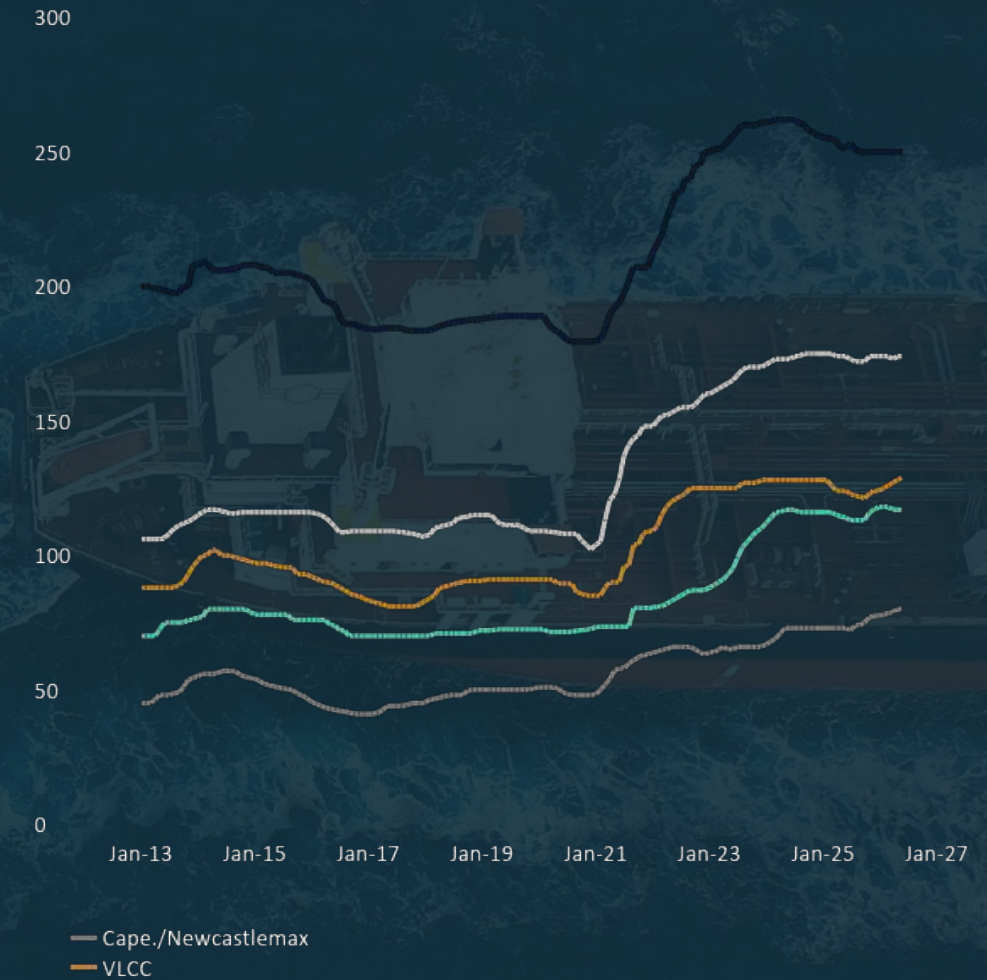


Newbuilding prices remain firm as tanker contracting succeeds the past year's container-led cycle

Contracting, Worldwide mill CGT by Year



Newbuilding Prices, USD millions



Supportive macro case (inflation up, USD down) driving investment interest amid capital deployment pressure

12-month Price Trend, Capesize/ Newcastlemax Bulker



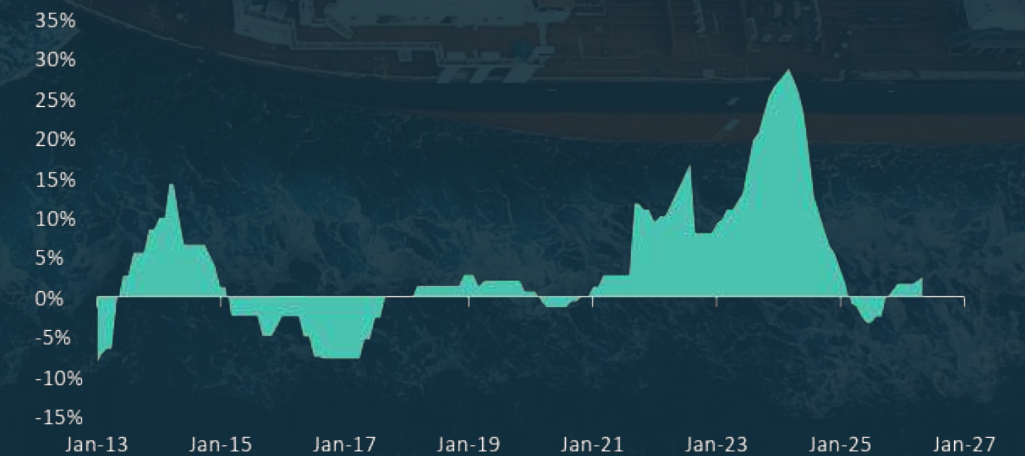
12-month Price Trend, VLCC



12-month Price Trend, LNGc 174k MEGI/XDF

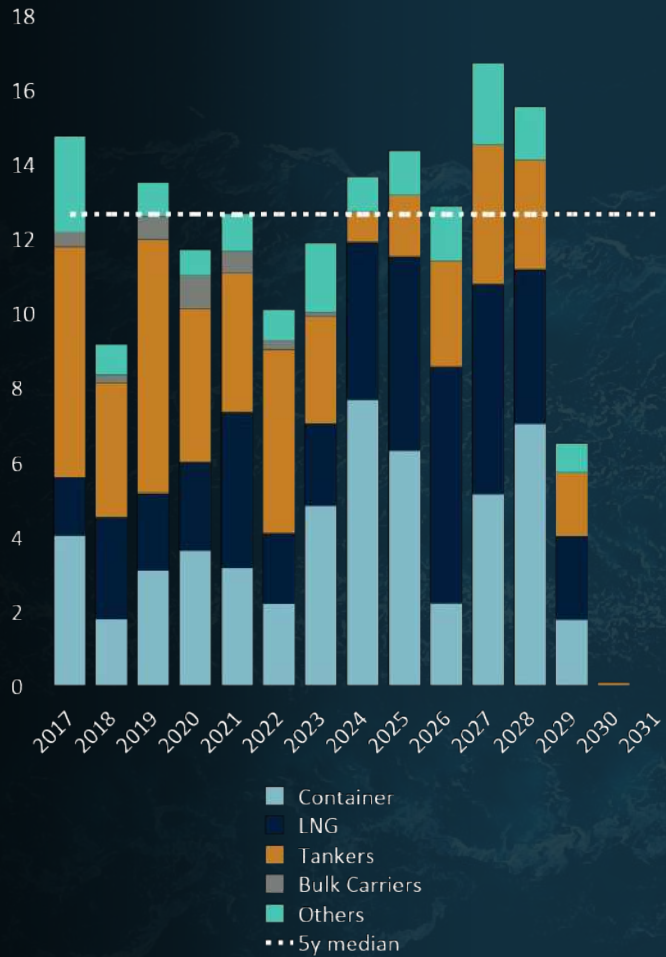


12-month Price Trend, VLGC

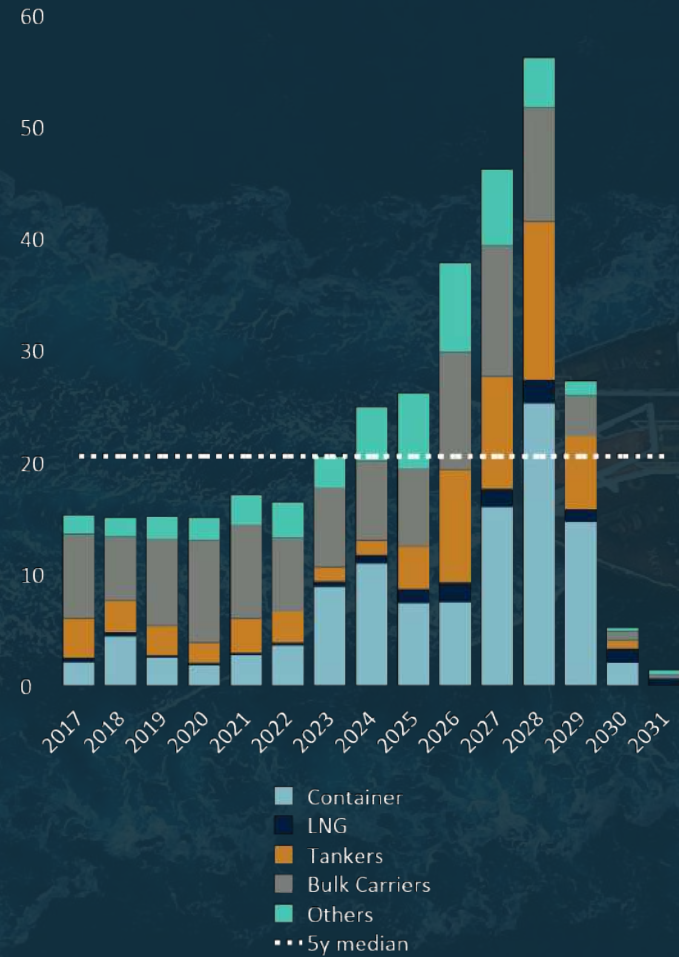


Rising Chinese dominance: 72% of 2028 yard orderbook vs. 52% in 2025

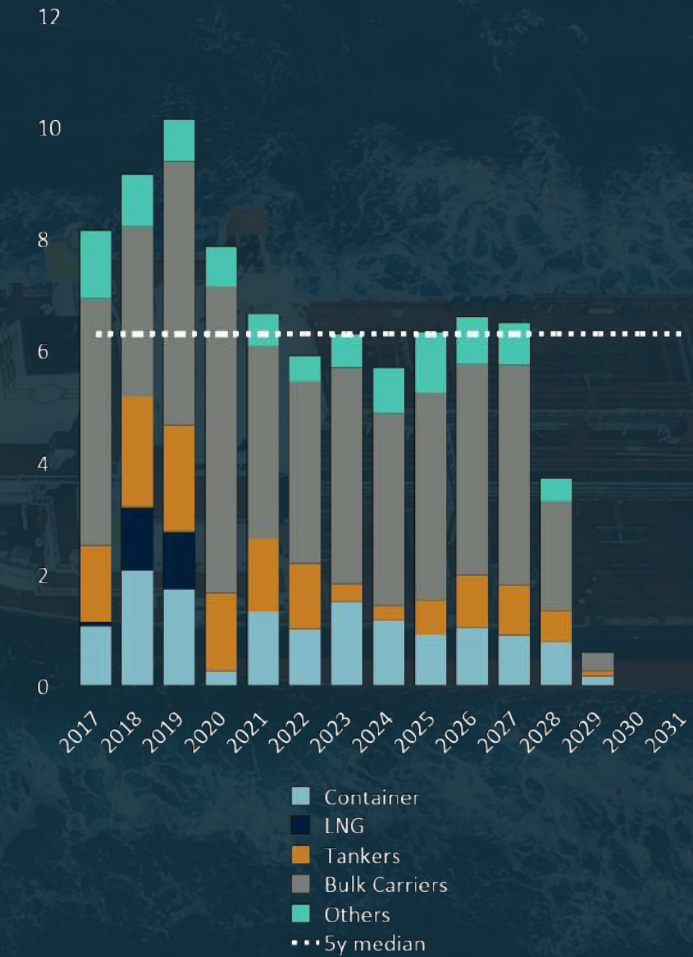
Deliveries & Orderbook, Korea mill CGT



Deliveries & Orderbook, China mill CGT

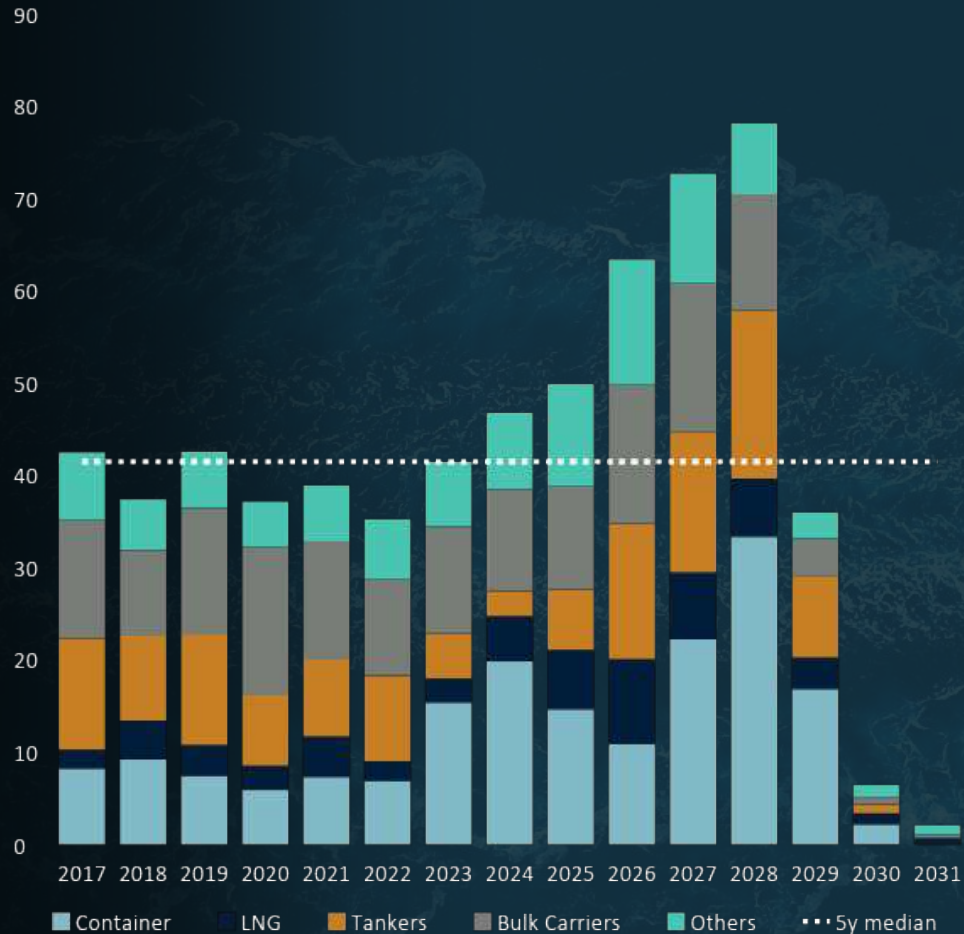


Deliveries & Orderbook, Japan mill CGT

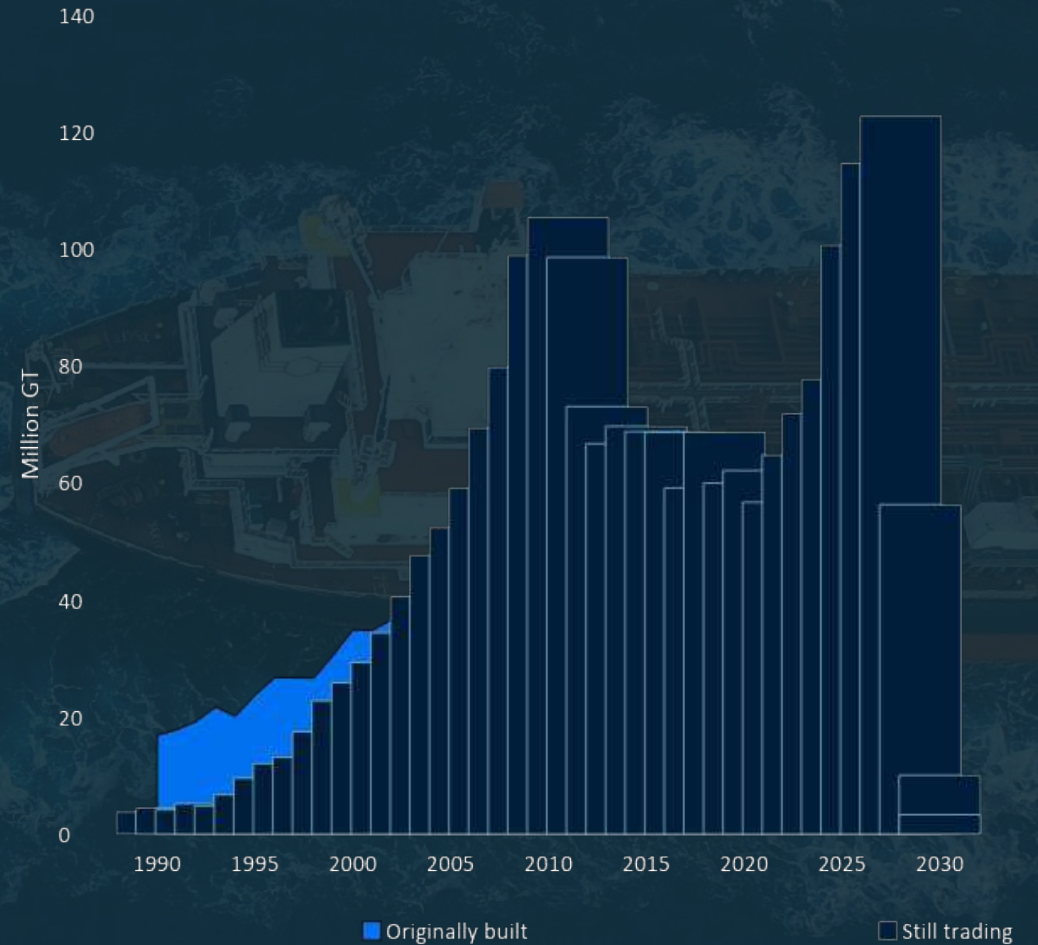


2028 orderbook expands 57% vs. 2025 but ageing fleet drives a wave of replacement demand into the 2030s

Deliveries & Orderbook, Worldwide mill CGT



Tsunami of Replacement Requirements as approach the 2030's

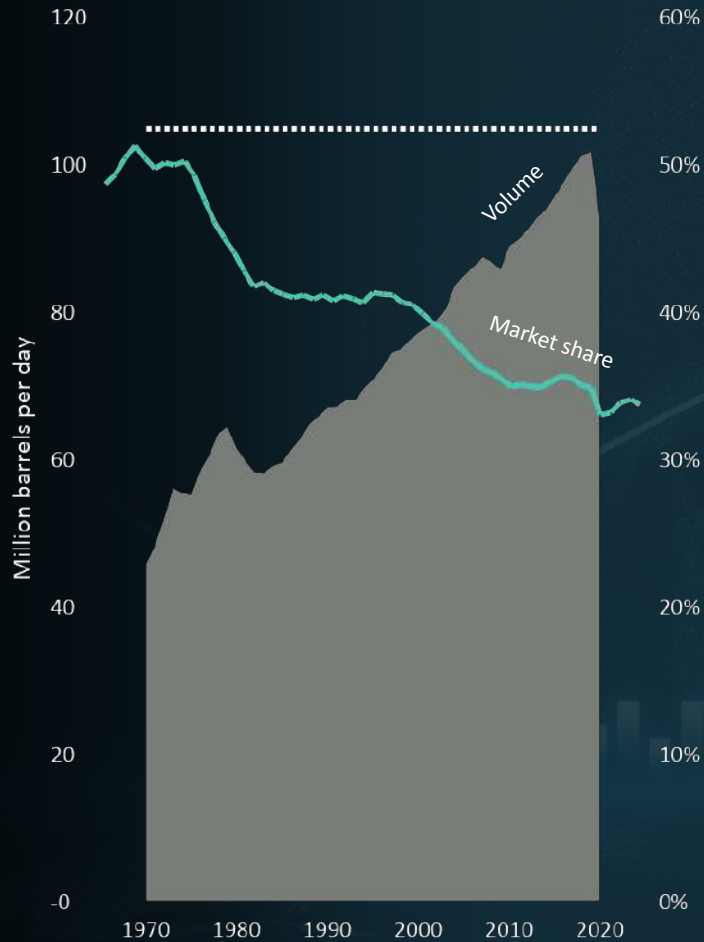


Lack of Parallel Thinking – The Energy Transition

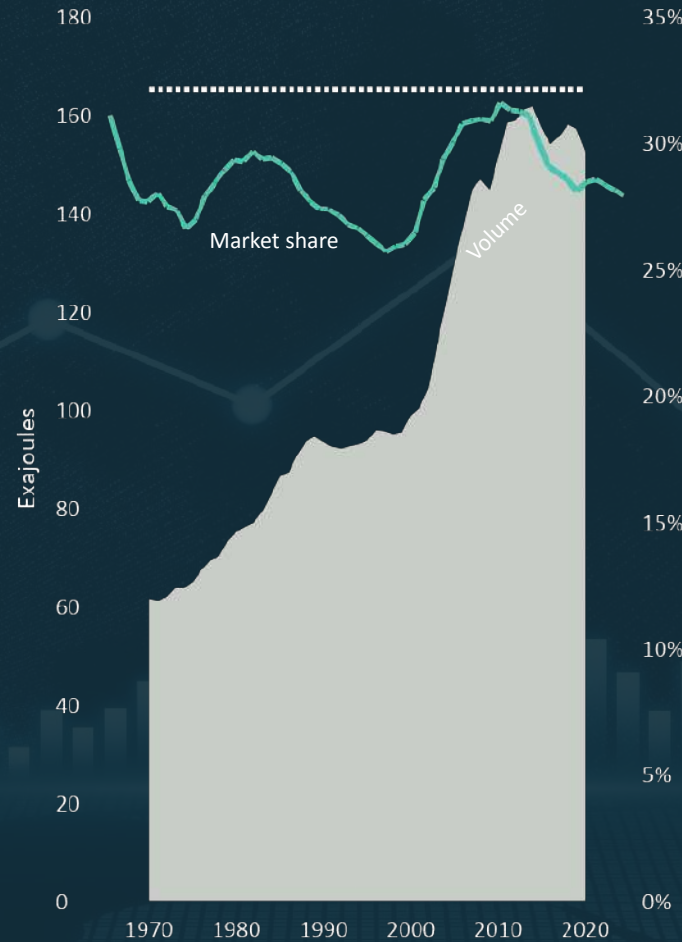


It's a Transition, not a switch? Wrong! Renewables still just an addition

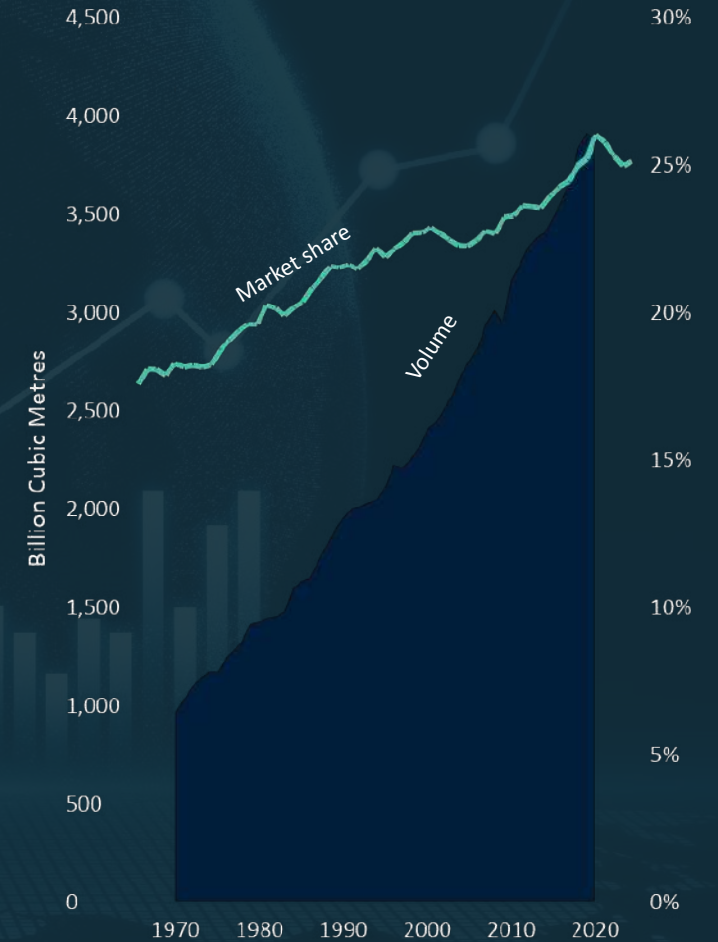
Oil demand, 1970-2025



Coal demand, 1970-2025

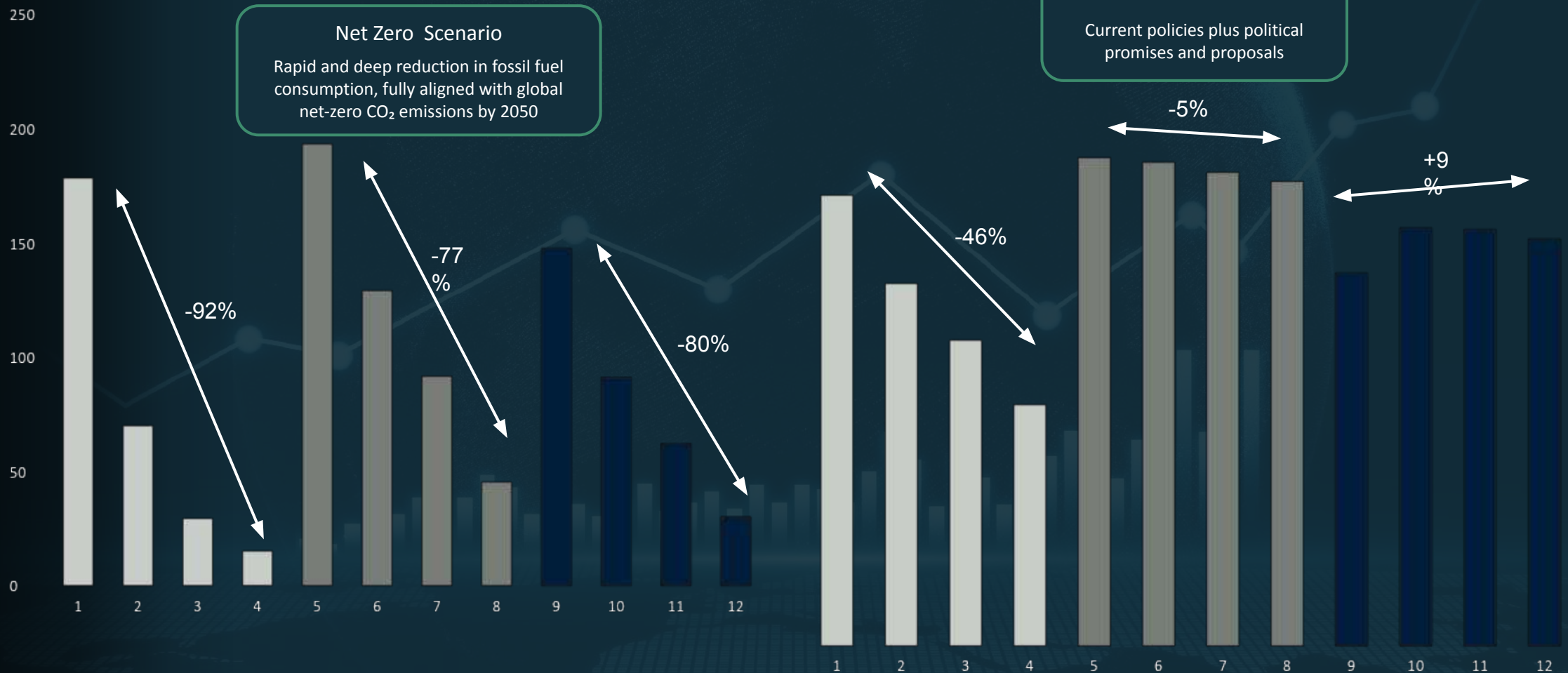


Natural Gas demand, 1970-2025

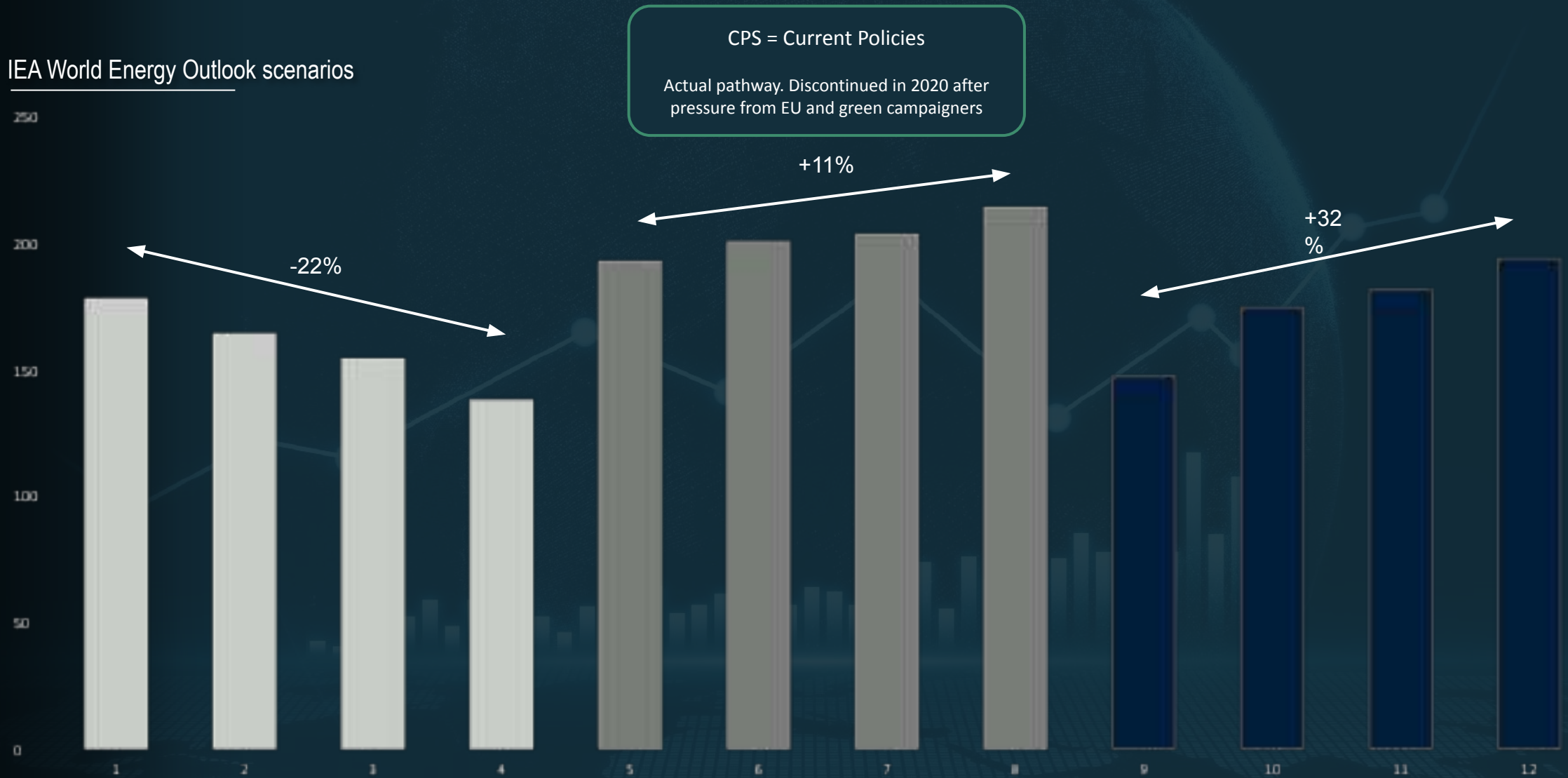


Previous IEA scenarios were ultra-bearish for the longer-term commodity shipping outlook....

IEA World Energy Outlook scenarios, Exajoules



However, the IEA's reinstated Current Policies scenario has brought back some realism



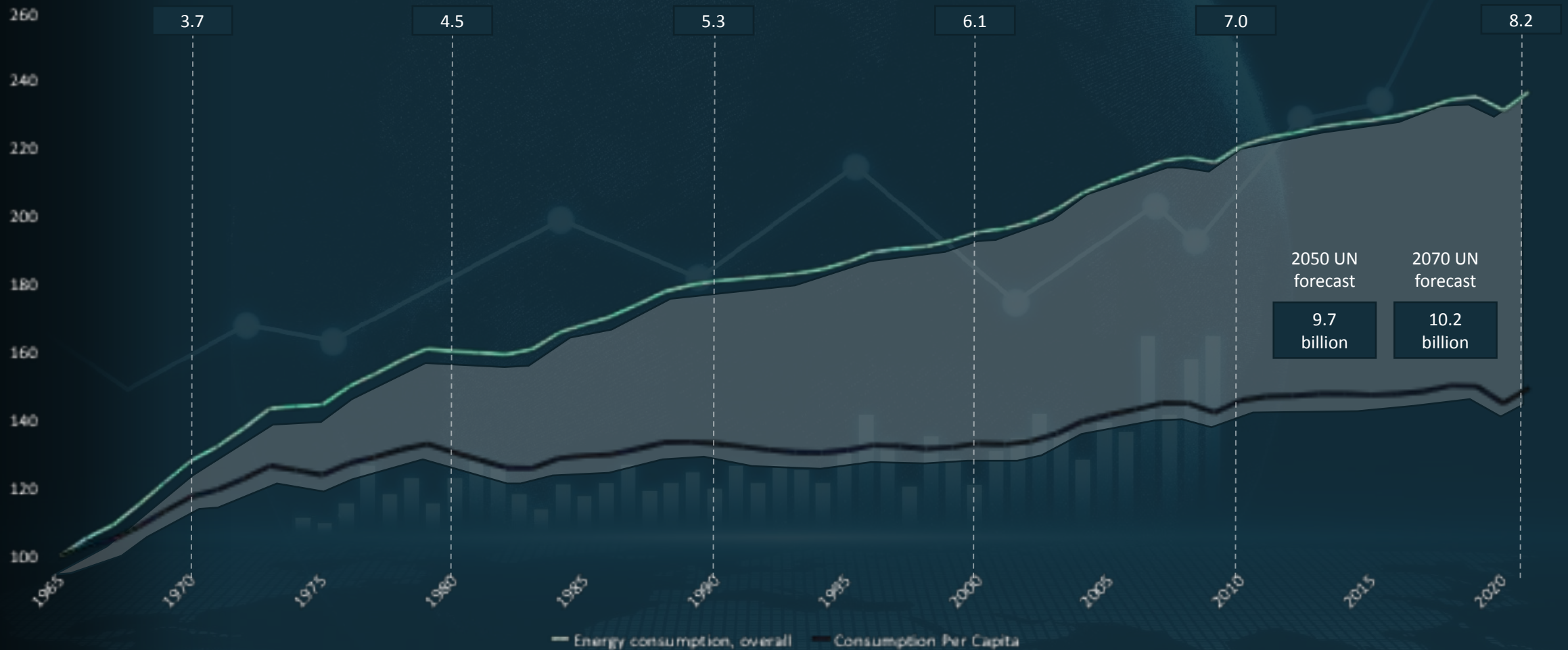
Market Perspectives

What's driving it?



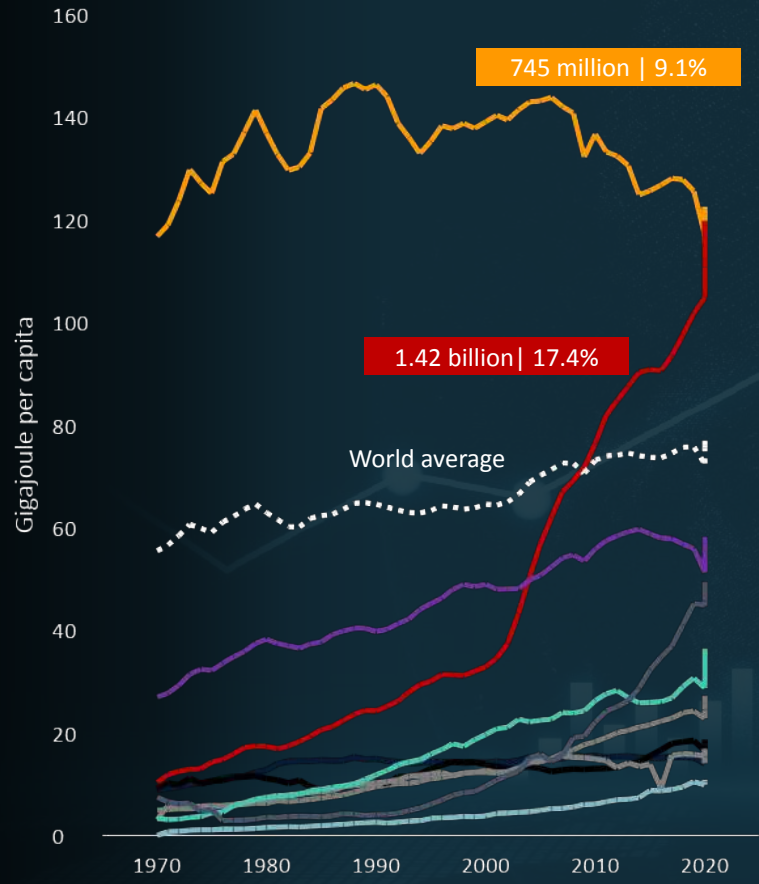
Population growth is a key driver – Another 2 billion consumers coming despite slowing fertility rates

Wealth vs Population growth effect...index 100 = 1965

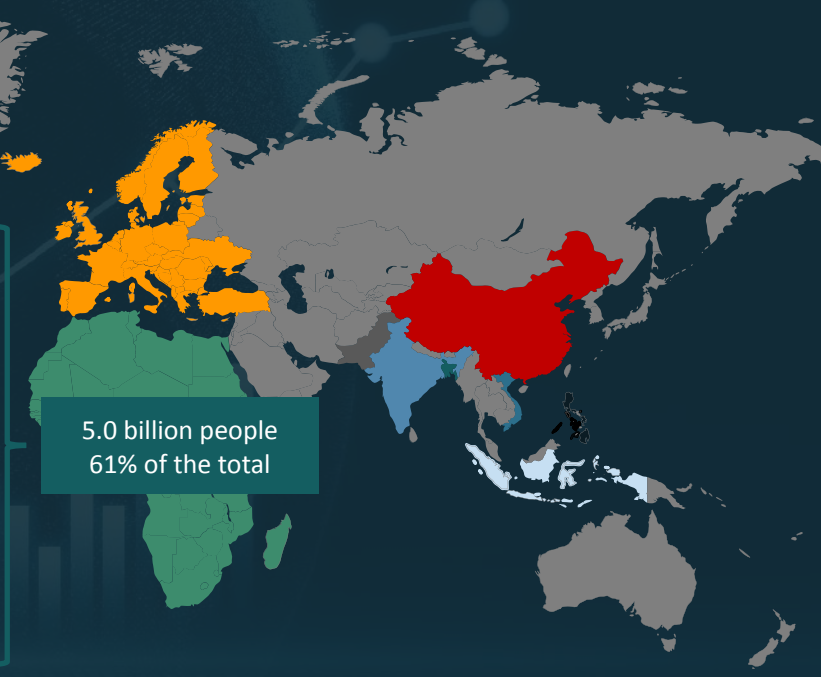
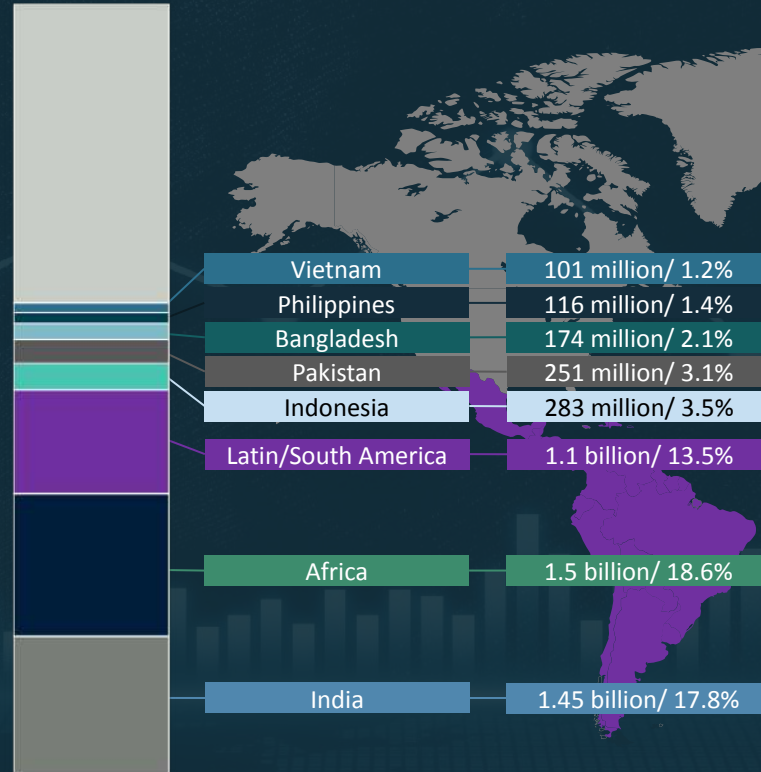


Wealth improvements – Majority have barely started their journey towards a modern society

Energy consumption per capita, 1970-2024

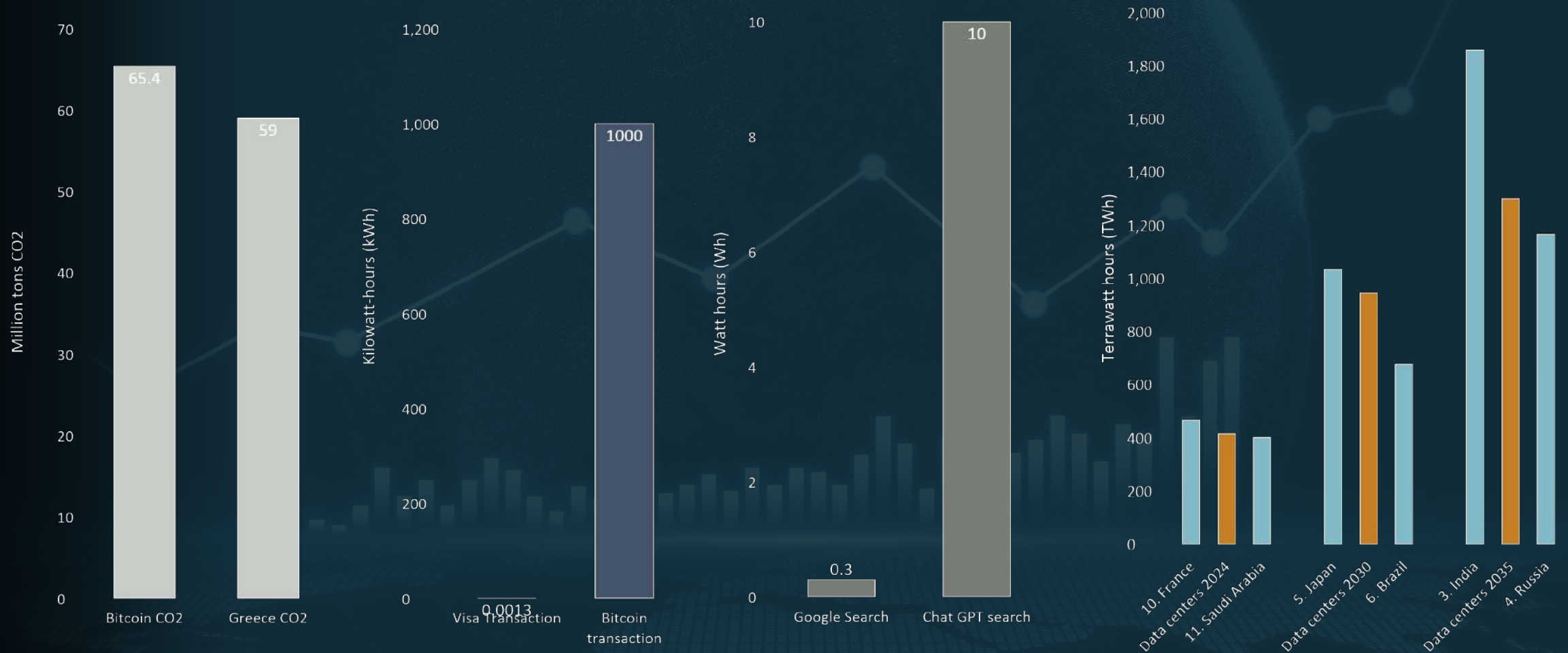


8.2 billion population



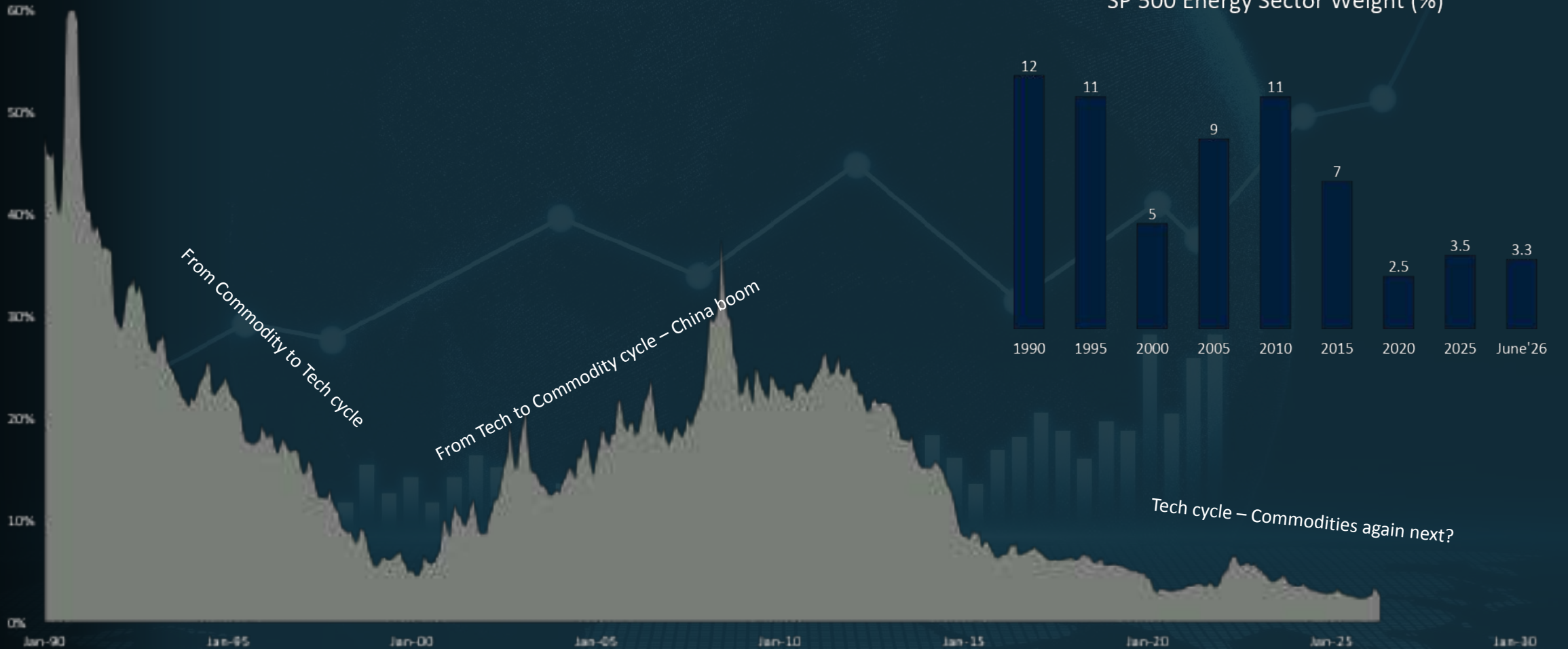
Developed economies? Tech driving significant power demand – Data center growth to be largely gas-powered

The energy demand that did not exist before....



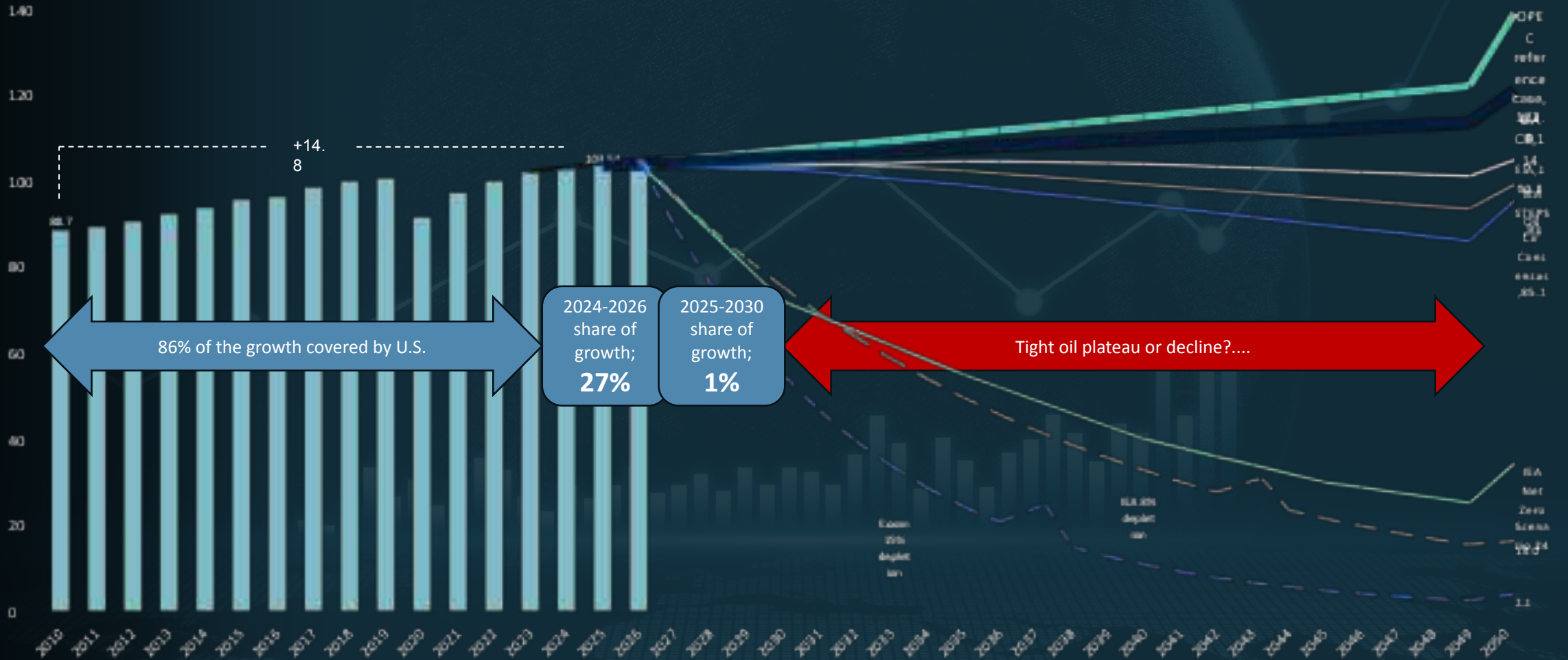
Most do not realise it yet – Wall street included – but an energy cycle is required

Commodity Index versus Nasdaq % ratio

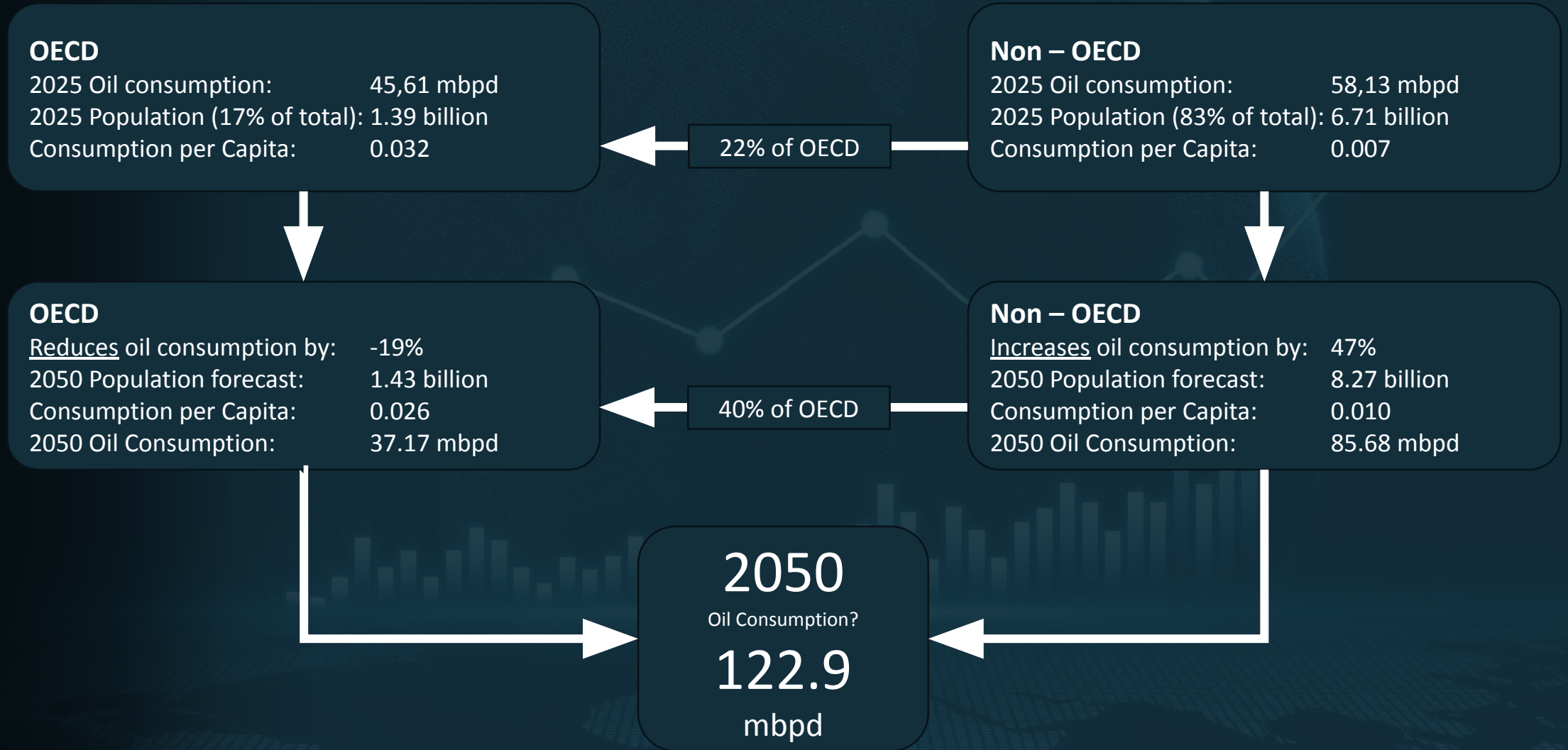


Oil example of the IEA's U-Turn, and what's implied from OPEC's 2050 forecast

Latest scenario and forecasts point to no peak until beyond 2050

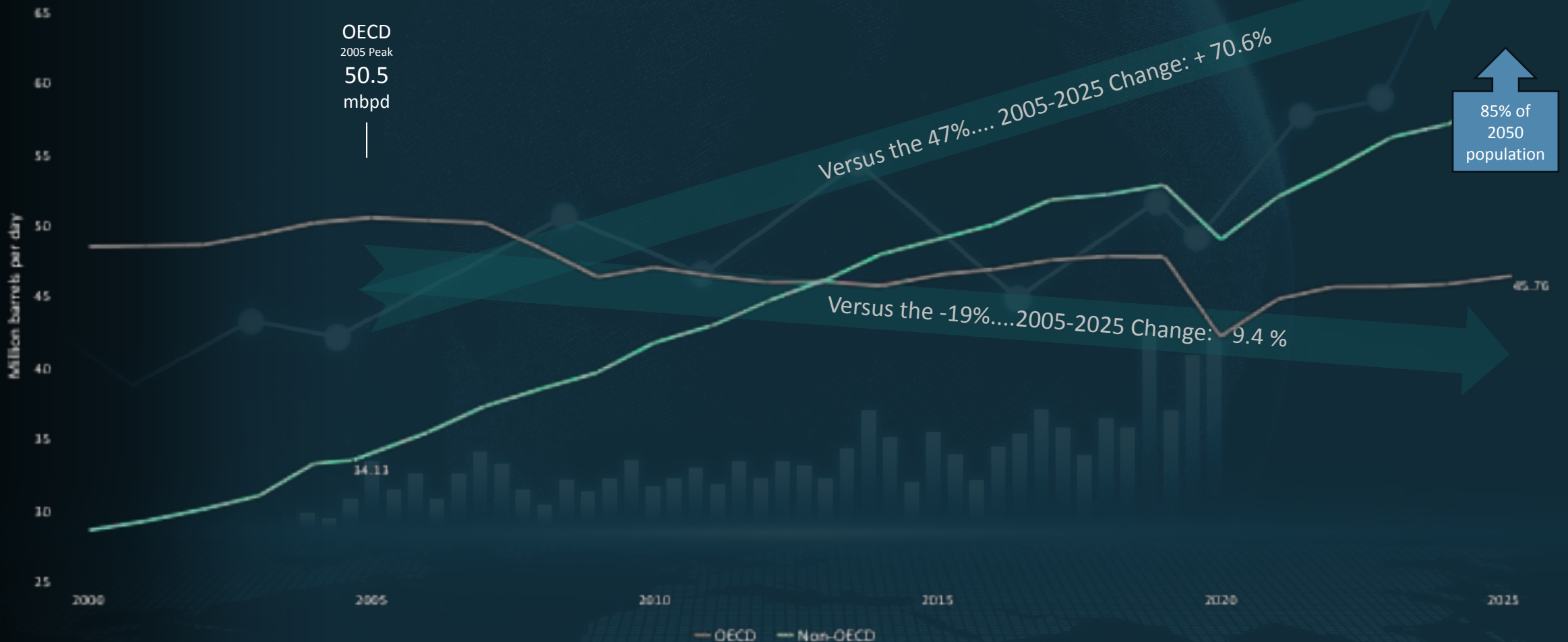


OPEC overly aggressive assumptions? We don't think so



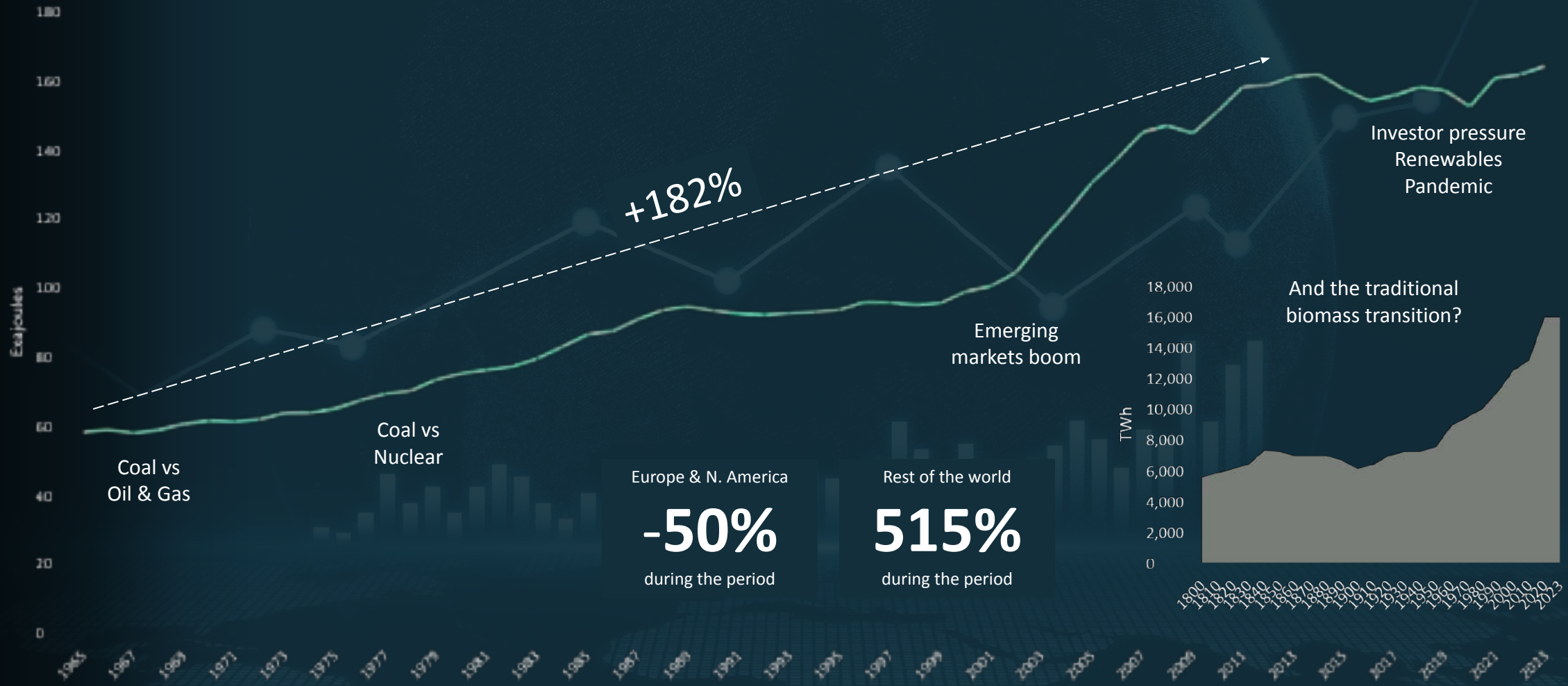
OPEC overly aggressive assumptions? We don't think so

Peak What?...Non-OECD is the driver with population growth, wealth improvements and industrial development upside, but without the infrastructure



We have “transitioned” before....driven by chase for efficiency gains and climate consciousness

How did the coal to oil & gas transition from the 1950's and onward go.....?”the West” succeeded, but account only for ~17% of the world population...



Astrup Fearnley | Group at a glance

Global reach - local presence

- Global group of companies owned by The Hans Rasmus Astrup Foundation, headquartered in Oslo
- Established in 1869
- With 17 offices around the world in 14 countries, Astrup Fearnley can draw on a wide array of international resources to provide our clients maritime and financial services across all time zones
- The Foundation also owns The Astrup Fearnley Collection and Museum, a world leading contemporary art center in Oslo

COUNTRIES

15

EMPLOYEES

435

NATIONALITIES

21

YEARS OF HISTORY

150+

HEADQUARTER

OSLO



Fishery & Aquaculture



Offshore Rig



Shipping



Investment Banking | Direct Investments



Renewable Energy & Cleantech



Offshore Supply



Asset Management

Disclaimer

Research

1. Introduction

The statistical and graphic information set forth in the analysis is compiled by Fearnresearch and based on the databases and time series supplied by Fearnresearch, the research division of Fearnleys AS, and other external sources of information. Fearnresearch compiles, processes and publishes data for the benefit of the brokering departments of Fearnleys AS and its clients. Its methodologies for collecting data, and therefore the data collected, may differ from those of other sources, and its data do not reflect all or even necessarily a comprehensive set of actual transactions occurring in the market. Certain estimates may be based on prevailing market conditions. There can be no assurance that such data reflect actual market conditions.

Data compilation, especially for earlier historical periods, is subject to limited audit and validation procedures. Both closed and open sources, interviews and market intelligence to gain information on different topics may be used. Accordingly, there can be no assurance as to the accuracy or completeness of the estimates, advice, statements and any other information contained in the analysis.

2. Risks

Research coverage of Fearnleys AS encompasses solely companies within the shipping sector. This sector is cyclical by nature and will over time presumably experience higher volatility than the overall market.

3. Confidentiality

Pursuant to Fearnleys' Code of Conduct, all employees of Fearnleys AS are subject to duty of confidentiality towards clients and with respect to handling inside information. All employees shall follow strict information handling procedures and other organizational procedures to minimize conflicts of interest within Fearnleys and between clients.

4. General Disclaimer of Liability

The analyses, estimates, advice, statement and any other information contained in the analysis are prepared and presented in good faith. However, neither Fearnresearch, Fearnleys AS nor any of their subsidiaries, associated companies, organisations, management personnel, employees, agents or independent contractors (collectively the "Fearnley Interests") shall under any circumstances be under any liability for any losses, damages or costs caused to any person, company or other legal entity arising or resulting directly or indirectly from reliance on any inaccurate, incorrect, incomplete or misleading analyses, estimate, advice, statement or any other information contained in the analysis resulting directly or indirectly from any negligent or gross negligent act(s) or omission (s), or wilful misconduct, committed by any of the Fearnley Interests.

In the event that a court or tribunal, notwithstanding the above liability exemptions, should hold any, some or all of the Fearnley Interests liable in damages for any inaccurate, incorrect, incomplete or misleading analyses, estimate, advice, statement or any other information, the liability shall not under any circumstances whatsoever exceed in total ten (10) times the fees payable for the analysis in question, or US\$ 100,000 (United States Dollar Hundred Thousand), whichever is the higher.

Under no circumstances whatsoever shall the individual or individuals who have caused the losses, damage or costs be held personally responsible or liable in any way. The Fearnley Interests shall under no circumstances whatsoever be liable for punitive damages.

The analysis is prepared to the benefit of the named addressee only. No other third party may rely on the analysis or any of its content without prior written approval of Fearnley Consultants AS.

Should any part of this clause be held unenforceable, non-operative or invalid by a court or tribunal, the remaining parts shall remain in full force.

5. Processing of Personal Data

The processing of personal data within Fearnleys AS is subject to strict rules and regulations. Our Privacy Policy describes the procedures for processing personal data according to the General Data Protection Regulation (GDPR). Please see our homepage for more information on this.

THE FUTURE OF SHIPBROKERS

PANEL DISCUSSION:

How Shipbrokers stay relevant and positioned as business relationships advance



FONASBA



ECASBA

Moderator



Bahadir Tonguc

Chair of FONASBA
Shipbroking Committee



Hans Nicolai Edbo

Norwegian Shipbrokers
Association



Dag Kilen

Head of Research and
Senior Advisor,
Fearnleys AS

Panellists



Lars Hallengren

Brax Shipping



Maggie Hui Li

ITIC



Fulvio Carlini

President of FONASBA



THE FUTURE OF SHIPBROKERS

PANEL DISCUSSION:

**How Shipbrokers stay relevant and positioned
as business relationships advance**



FONASBA



ECASBA



Maggie Hui Li

ITIC



REMOTE PILOTAGE

Pioneering Remote Pilotage with DanPilot



FONASBA



ECASBA

Moderator



Jesper Sebbelin

DSPO



Brian Schmidt Nielsen

DanPilot



ECASBA European Seminar

11 June 2026

Brian Schmidt Nielsen
Head of Projects / Licensed Pilot





DanPilot

- 1 – DANPILOT (INDEPENDANT PUBLIC COMPANY)
- 2 – OBLIGATED TO SUPPLY
- 3 – 21.000 PILOTAGE PR YEAR
- 4 – 9.000 IN TRANSIT AND 12.000 HARBOUR PILOTAGE
- 5 – 1.800.000 NM PILOTED LAST YEAR
- 6 – 240 PILOTS
- 7 – 510 EMPLOYEES
- 8 – TURNOVER 76 MILLION EUR
- 9 – HQ IN SVENDBORG





DanPilot NCC
NAVIGATIONAL CONTROL CENTER

Presentation overview:

01

Remote pilotage / pilotage provider

02

Technical setup

03

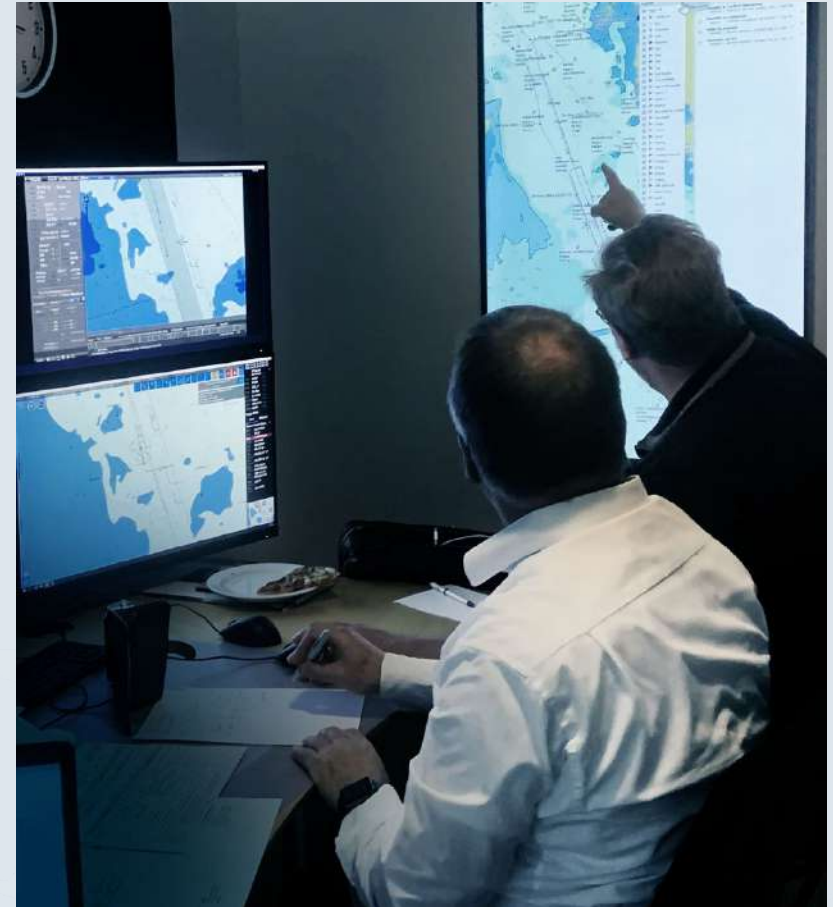
Areas – test and futher

04

Who are the customers

05

Road ahead



Remote pilotage is a strategic complement that enhances DanPilot's relevance, optimises capacity utilisation, and strengthens its competitiveness.

Strategic rationale

Remote pilotage addresses a number of structural challenges in the current pilotage business and enables DanPilot to:

- Increase flexibility and predictability in service delivery to customers
- Utilise pilot capacity more efficiently across geography and weather conditions
- Establish a scalable offering capable of meeting increasing efficiency demands in the market
- Remain the preferred and socially responsible provider of pilotage services, also in a more digital future

For DanPilot, remote pilotage is not about replacing conventional pilotage, but about complementing the core business with a controlled, safe, and market-driven digital solution.



Solution Infrastructure

Onboard Equipment



DanPilot - Nautic Control Center Randers



Our streamlined plug-and-play solution seamlessly connects DanPilot to vessels, ensuring efficient navigation data transmission to Randers in order to support crews navigating Danish waters.

Requirements:

- Position, course, and speed (ECDIS)
- Radar images
- VDR data
- Ship-to-shore communication
- 2 MBit bandwidth

Simple setup with very few moving parts:

- Radar and ships ECDIS is screendumps < 15 seconds old
- Dynamic data (conning display) < 3 seconds old
- Trustbuilding and situational awareness enhancing communications platform
- Pilots PPU and Gatehouse AIS overview as data backup
- VHF and mobile as redundant Communications

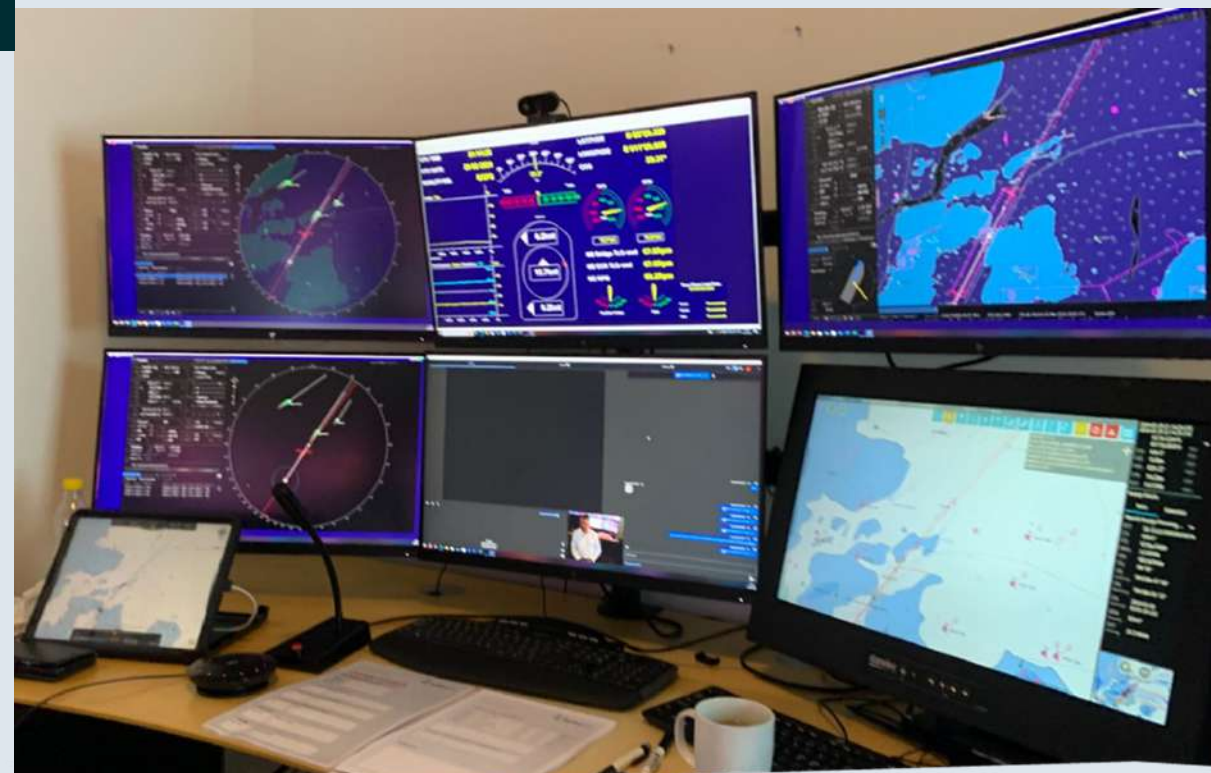
This system is designed for the transit segment. More than 150 remote pilotage tests has been preformed. The system provides a robust foundation for future development in approach and harbour pilotage.



DanPilot NCC
NAVIGATIONAL CONTROL CENTER

DNV:

Overall, DNV considers DanPilot's approach to identifying and mitigating relevant risks prior to remote pilotage to align with BEK401 requirements, through structured pre-checks, crew competence verification, and an assessment of operational conditions. The trials confirmed that identified safeguards provided a solid foundation for safe operations within the limitations of the trials, with users expressing confidence in the process and its outcomes.



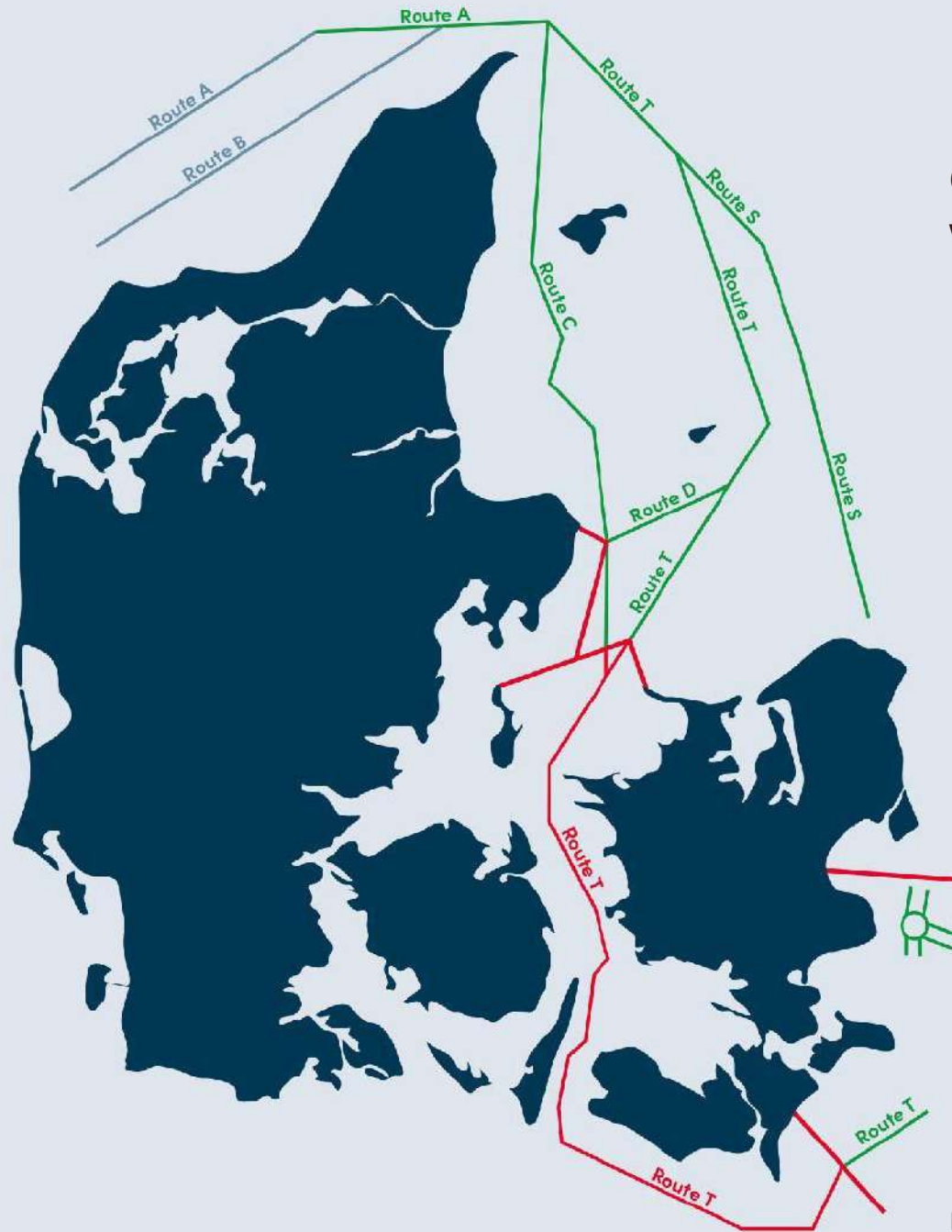
Crew Training and assessment



DanPilotNCC
NAVIGATIONAL CONTROL CENTER

| NCC Applicable Ship | | |
|---------------------|------------|---|
| Red | | Vessel cannot use NCC service |
| ↓ | Training | |
| Yellow | | Vessel's crew has completed training, and is ready for NCC when applicable officers has been assessed |
| ↓ | Assessment | Approval/passed - for relevant officer category. If candidate(s) do not pass, extended training and assessment will be recommended, alternatively simulator training. |
| Green | | Vessel ready for NCC |

- Assessment topics:
 - Language – Communication – Technical - BRM



Overview of most of the main transit routes through Danish waters.

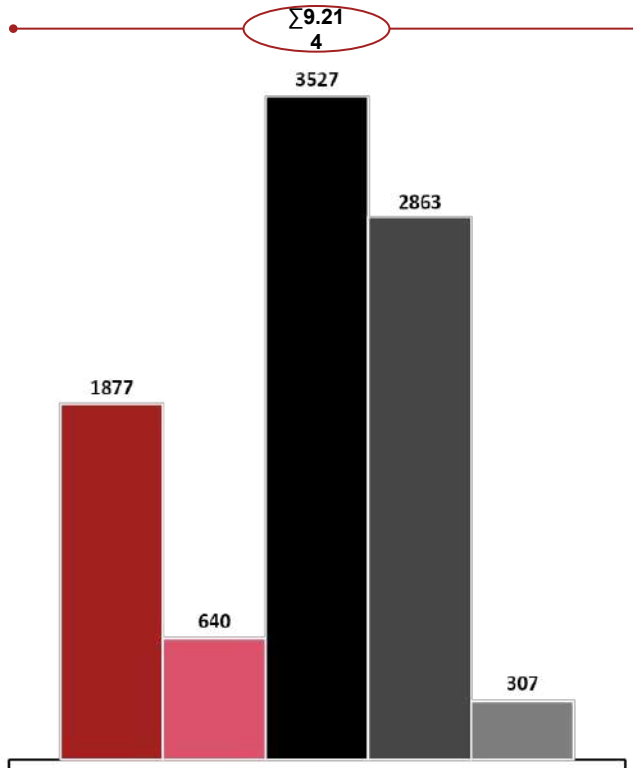
- Traditional pilotage covers all the routes marked here and off course the Sound and Lillebælt.
- Remote Pilotage tests has covered the green routes in the Kattegat and the Baltic West reducing pilot operations from 5 to 3 and there by among other benefits contributes to a substantial fuel saving.
- The future could see remote pilotage operations over the whole route network through Danish waters i.e. upon completion of the tunnel system between Denmark and Germany the routes from Fehmarn Belt to Great Belt South will be a natural next step



DanPilot's transit pilotage market comprised more than 9,000 pilotage operations in 2025 and is segmented into four main categories, each with varying pilotage frequencies.

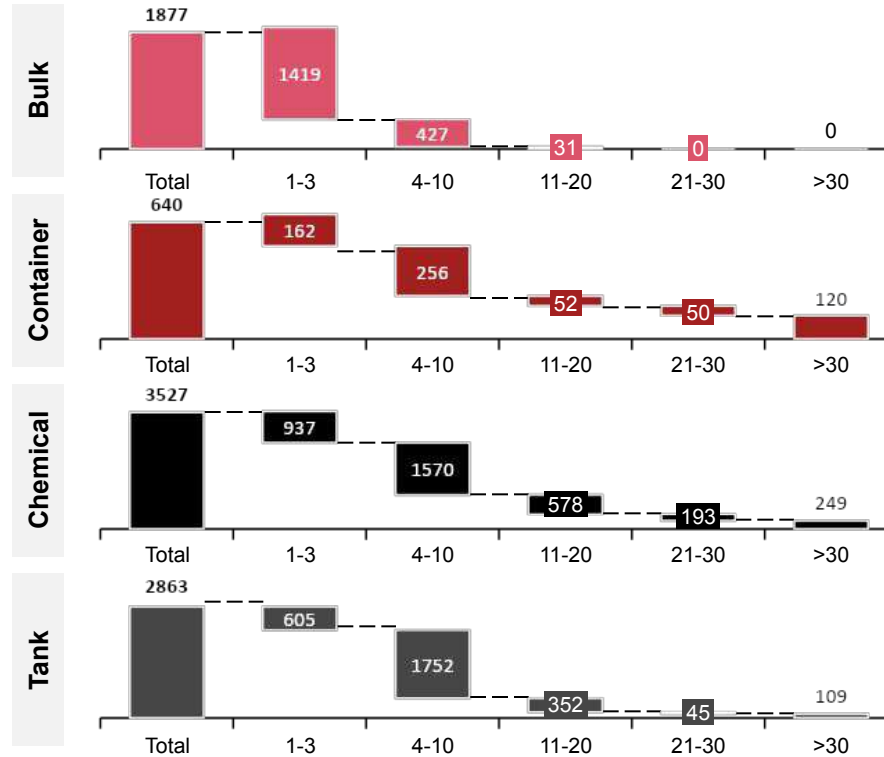
Overall distribution of transit Pilotage operations in 2025

■ Bulk ■ Chemical ■ Various
■ Container ■ Tank



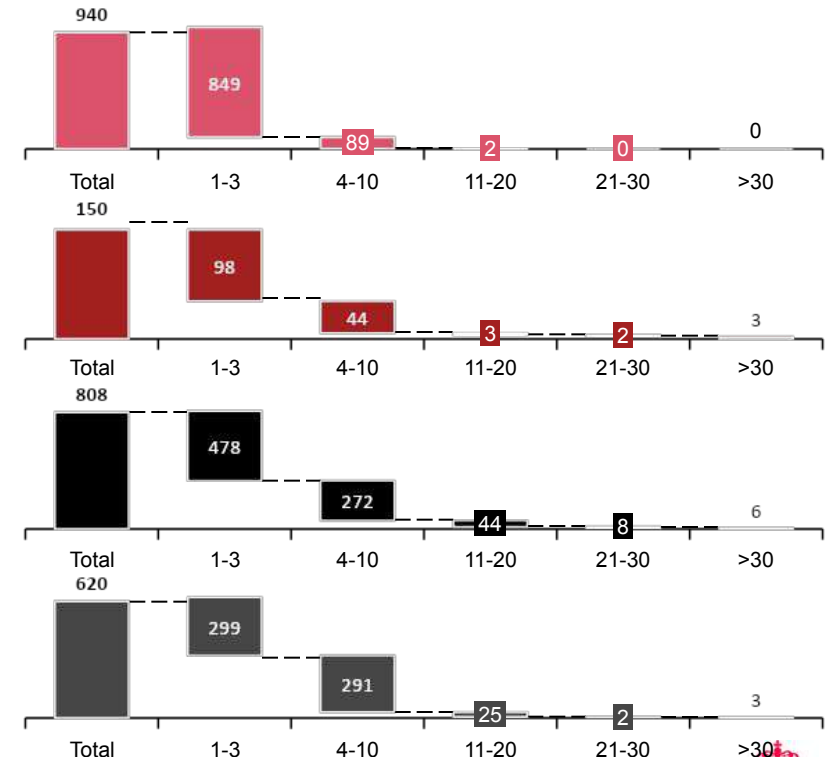
Total number of pilotage operations by pilotage frequency

Highlights where pilotage volume is concentrated and identifies the key segments driving activity and ROI potential for remote pilotage



Total number of unique vessels by pilotage frequency

Shows fleet distributions by pilotage frequency and highlights the share above/below the remote pilotage threshold (4 annual pilotages).

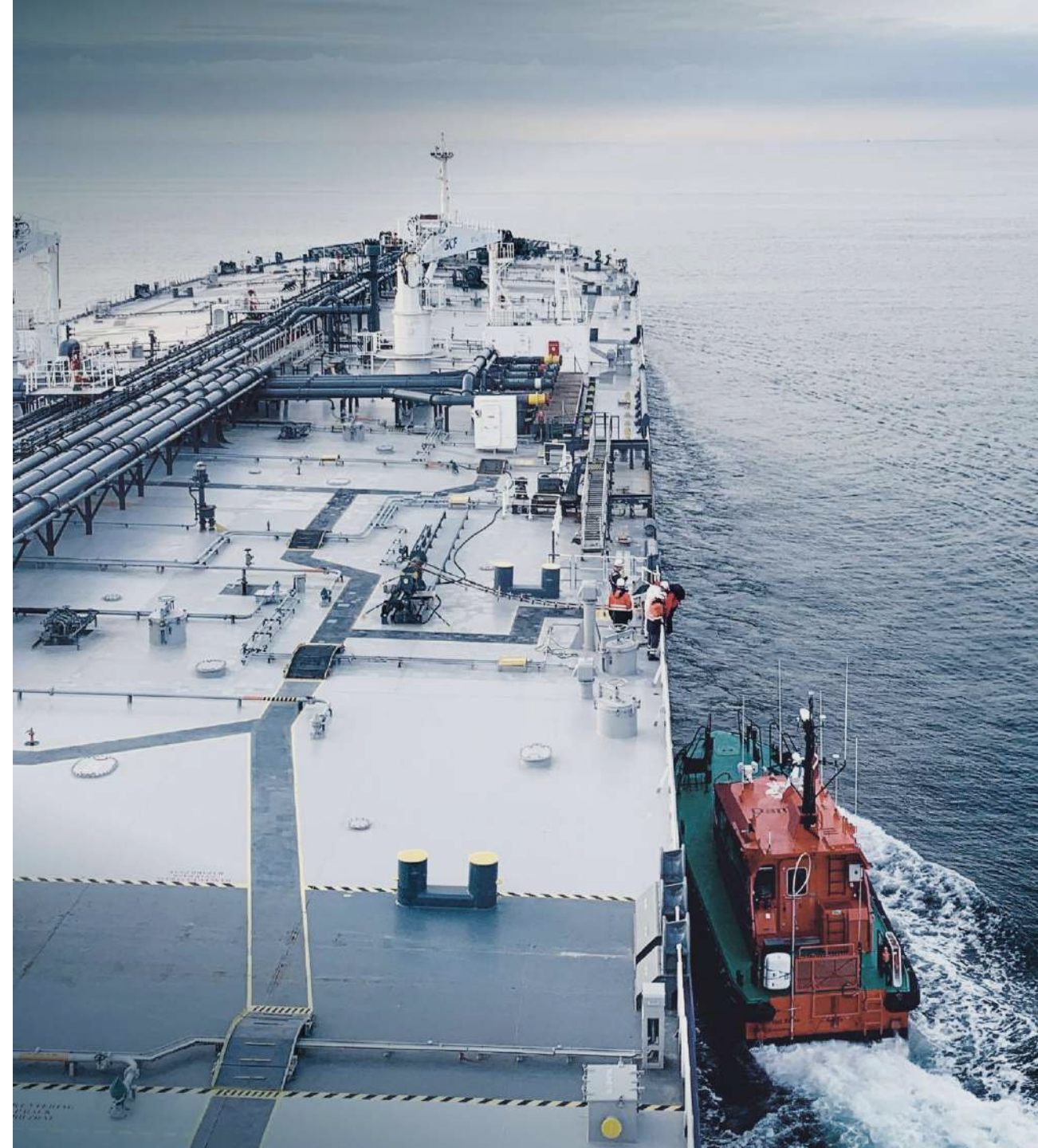


Road ahead



DanPilot and Danelec system is solid and has proven it's working

- **Evaluation is presently at the authorities:** We are awaiting feedback from the authorities on the evaluations on the test phase
- **Legislation allowing remote pilotage as a concept:** It is uncertain when the legislation can be expected. DanPilot is pushing so that we can supply our core business with a safe digital system that allows remote pilotage.
- **Talking to customers outside the test partners:** We are currently exploring the market and talking to customers with a pilotage frequency that supports the installation costs.



ECASBA European Seminar

Thank you very much

Brian Schmidt Nielsen
Head of Projects / Licensed Pilot



ECASBA SEMINAR 2026



FONASBA



ECASBA



Coffe break



EMSW UPDATE



FONASBA



ECASBA

PANEL DISCUSSION:

The benefits and challenges with EMSWe/MSW. Nemo, the Finnish way.

Moderator



Raymond Troch
FONASBA VP Europe
ECASBA Chair

Panellists



Jacek Tyminski
Polish Shipbrokers
Association and
ECASBA Vice-Chair



Miikka Kälvinmäki
Head of Business
Design, Fintraffic VTS



Fredrik Pettersson
Nautic Shipping



EMSW UPDATE

PANEL DISCUSSION:

**The benefits and challenges with EMSWe/MSW.
Nemo, the Finnish way.**



FONASBA



ECASBA



Jacek Tyminski

Polish Shipbrokers Association and ECASBA Vice-Chair



The Implementation of EMSWe Directive

Survey Objectives

- Assess implementation progress across Member States.
- Identify key challenges and operational implications.
- Gather industry feedback and perspectives.
- Support discussions with EMSA and DG MOVE.

Survey Date:
May 2026


Participating ECASBA
members:
11

The Implementation of EMSWe Directive

EMSWe Implementation Progress



Legend:

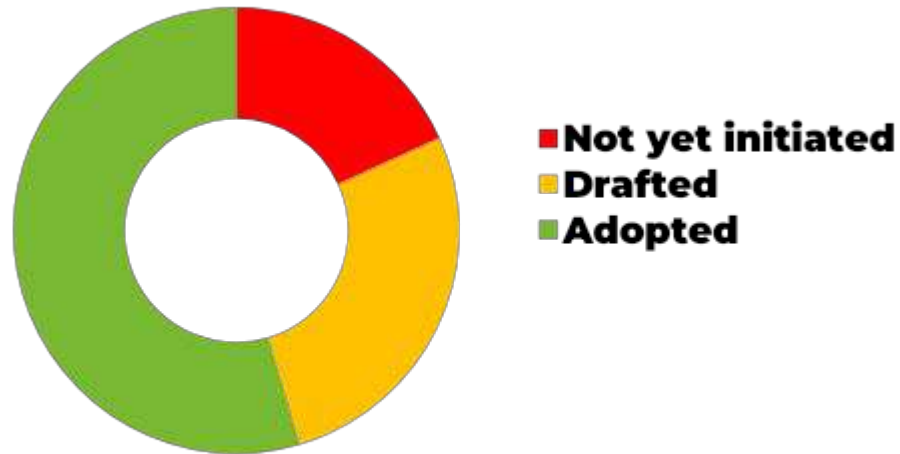
-  Fully implemented
-  Ongoing implementation
-  Early stage / planning
-  Not started

According to respondents:

- Implementation progress remains uneven across Member States.
- Delays and integration challenges are common across Europe.
- Interoperability between NMSWs, PCSs and Port Authorities remains a key obstacle.
- Government implementation efforts are advancing, although progress varies significantly across Member States.

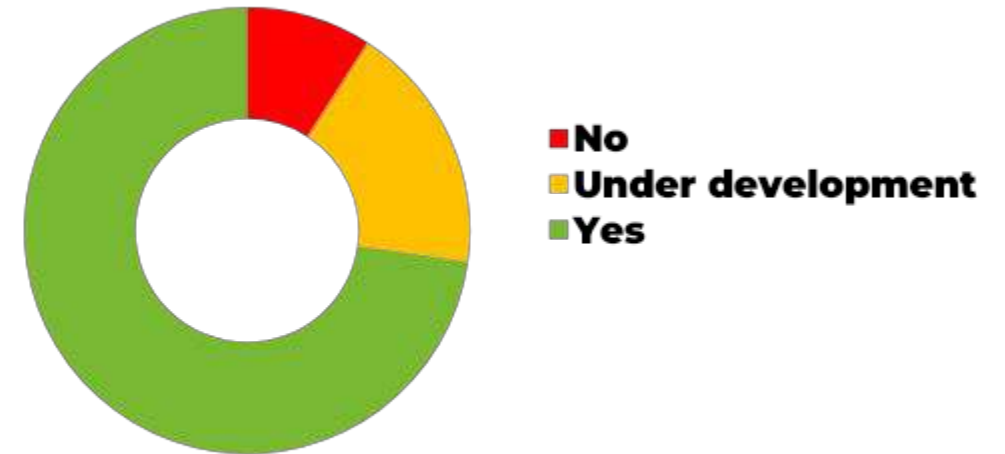
The Implementation of EMSWe Directive

Legislative Readiness



Legislative readiness is progressing, with national legislation already adopted in more than half of responding countries.

NMSW Operational Status



According to respondents:

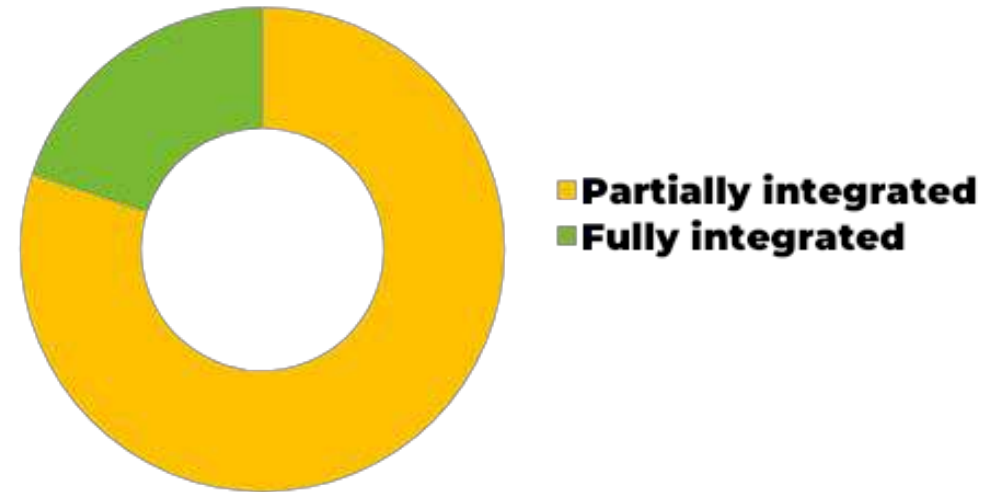
- NMSWs exist in most countries; however EMSWe compliance is not always achieved.
- Main challenges: interoperability, stakeholder coordination and integration of legacy systems.

The Implementation of EMSWe Directive

Public-Private Sector Interaction

- Most respondents report good cooperation between public and private stakeholders.
- PCSs are emerging as key facilitators of implementation.
- Public-private collaboration is supporting the transition.
- Simplicity and interoperability remain essential expectations.

Private Stakeholders Integration



- Stakeholder involvement is widespread but mostly partial.

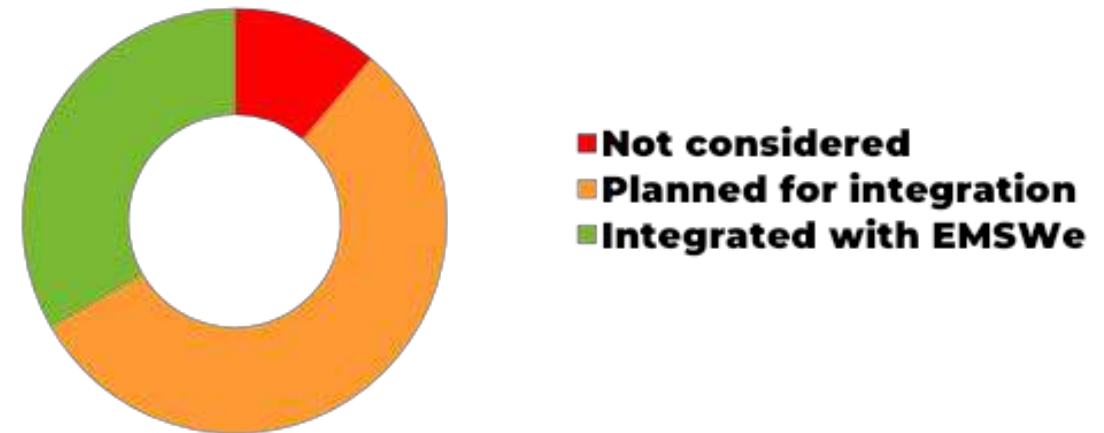
The Implementation of EMSWe Directive

Port Community Systems (PCS) & Port Authorities (PA)

Role of PCS and Port Authorities regarding EMSWe

Respondents highlighted the growing importance of PCS and Port Authorities as integration hubs within the EMSWe ecosystem, despite differing national implementation models.

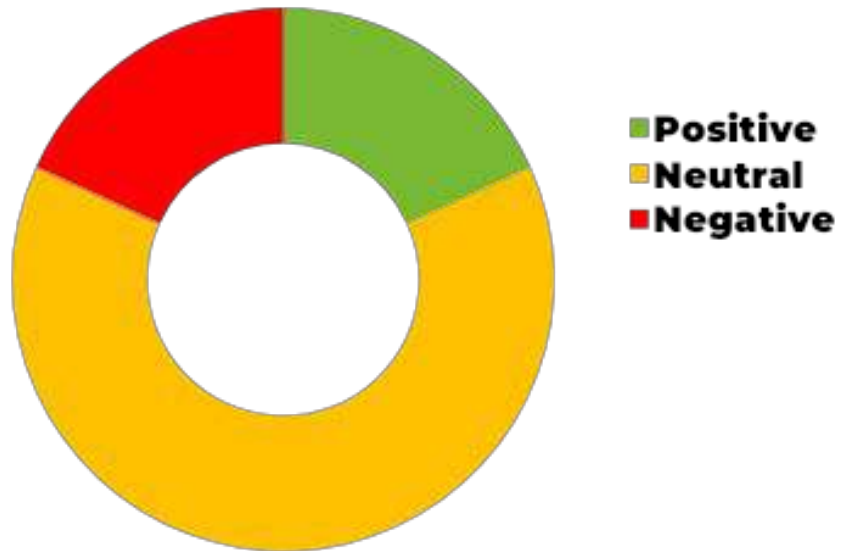
PCS Integration



- Most Member States plan to integrate PCSs with EMSWe.
- The remaining challenge is defining governance, responsibilities and interaction with NMSWs.

The Implementation of EMSWe Directive

Practical Impact on Shipping Agents



- Most respondents expect a neutral impact, reflecting uncertainty about whether EMSWe will deliver meaningful operational simplification.
- The perceived benefits of EMSWe depend on achieving data harmonisation, eliminating duplicate reporting and ensuring full integration across authorities.

The Implementation of EMSWe Directive

Main Challenges Identified by Respondents

- EMSWe implementation is constrained by a combination of technical, organisational and financial challenges.
- Interoperability, customs integration, governance and implementation costs emerge as the most common obstacles across Member States.

Key Issues Raised by Members for the EU and DG MOVE

- Greater harmonisation and standardisation across Member States.
- DG MOVE - DG TAXUD coordination.
- Simplification of reporting requirements / less data collection.
- Protection of the “report once” principle.
- Realistic implementation timelines and transition arrangements.

The Implementation of EMSWe Directive

Overall Conclusions

- EMSWe implementation remains uneven across Member States.
- Interoperability remains the main challenge to full implementation.
- Stakeholders expect harmonised and truly “report once” processes.
- Customs integration is a critical success factor.

Successful implementation will depend on harmonisation, interoperability and operational simplification across Europe.

European Maritime Single Window environment (EMSWe)



- The European Commission has adopted a multi-annual implementation plan (MIP).
- In this context, in Q4 of 2025, the Commission surveyed the Member States to assess how they intend to implement their Maritime National Single Windows in accordance with the EMSWe



https://transport.ec.europa.eu/transport-modes/maritime/eu-wide-digital-maritime-system-and-services/european-maritime-single-window-environment_en



European Maritime Single Window environment (EMSWe)

| Member State - EEA State | National Coordinating Authority | National Coordinators functional mailbox | Testing with declarants opens | MNSW go live date |
|--------------------------|---|--|-------------------------------|-----------------------|
| Belgium | Federal Public Service Mobility and Transport, DG Shipping | emswe@mobiliteit.fgov.be | | Q4 2027 (tentative) |
| Bulgaria | Bulgarian Ports Infrastructure Company | office@bgports.bg | | Q1 2027 (tentative) |
| Croatia | Maritime Safety Directorate | emswe@pomorstvo.hr | | Q1 2027 (tentative) |
| Cyprus | Cyprus Ports Authority | emswe@cpa.gov.cy | | Q2 2026 (tentative) |
| Denmark | Danish Ministry for Resilience and Preparedness | aju@mssb.dk | | Q4 2027 (tentative) |
| Estonia | Estonian Transport Administration | emswe@transpordiamet.ee | | Q2 2027 (tentative) |
| Finland | Finnish Transport and Communications Agency (Traficom) | emsw-FI@traficom.fi | already open | Q1 2027 |
| France | Directorate General for Maritime Affairs, Fisheries and Aquaculture | gump@mer.gouv.fr | | Q2 2026 (tentative) |
| Germany | GeneralDirektion Wasserstrassen und Schifffahrt (GDWS) | NCA-DE-NSW-SSN.GDWS@wsv.bund.de | | 2028 (tentative) |
| Greece | Safety of Navigation Directorate | dan@hcg.gr | | 2028 (tentative) |
| Iceland | The Icelandic Transport Authority (ICETRA) | emswe_is@samgongustofa.is | | Q1 2027 (tentative) |
| Ireland | Department of Transport, Marine Survey Office | mso@transport.gov.ie | | Q4 2027 (tentative) |
| Italy | Italian Coast Guard Headquarters | emswe@mit.gov.it | Q2 2026 | Q2 2026 (tentative) |
| Latvia | Ministry of Transport | LV_msw@sam.gov.lv | | Q4 2027 (tentative) |
| Lithuania | Lithuanian Transport Safety Administration | emswe@ltsa.lt | | Q4 2027 (tentative) |
| Malta | Authority for Transport in Malta | emsw.tm@transport.gov.mt | | Q4 2026 (tentative) |
| Netherlands | Ministry of Infrastructure and Water Management | EMSWe@minienw.nl | | Q4 2027 (tentative) |
| Norway | Norwegian Coastal Administration | post@kystverket.no | already open | Q1 2026 - Operational |
| Poland | Ministry of Infrastructure, Department of Maritime Economy | helpdesk@nsw.gov.pl | | Q4 2026 (tentative) |
| Portugal | Directorate-General for Natural Resources, Safety and Maritime Services | suporte.ssn@dgrm.mm.gov.pt | | Q1 2027 (tentative) |
| Romania | Romanian Naval Authority | emswe@rna.ro | | Q4 2026 (tentative) |
| Slovenia | Ministry of Infrastructure - Slovenian Maritime Administration | ursp.box@gov.si | Q4 2026 | Q1 2027 (tentative) |
| Spain | Puertos del Estado | emsweES@puertos.es | | Q1 2027 (tentative) |
| Sweden | Swedish Maritime Administration | EMSWe@sjofartsverket.se | | Q3 2027 (tentative) |

European Maritime Single Window environment (EMSWe)

2026

Q1

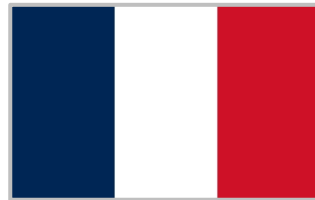


Norway

Q2



Cyprus



France



Italy

European Maritime Single Window environment (EMSWe)

2026

Q3

Q4



Romania



Slovenia



Poland

European Maritime Single Window environment (EMSWe)

2027



European Maritime Single Window environment (EMSWe)

2028



Greece



Germany



FONASBA



ECASBA

The Implementation of EMSWe Directive

Thank you

EMSW UPDATE

PANEL DISCUSSION:

**The benefits and challenges with EMSWe/MSW.
Nemo, the Finnish way.**



FONASBA



ECASBA



Miikka Kälvinmäki

Head of Business Design, Fintraffic VTS



AGENDA TODAY

- Very fast introduction of Fintraffic
- How did we start the EMSW project?
- Cooperation with local stakeholders and other countries
- Implementing the European maritime single window:
Lessons Learned



WHO IS FINTRAFFIC?

- We are public company owned by the state.
- Fintraffic operates under the guidance of Ministry of Traffic and Communications.
- We employ more than 1200 skilled people who work with Rail, Road, Air and Maritime traffic management and systems
- We handle and create a lot of traffic data daily and develop new solutions for different needs.



HOW DID WE START?

- We collected a group of 100+ people from over 70 different organisation to the same table
 - Ministries, Traficom (Traffic and communication Agency), Customs, Coast Guard, Shipowners, Ports, Agents...
 - "What should the system look and feel be like and what problem are we trying to solve?"
 - Create Concept - Validate Concept
Start Development - Validate every 12th week in open demo
- Test real reporting scenarios
Validate edge cases and exceptions
- Communicate changes in terms of operational impact



COOPERATION WITH DIFFERENT ENTITIES

- Transparency is the key – tell the world where and how you are heading.
- Listen the industry. Hear and react to the criticism in every development phase.
- Offer testing opportunities and practical experience.

- Advice your colleagues (Sweden, Netherlands, Estonia...)
- Participation to European funded projects: MISSION and SEMAS



LESSONS LEARNED

- Regulation defines what must be built – execution defines how well it works
- Is the local legislation supporting or limiting
- Most MNSW risks are organisational, not technical. (Not talking about cyber security)
- Interoperability is the foundation: usability protects compliance.
- Users cannot opt out — but they can still fail to comply.
- Data quality is a legal requirement, not a technical detail.
- Go-live is a milestone, not the finish line.

- In MNSW, success is not about being bold - it is about being dependable. (And when it works, nobody notices. That's the point.)



THANK YOU!



EMSW UPDATE



FONASBA



ECASBA

PANEL DISCUSSION:

The benefits and challenges with EMSWe/MSW. Nemo, the Finnish way.



Fredrik Pettersson

Nautic Shipping



CLOSING REMARKS



FONASBA



ECASBA



Raymond Troch

FONASBA VP Europe, ECASBA Chair







FONASBA



ECASBA

ECASBA SEMINAR 2026

Gothenburg