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Editorial

Dear readers,

With rising oil prices and their impact on fuel prices and transport costs, analysts are concerned about the potential implications for global trade growth and changing trade patterns; we discuss some of the key issues in an article on "Fuel prices, transport costs and the geography of trade" (page 4).

Trade facilitation is the topic of articles on trade facilitation opportunities for landlocked and transit developing countries (page 9), a study on the economic impacts of container scanning legislation (page 10), the trade facilitation committee of Afghanistan (page 12), information and communication technologies for trade facilitation (page 13) and a single window initiative in Central Asia (page 16).

We also report on recent and upcoming meetings and introduce new publications which we believe are of interest to policymakers and practitioners in international transport and trade facilitation.

For feedback, comments, and suggestions for our next UNCTAD Transport Newsletter (third issue 2008), please contact Jan Hoffmann at jan.hoffmann@unctad.org before September 2008.

The Trade Logistics Branch Team, Geneva, August 2008

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Fuel prices, transport costs and the geography of trade

Rising costs of oil and fuel

Transport costs are determined by a combination of factors, including geography, trade volumes, economies of scale, infrastructure and administrative processes. Fuel oil, a key cost factor, predominates the energy mix used in transportation. As a result, the relentless rise in oil prices since 2007 is fuelling concerns over the potential implications for transport costs and trade. At over US$140 a barrel in June 2008, some trade observers are suggesting that globalization may be hindered and trade patterns changed, with China's comparative advantage soon coming to an end. This, in turn, would affect transportation strategies, global production plant locations as well as the underlying logic of current global trade flows.

A recently analysis published concluded that "*higher energy prices are impacting transport costs at an unprecedented rate. So much so, that the cost of moving goods, not the cost of tariffs, is the largest barrier to global trade today. In fact, in tariff-equivalent terms, the explosion in global transport costs has effectively offset all the trade liberalization efforts of the last three decades. Not only does this suggest a major slowdown in the growth of world trade, but also a fundamental realignment in trade patterns*".[1]

Another analysis reached a different conclusion, stating that "*it might be considered that higher transport rates caused by higher fuel prices ought to reduce demand for logistics services. Yet the present picture on this is very mixed, with sea freight and, to a lesser extent, air freight volumes still growing modestly. Leading global container shipping companies such as NYK and NOL/APL (…), for example, have both recently reported robust demand in most areas of their business. What has not happened, apparently, is any change in behaviour in the transport market. There is anecdotal evidence that some major shippers are considering adapting their inventory policy to reflect higher transport costs, yet objective evidence of demand does not indicate this. It seems shippers are absorbing some logistics costs in markets which still have sufficient demand. Financial sector bulls such as Goldman Sachs are suggesting there has been a structural change in the energy market which will lead to much higher fuel prices for much of the next decade. That may be so. However, it has yet to feed through into lower demand for freight transport*".[2] These seemingly conflicting views converge, however, on the importance of oil prices for transportation costs.

In this context and while not disputing the importance of spiralling energy prices and their potential long term implications for transport and trade, it is, nevertheless, important that general conclusions should not be drawn at this stage. A comprehensive assessment of rising energy prices on transport and trade should be broad in scope and reflect the global and multidimensional nature of the issue. Analysis of the consequences of rising oil prices would not be complete if conducted in isolation from other closely linked factors that could offset or amplify effects. These include energy security, environmental sustainability, climate change mitigation, technological improvements, efficiency gains and initiatives aimed at reducing trade transaction costs (e.g. transport and trade facilitation). Pressure to increase speed, reliability and ensure just-in-time delivery has lead to the use of faster and more energy-intensive modes such as road transport. Nevertheless, estimated to carry 90 per cent of world merchandise trade (volume; excluding intra-European Union trade),[3] maritime transport remains the backbone supporting globalization and at the core of global transport strategies.

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[1] Rubin J and Tal B. *Will Soaring Transport Costs Reverse Globalization?* CIBC World Markets Inc., StrategEcon. 27 May 2008.

[2] Transport Intelligence. *Soaring fuel prices have yet to dent demand for freight transport*, Transport Intelligence Briefing. 28 May 2008.

[3] See also Transport Newsletter No. 38, March 2008, the article on *The modal split of international goods transport.*

Determinants of maritime transport costs

To suggest that fuel costs are the single most important determinant of trade costs could be misleading, as direct transport costs in the form of freight rates are just a fraction of the entire trade transaction costs. Maritime freight rates themselves are determined by numerous other factors, such as trade imbalances, economies of scale, levels of competition, port infrastructure, private sector participation in port operations, and the type and value of the goods traded.[4]

A closer look at the shipping sector reveals that ship bunkering prices in Rotterdam were 83 per cent higher in June 2008 than in June 2007, and the bunkering bill of major shipping lines was 67 per cent higher in the first quarter of 2008 than in the first quarter of 2007.[5] Fuel costs are now estimated to account for more than half of the overall operating costs of a shipping company. According to Germanischer Lloyd, by November 2007, fuel accounted for 63 per cent of the operating costs of an 8,000-twenty-foot-equivalent-unit (TEU) container ship.[6] It should be noted, however, that, because of the abundance of fuel oil in the world's major bunkering ports, ship bunker prices did not hit the record levels of crude oil prices.[7]

In the logistics sector, policies based on network optimization and intense re-evaluation of supply chains are being adopted in response to soaring fuel costs. "Companies are pooling equipment and loads, moving full container loads and truckloads, and turning to alternative transportation modes – especially rail – while trying to optimize inventory by finding the right mix of warehouse and distribution locations. Shippers are trying to ensure that containers are fully loaded, and they're using more cross-docking and intermodal rail".[8] These strategies are not only offsetting high energy costs, but are also used to obtain more efficiency and long-term sustainability from their distribution networks.

Unlike in the case of domestic transport, taxes on international bunker fuel for maritime transport and on aviation fuel are virtually non-existent.[9] As a result, no mechanism is in place to deflect the full effect of rising prices from maritime transport end users. The maritime industry can, however, take action to avoid spiralling freight rates. The industry has already reacted to rising oil prices by reducing sailing speeds and by reorganizing services. It is estimated that a 10 per cent reduction in speed can lead to a 25 per cent reduction in fuel consumption.[10] According to Hapag-Lloyd, although a lower speed implied "longer voyages, extra operating costs, charter costs, interest costs and other monetary losses, slowing down still paid off handsomely".[11] Additionally, the shipping industry has been investing in more fuel-efficient technologies (hull design, propulsion, engines) and alternative energy sources. More recently, wind energy is attracting attention with giant kites being tested on some freighters (e.g. MV Beluga SkySails). By using the SkySails system, a ship's fuel costs can be reduced by 10 per cent to an annual average of 35 per cent, depending on wind conditions. Under optimal wind conditions, fuel consumption can temporarily be reduced by up to 50 per cent.[12] While the shipping industry may in some cases be able to absorb raising costs without passing them on to shippers, in general, cost-recovery measures in the form of bunker adjustment factor charges are introduced.

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[4] See also: *Transport Newsletter No. 31*. Ports and international transport costs. March 2006; and *Transport Newsletter No. 24*. Recent trends in liner shipping freight rates. June 2004.

[5] See Dynamar Dynaliners, 25/2008. 20 June 2008.

[6] Dynamar BV Transport and Shipping Information, Dynaliners. *Weekly News Summary, Analysis and Commentary on Liner Shipping*, 47/2007. 23 November 2007: 6.

[7] See Lloyd's Ship Manager, *Weak dollar helps push bunker prices back to record levels*. May 2008: 9.

[8] DiBenedetto B. *The Journal of Commerce Online*. Fuel burn: Rising energy costs are spurring companies to re-evaluate supply chains. 18 June 2008.

[9] For additional information on fuel taxation visit the Transport, Health and Environment Pan-European Programme website at http://www.thepep.org/chwebsite/chviewer.aspx?cat=d10.

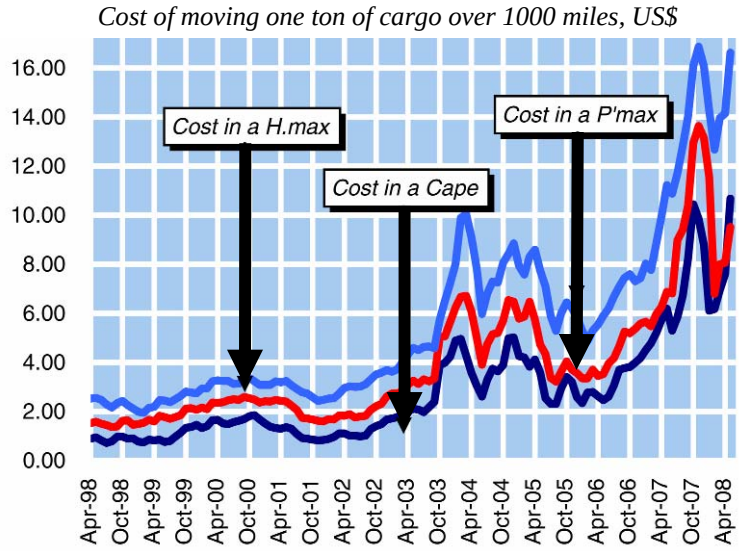
[10] Kirschbaum E. Harnessing kite power to a ship. *International Herald Tribune*. 20 January 2008.

[11] Ibid.

[12] Additional information on SkySails systems and MV Beluga SkySails can be found at http://www.skysails.info/index.php?L=1.

Over recent years, the freight increases have also been fuelled by booming trade and supply-side constraints (e.g. congestion and shortage of capacity). As shown in figure 1, over the last decade, the cost of transporting dry bulk cargo (such as iron ore, coal or grains) per ton-mile has fluctuated increasingly, with more significant surges recorded since 2003. This coincides not only with rising oil prices but also with a booming dry bulk trade, propelled by dynamic growth in emerging economies like China and India. The demand for and supply of shipping capacity are both relatively inelastic in the short term. A shortage of supply, in some cases combined with idle vessel capacity due to port congestion, may very quickly lead to higher vessel charter rates.

Figure 1: Transport cost of dry bulk cargo by ship size



Source: Clarkson Research, Dry Bulk Trade Outlook, *June 2008.*

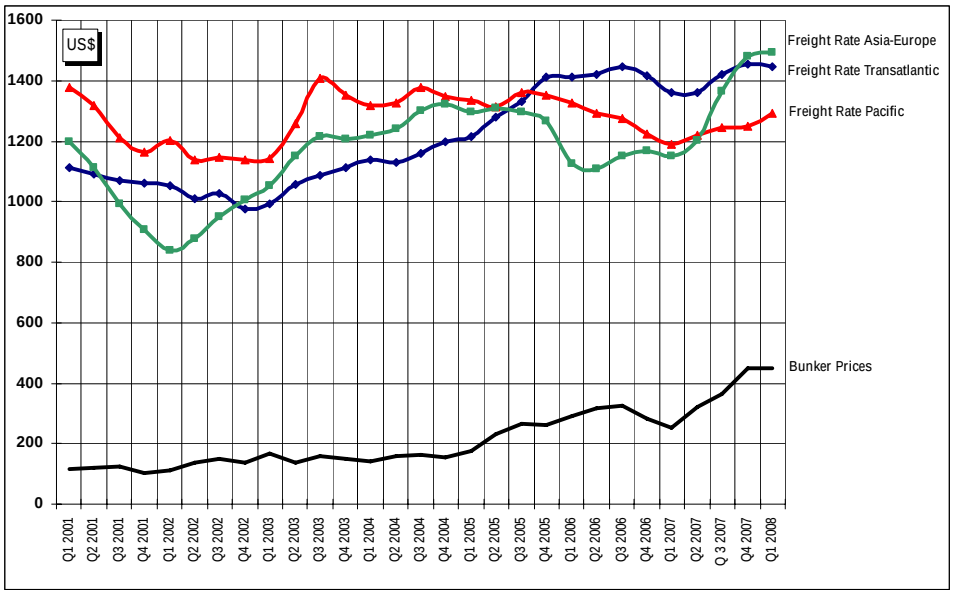
Notes: "H.max" stands for Handymax (ships of 35,000-54,999 deadweight tons); "P'max" stands for Panamax (ships of 55,000-84,999 dwt); and "Cape" stands for Capesize bulk carriers (ships of 80,000 dwt and above, wider than 32.3 m). As a result of economies of scale, transport costs per ton are significantly higher for smaller ships than for larger ships.

Another observation can be made on the trend in the movement of oil prices and transport costs: while oil prices had reached a record high in mid-2006, transport costs had fallen significantly compared to their previous peak at the beginning of 2004. Transport costs have also fluctuated far more than oil prices in the same period. Factors which could explain this include the short-lived oil price increase, the time lag affecting freight rate adjustments (i.e. the terms of the contracts between shippers and carriers), the ability of carriers to absorb the additional costs in view of booming volumes or through operational measures (e.g. sailing speed reduction), and the excess supply capacity that may have prevailed.

Figure 2 shows the evolution in ocean freight rates and bunker prices affecting maritime trade, confirming the observations made above. Owing to speed requirements, container shipping is the biggest fuel consumer of the maritime world. A comparison of the evolution in average freight rates on the three major East-West shipping routes and that in bunker prices highlights that bunker fuel prices and freight rates are not necessarily moving in tandem, and the significant rise in bunker prices that has been observed since the first quarter of 2007 is much greater than the rise in average freight rates over the same period. Between the first quarter of 2007 and the first quarter of 2008, average bunker prices rose by 79 per cent, whereas, over the same period, the average freight rates increased by 9 per cent on the transpacific route, 6 per cent on the transatlantic route and 30 per cent on the Asia-Europe route.

Figure 2: Fuel costs and container freight rates

US$ per TEU (freight rates) and US$ per ton (bunker prices)



Source: UNCTAD, based on data provided by Containerization International www.ci-online.co.uk. Note: Freight rates are averages for East-bound and West-bound freight rates. Bunker prices are for 380 cst, Rotterdam.

Trade patterns and transport costs

Evidently, global trade patterns are influenced by transport costs and connectivity.[13] When analysing 2006 trade data, UNCTAD found a positive correlation (+0.24) between the proportion of goods that can be carried in containers in bilateral trade flows and the distance between the trading partners. "Containerizable" goods are mostly manufactured goods, which tend to have higher value per volume ratio than bulk cargoes such as oil. Thus, higher transport costs are of less relevance to manufactured goods than for bulk cargo. Importers are more likely to source from providers nearby: oil from South America or Mexico is more likely to be exported to other countries in the American continent, while oil from Asian countries is more likely to be exported to other countries in Asia, chiefly because transport costs are lower.

Manufactured goods, on the other hand, tend to travel longer distances as they are more frequently sourced globally. As a percentage of the value of the goods, transport costs – on average – matter less for toys, computers and bottled wine than for most low-value raw materials. Thus, the impact of rising oil prices and increased transport costs varies according to the type of goods transported.[14]

Rising oil prices will have an impact on not only ocean freight rates, but also inland transport rates. In this respect, it is unclear whether the above-mentioned analysis of the situation – to the effect that imports into the United States from China are being increasingly replaced by imports from neighbouring countries such as Mexico or local production – takes into account the impact of higher oil prices on national and regional transport costs (transport done mainly by road).[15] Therefore, while the geography of trade is continuously changing, a direct causal link between rising oil prices and, thus, ocean shipping costs on one hand, and the fall in the United States imports of steel products from China has not been sufficiently established. In this respect, further

[13] See also: *Transport Newsletter No.* 38. The modal split of international goods transport. March 2008; and *Transport Newsletter No. 33*. Trade, liner shipping supply, and maritime freight rates. September 2006.
[14] See also: Drewry, *China's Apparel Supply Chains*, London, 2007, www.drewry.co.uk
[15] Rubin J and Tal B. *Will Soaring Transport Costs Reverse Globalization?* CIBC World Markets Inc., StrategEcon. 27 May 2008.

clarity on the interplay between the effects of transport costs and the United States safeguard measures on imports of certain steel products may be required.[16]

Furthermore, a new geography of trade, involving a reorganization of global production and trading patterns with redefined comparative advantages, does not necessarily entail falling trade volumes or an end to globalization. Global production networks rely heavily on clusters and linkages established within a given geographical area, especially for intermediate goods. The booming intra-Asia trade, estimated at over 40 million TEUs in 2007, is a clear indication of this new geography.[17] Therefore, moving a production plant would involve moving the related business partnerships (sources of raw materials, producers, carriers, assembly, etc.). The cost implications of relocating production plants and related clusters could be significant and could erode the potential comparative advantages sought in the new locations.

New opportunities to realize savings in transport costs may emerge in the context of global warming. The effect of rising oil prices and transport costs may be offset by savings that could be derived from full-year operation of the Northern Sea Route and the opening of the Northwest Passage. The shortcuts offered by the new shipping lanes would cut transport costs and therefore benefit globalization and create further competition with existing routes such as the Panama and Suez canals. The Northwest Passage would offer a new route between Europe and Asia that is 9,000 km shorter than the Panama Canal route and 17,000 km shorter than the Cape Horn route.[18] Taking into account canal fees, fuel costs, and other relevant factors that determine freight rates, the new trade lanes could cut the cost of a single voyage by a large container ship by as much as 20 per cent, from approximately US$17.5 million to US$14 million and would save the shipping industry billions of dollars a year. The savings would be even greater for the megaships that are unable to fit through the Panama and Suez canals and so currently sail around the Cape of Good Hope and Cape Horn.[19] A comprehensive assessment of the potential implications of a fully operational Northwest Passage and Northern Sea Route on trade, existing shipping routes, port development, offshore activity, human settlement, the Arctic's ecosystem, local communities and potential territorial disputes is yet to be completed, however.

Conclusions

In conclusion, rising oil prices are affecting transport costs, including ocean freight rates. While research on the determinants of transport costs and trade-transport cost elasticity abounds, limited analysis has been devoted to the impact of oil prices on transport costs and trade. Accordingly, more analysis is needed and, more importantly, any relevant work in this field requires a broad perspective. A multifaceted approach will need to take into account the intertwined nature of oil prices, transport costs and trade on one hand, and energy security, climate change mitigation, technology advances, trade facilitation measures (e.g. under the auspices of the World Trade Organization) and Aid for Trade (i.e. building supply-side capacity, including by reducing transport costs to take advantage of global markets) on the other. Developments in these areas could have both offsetting and amplifying implications.

Hassiba Benamara, hassiba.benamara@unctad.org, Jan Hoffmann, jan.hoffmann@unctad.org, and Vincent Valentine, vincent.valentine@unctad.org, Trade Logistics Branch, DTL, UNCTAD, and Marco Fugaza, marco.fugaza@unctad.org, Trade Analysis Branch, DITC, UNCTAD.

[16] Dispute cases about steel in which the United States is either complainant or respondent are listed at http://www.wto.org/english/tratop_e/dispu_e/find_dispu_cases_e.htm#results.
[17] See Dynamar, *Dynaliners Trades Review (2008)*: 20.
[18] Wilson K.J. et al. *Shipping in the Canadian Arctic: Other Possible Climate Change Scenarios*. IEEE International. 2004.
[19] Begerson S.G. *Arctic Meltdown – The Economic and Security Implications of Global Warming*. Foreign Affairs. March/April 2008.

Trade facilitation opportunities for landlocked and transit developing countries

UNCTAD preparatory meeting for the mid-term review of the Almaty Programme of Action

In 2003, the United Nations General Assembly adopted the Almaty Programme of Action, a 10-year programme aimed at addressing "The Special Needs of Landlocked Developing Countries within a New Global Framework for Transit Transport Cooperation for Landlocked and Transit Developing Countries" of which UNCTAD is one of the main partner organizations. In 2007, the General Assembly agreed to undertake a mid-term review of the programme of action in October 2008.

In this context, UNCTAD organized a global preparatory meeting on the mid-term review of the implementation of the programme on 8 and 9 July 2008, entitled "Trade Facilitation Opportunities for Landlocked and Transit Developing Countries". The purpose of the meeting was to review the recent progress made in trade-facilitation-related matters for the benefit of landlocked and transit developing countries. The meeting was attended by around 50 representatives of landlocked and transit countries, as well as representatives of intergovernmental and non-governmental organizations and companies.

The chairman's report will be transmitted as a contribution to the High-Level Meeting on the mid-term review, to take place on 2 and 3 October 2008 in New York, United States of America, and will include a call for the international community to provide technical expertise, capacity-building support and financial resources with a view to furthering progress in finding collaborative solutions between landlocked and transit developing countries.

The meeting recommended that the relevant international organizations, including UNCTAD, continue and intensify their efforts on improving transit facilitation along transit corridors during the period 2008–2013, in particular by:

- Putting into effect capacity-building programmes aimed at developing the required competence to set up collaborative arrangements between landlocked and transit developing countries;

- Making transit corridor performance measurement systems available to landlocked and transit developing countries, including necessary training and technological means to make use of these systems.

The proceedings of the meeting are available via http://r0.unctad.org/ttl. For further information please contact Poul Hansen, Trade Logistics Branch, UNCTAD, poul.hansen@unctad.org.

World Customs Organization study on economic impacts of United States legislation requiring 100 per cent container-scanning

An important security initiative worth noting is the recent adoption in the United States of America of legislation requiring 100 per cent scanning of containers destined for the United States to be implemented by 1 July 2012. The implementing recommendation of the 9/11 Commission Act of 2007[20] was ratified on 3 August 2007 and provides that no container loaded on a ship in a foreign port may enter the United States either directly or via another foreign port unless the container was scanned by non-intrusive imaging equipment and radiation detection equipment at the foreign port. In view of the technological and logistical challenges involved in implementing the 100 per cent scanning requirement, the new legislation allows for the 2012 deadline to be extended in two-year increments, provided that scanning systems meet two of the following six conditions: (1) they are not available for purchase or installation; (2) they do not have a sufficiently low false-alarm rate for use in the supply chain; (3) they cannot be purchased, deployed, or operated at ports overseas, including, if applicable, because a port does not have the physical characteristics to install such a system; (4) they cannot be integrated as necessary with existing systems; (5) they will have a significant impact on trade capacity and the flow of cargo; or (6) they do not adequately provide an automated notification of questionable or high-risk cargo as a trigger for further inspection by appropriately trained personnel.

The 100 per cent scanning rule has been challenged both within and outside the United States.[21] Concerns have been raised by, among others, the World Customs Organization (WCO)[22] and major trading partners of the United States, such as the European Union (EU)[23] and China, which argue that the unilateral requirement is difficult to implement.[24] A specific concern arising in connection with the new United States law relates to the potential inconsistency with the WCO Framework of Standards (SAFE Framework) to secure and facilitate global trade and other Authorized Economic Operator (AEO) initiatives which are not based on 100 per cent scanning, but rather on risk management principles. It is also argued that, if implemented, the 100 per cent scanning initiative will impact on more than 700 ports worldwide.[25] According to WCO, if large trading partners were to require reciprocity, the United States would be unable to comply, given the large volume of containerized trade destined for example, for the EU, China, Japan and Australia.[26]

As the new law does not provide spending authorization for the purposes of building capacity (equipment and know-how) in non-United States ports, concerns arise over the extraterritorial feature of the legislation. The cost of implementing the 100 per cent scanning requirement which benefits the United States is expected to be shifted to non-United States parties (e.g. ports, shipping companies, governments and their customs administrations, as well as taxpayers).

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[20] The official text of the relevant provisions of the new legislation can be found at http://thomas.loc.gov/cgi-bin/cpquery/?&dbname=cp110&sid=cp110wSLP0&refer=&r_n=hr259.110&item=&sel=TOC_755356&.

[21] See the written statement by Deputy Commissioner Ahern, United States Customs and Border Protection to the Senate Committee on Commerce, Science, and Transportation and the Subcommittee on Surface Transportation and Merchant Marine Infrastructure, Safety and Security, 12 June 2008.

[22] See, for example, the *New United States Legal Requirements for 100 Per Cent Scanning – the WTO Position*, WCO News No. F55. February 2008: 12.

[23] See EU comments on 100 per cent scanning contained in the *US Customs and Border Protection Report to Congress on Integrated Scanning System Pilots*. Security and Accountability for Every Port Act of 2006: sect. 231.

[24] Stares J. *Europe takes box scanning fight to US Congress*. Lloyd's List. 18 February 2008.

[25] See for example, the United States Government Accountability Office report, *Supply Chain Security, Challenges to Scanning 100 Percent of U.S.-Bound Cargo Containers*, 12 June 2008. The report contained the statement of Stephen Caldwell, Director of Homeland Security and Justice

[26] See *Safe versus 100% Scanning: Interview with Michael Schmitz*, WCO News No. 55: 10.

Finally, it remains unclear whether the requisite technology to scan millions of containers and the expertise of the staff to analyse the scanned images is available or sufficient. A pilot programme of the Secure Freight Initiative to evaluate the feasibility of 100 per cent scanning is still under way, involving seven ports in Honduras, Hong Kong, Oman, Pakistan, Republic of Korea, the United Kingdom and, more recently, Singapore. A progress report providing feedback on the deployment of integrated scanning equipment to the initial three pilot ports in Honduras, Pakistan and the United Kingdom has been presented to United States Congress. Key findings indicate that 100 per cent scanning of United-States-bound maritime containers is possible on a limited scale in low-volume ports, but that it would be difficult to implement in ports handling trans-shipments.[27]

In this context, WCO commissioned a study to assess the economic impact of the 100 per cent scanning law. The results of the study have been recently published in a report entitled *Sécurisation et facilitation de la chaîne logistique globale: les impacts macro et micro-économiques de la loi américaine 100% scanning*.[28] The study assesses United States global container trade, analyses the security-technology and equipment manufacturing sectors and presents scenarios of the potential impact of the United States law, taking into account various trends in logistics and technology developments.

The study concludes that global application of the United States 100 per cent scanning legislation would entail direct and indirect costs, as well as benefits. Direct economic costs include those associated with container scanning and the necessary infrastructure investments. Other potential costs identified include those resulting from delays affecting port operations and causing disruption to logistics chains. The study also highlights the risk of the United States requirements superseding existing international initiatives (e.g. the WCO SAFE Framework), the added burden for developing countries and the possibility of smaller ports being marginalized, cargo diversion in favour of hub ports, loss of know-how (i.e. risk assessment techniques) and some opportunity costs; however, benefits identified in the study include better training of customs staff on analysing scanned images, the digital revolution and related efficiency gains, diffusion of innovation, as well as growth and specialization in the scanning manufacturing sector.

Hassiba Benamara, hassiba.benamara@unctad.org, Trade Logistics Branch, UNCTAD

IAME 2008 conference

The International Association of Maritime Economists (IAME) 2008 Annual Conference was held on 2–4 April 2008 in Dalian, China, on the themes: sustainability in international shipping, port and logistics industries and the China factor.

The conference was jointly organized by Dalian Maritime University, China, and the University of Plymouth, United Kingdom, on 2–4 April 2008. The conference was attended by over 120 academics and practitioners from 26 countries. Dr. Tenfei Wang, Economic Affairs Officer, UNESCAP, chaired the conference. Dr. Zan Yang from the Ministry of Transportation and Communications in China and Ms. Geetha Karandawala from UNESCAP delivered the welcome speeches during the opening ceremony.

Professor Kevin Cullinane gave a talk on issues relevant to the port and shipping industries in China. Development of transport infrastructure in China over the past several decades has been phenomenal; Chinese container ports are prospering and such development should continue.

[27] See footnote 4.

[28] Under the guidance of Fréderic Carluer, University of Le Havre, in collaboration with Yann Alix, Normandy School of Management and Olivier Joly, University of Le Havre.

Until such development is complete, the Government of China has a clear idea of how to improve its inland distribution system. The "Go west" policy is one example of Chinese commitment to improving the link between its western territory and the east coast. The rapid development has been supported by a number of policies, including privatizations and deregulations.

Professor Peter Marlow discussed a topic which is important not only for the shipping and port industries, but also for many other industries in the context of global warming and climate change: sustainability and corporate social responsibility in shipping. Despite its importance, the topic has been inadequately studied. Professor Marlow highlighted the fact that "shipping is very energy efficient, but … transporting one ton of freight one kilometre by container ship releases 225 times more sulphur than hauling the goods by truck", and "the true scale of climate change emissions from shipping is almost three times higher than previously believed".[29] Given such a challenge, Professor Marlow called for the development of a set of shipping sustainability indicators to assess the social and environmental impacts of the shipping industry. These indicators include economic, environmental, social, technological, operational and institutional indicators.

Drawing on ideas set out in *Time Magazine* which listed "10 ideas that are changing the world",[30] Professor Theo Notteboom highlighted what he believed to be the 10 most important research topics for the ports industry today, namely: (1) terminal-hinterland and supply-chain efficiency; (2) ports and the environment; (3) commodities/trades; (4) port governance; (5) significance of ports (economic, social); (6) culture (political, business); (7) port marketing; (8) (port) labour; (9) (traffic) forecasting; and (10) ports and supply-chain security.

During the conference, 99 papers were presented and discussed, of which over 50 papers addressed various issues on the port industry. The main discussions focused on port competition and selection, port governance and management, port policy, port production and simulations etc. Around 25 papers addressed the issue of shipping operations and economics. For the most part, the remainder of the papers studied logistics and supply-chain management. On the subject of geographic coverage, the "China factor" was widely discussed. Simulations and optimization turned out to be the most important tools in terms of the research techniques and methods applied in these papers.

For more detailed information, see http://www.iame2008.org/program.htm or contact Tengfei Wang, tengfei.wang@gmail.com.

AFPRO, the National Trade and Transport Facilitation Committee of Afghanistan

Afghanistan has engaged in a large trade facilitation reform programme that includes the activities undertaken by UNCTAD as part of the World-Bank-funded Emergency Customs Modernization and Trade Facilitation Project in Afghanistan. Under this project, UNCTAD has contributed to the creation of a trade facilitation committee in Afghanistan implementing recommendations on the simplification of international trade procedures. The UNECE Recommendation No. 4 for national trade facilitation bodies encourages States to establish national trade facilitation bodies with a view to "identify issues affecting the cost and

[29] Quotes reported by www.acea.be and *The Guardian.*
[30] http://www.time.com/time/specials/2007/0,28757,1720049,00.html

efficiency of their country's international trade; develop measures to reduce the cost and improve the efficiency of international trade; assist in the implementation of those measures; provide a national focal point for the collection and dissemination of information on best practices in international trade facilitation; and participate in international efforts to improve trade facilitation and efficiency".

In January 2006, President Karzai issued a presidential decree formally establishing the High Trade and Transport Facilitation Committee, later named AFPRO,[31] to serve as a public/private sector forum to strengthen collaboration in addressing the regulatory needs of the transit and transport activities of Afghanistan. This committee encompasses several governmental agencies and ministries including the Ministries of Commerce and Industry, Economy, Finance, Justice, Transport, Mine and Industries, Energy and Water, Communication, Agriculture, the President's Office and the Secretary's Office for the High Council of Ministers, the Department of Environment, as well as representatives from the private sector, primarily traders and service providers, such as chambers of commerce, banks, insurance companies, and the freight forwarders' association (AAFFCO).

AFPRO aims to provide a national forum for stakeholders in Afghan foreign trade, modernize transit, transport and trade procedures and documentation, and strengthen the use of best practices and information and communication technologies (ICTs). AFPRO is headed by an elected chair from the private sector and five vice-chairs (representing the Ministry of Commerce and Industries, the Ministry of Transport and the Ministry of Finance, the Customs Department, a freight forwarding company and a trading company).

In February 2008, UNCTAD assisted in the successful establishment of the AFPRO Secretariat to ensure the committee's proper administration and functioning. The secretariat is to support AFPRO, ensure follow-up of its decisions and undertake background research on trade, transport and logistics. AFPRO will play an important role in the implementation of the trade facilitation project and UNCTAD will therefore continue to provide financial and technical support to the secretariat. Future challenges for AFPRO include ensuring continuous involvement and support from the government, consolidating its role among stakeholders and developing a sustainable financing mechanism to ensure continuity of its activities.

For further information, contact Aurelie Legrand, aurelie.legrand@unctad.org or Jan Hoffmann, jan.hoffmann@unctad.org, both at the UNCTAD Trade Logistics Branch in Geneva; Michaela Eglin, michaela.eglin@unctad.org, Field Project Manager, Kabul; or Mr. Tarzi, tarzih@yahoo.com, Executive Secretary, AFPRO, Kabul.

Recent development in ICTs for trade facilitation

United Nations Centre for Trade Facilitation and Electronic Business forum

At its twelfth forum in Mexico City on 7–11 April 2008,[32] the United Nations Centre for Trade Facilitation and Electronic Business (UN/CEFACT) announced the release of new global standards for efficient and automated information exchange.[33] The use of these new standards, which involve XML (extensible markup language),[34] will affect:

[31] AFPRO formally stands for Afghanistan PRO Committee, where PRO represents "procedures". Today, AFPRO is commonly referred to as the Afghanistan National Trade and Transport Facilitation Committee.
[32] http://www.unece.org/cefact/cf_forums/Mexico_2008/index.htm.
[33] For further information: http://www.unece.org/press/pr2008/08trade_p02e.htm, or contact: trade@unece.org.
[34] The XML standards developed by UN/CEFACT build on a globally consistent framework of processes and data that are common to a wide range of industries and governmental transactions. They have been specifically developed to foster interoperability, i.e. data being exchanged between different systems and organizations.

- **E-Tendering for public procurement**, covering more than 20 types of electronic transactions, ranging from information notices to contract awards. The standard comprises a set of messages to standardize the information exchange in the field of electronic tendering/bidding across industries. It can be used in all kinds of tender and can be used in the works, goods and services domains.
- **Project schedule and cost performance management**, involving 10 electronic transactions. The objective is to help the various parties in an architectural, construction or engineering project to exchange project-management-related schedules and cost data throughout the life of the project using a standardized information-exchange process and data-content framework.
- **Small-scale lodging house project**, providing messages to allow a customer to request and receive information on small-scale lodging houses for tourism (such as the ryokan found in Japan).

Additional Protocol on electronic consignment notes

On 27 May 2008, seven countries (Belgium, Finland, Latvia, Lithuania, Norway, Sweden, and Switzerland) signed a new United Nations Economic Commission for Europe (UNECE) protocol which will ease international road freight and further improve good governance in road transport by allowing the use of electronic consignment notes.[35]

The new protocol is an additional protocol to the UNECE Convention on the Contract for the International Carriage of Goods by Road (CMR). It sets out the legal framework and standards for using electronic means of recording and storing consignment note data, making information transfer faster and more efficient than with paper-based systems. The CMR agreement, which is the standard regulation for goods transport contracts, was established in 1956[36] and currently has 53 contracting parties.

The Additional Protocol to the UNECE Convention on the Contract for the International Carriage of Goods by Road (CMR) concerning the Electronic Consignment Note[37] is now open for signature at United Nations Headquarters in New York until 30 June 2009, inclusive. The protocol shall enter into force on the ninetieth day after five of these States have deposited their instruments of ratification or accession.

Paperless trading symposium

On 26–28 May 2008, in Seoul, Republic of Korea, the Asia-Pacific Economic Cooperation (APEC) Electronic Commerce Steering Group and the United Nations Centre for Trade Facilitation and Electronic Business (UN/CEFACT) organized a joint capacity-building symposium on paperless trading.[38] This symposium was proposed in 2007, at the initiative of APEC member economies, to launch practical collaborative work on paperless trading.

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[35] For further information: http://www.unece.org/press/pr2008/08trans_p05e.htm, or contact Mrs. Eva Molnar, Director, or Mrs. Virginia Tanase, Road Transport and Road Safety Section, UNECE Transport Division, Palais des Nations, CH-1211 Geneva 10, Switzerland. Phone: +41 (0) 22 917 24 00, 917 32 59. Fax: +41 (0) 22 917 0039. E-mail: eva.molnar@unece.org or virginia.tanase@unece.org.

[36] Convention on the Contract for the International Carriage of Goods by Road (CMR), of 19 May 1956. English version: http://www.unece.org/trans/conventn/cmr_e.pdf. For other versions and information, see line 25 of the summary list of international UNECE transport agreements and conventions at http://www.unece.org/trans/conventn/legalinst.html.

[37] Additional Protocol to the CMR concerning the electronic consignment note, adopted by the Inland Transport Committee at its seventieth session on 19–21 February 2008.
English (authentic) version: http://www.unece.org/trans/doc/2008/sc1/ECE-TRANS-2008-CRP-01a1e.pdf.
French (authentic) version: http://www.unece.org/trans/doc/2008/sc1/ECE-TRANS-2008-CRP-01a1f.pdf.
Russian version: http://www.unece.org/trans/doc/2008/sc1/ECE-TRANS-2008-CRP-01a1r.pdf.

[38] Official website: http://www.apecun-korea.org/.

The focus of the symposium was on identifying instruments that would enable a phased development of paperless trading among APEC member economies. Currently, a number of APEC countries are already quite advanced in implementation, whereas others are less ready to adopt paperless trading. The symposium concluded that the major factors hindering the implementation of paperless trading in APEC are a lack of necessary regulatory support, insufficient capacity-building support and a lack of skilled human resources. It was agreed that the use of open, harmonized international standards is critical for successful cross-border paperless trading.[39]

To advance the implementation of paperless trading in APEC, a number of activities were recommended at the symposium, including:

- A ministerial meeting on e-commerce that would engage high-level support from political and economic leaders;
- A joint capacity-building programme for APEC developing countries between APEC and United Nations regional commissions, namely ECE, ESCAP and ECLAC;
- A joint APEC-UN/CEFACT task force to be set up to develop both a common mission statement and projects for promoting the United Nations international standards and recommendations;
- The use of the UN/CEFACT Core Component Library as the foundational data standard for cross-border paperless trading
- A special action to encourage the private sector, including industry associations, to get involved in developing paperless trading and related standards
- A call for UN/CEFACT to consider requests for developing recommendations related to the Single Window and to include a paperless-trading capacity-building project in the UN/CEFACT Electronic Business, Government and Trade project that is being launched.

Bismark Sitorus, bismark.sitorus@unctad.org, Trade Logistics Branch, UNCTAD

World Economic Forum, *The Global Enabling Trade Report 2008*

In June 2008, the World Economic Forum (WEF) of Geneva, Switzerland, published its first report on trade facilitation competitiveness, presenting a cross-country analysis of a large number of trade and transport facilitating measures. *The Global Enabling Trade Report 2008*, which covers 118 countries worldwide, will be particularly useful for policymakers, as it provides meaningful guidance on trade priorities.

The main feature of the report, the Enabling Trade Index, measures the factors, policies and services facilitating the free flow of goods over borders and to destinations. The index breaks the trade enablers into four overall issue areas: (1) market access, (2) border administration, (3) transport and communications infrastructure and (4) the business environment.[40] The report also includes an extensive section of data tables, including each indicator used in the Enabling Trade Index's computation. Not surprisingly, Hong Kong and Singapore occupy the top two positions in the index ranking.

[39] For further information, see http://www.unece.org/press/pr2008/08trade_p04e.htm, or contact trade@unece.org.
[40] http://www.weforum.org/en/initiatives/gcp/GlobalEnablingTradeReport/index.htm.

Table 1: World Economic Forum Global Enabling Trade Index 2008

(Top 10 countries)

Economy	Rank 2008	Score
Hong Kong SAR	1	6.04
Singapore	2	5.71
Sweden	3	5.66
Norway	4	5.65
Canada	5	5.62
Denmark	6	5.62
Finland	7	5.61
Germany	8	5.58
Switzerland	9	5.58
New Zealand	10	5.52

Source: WEF Global Enabling Trade Report 2008

The results show that Hong Kong and Singapore are not only open to international trade and investment, but have also put into place highly efficient customs administrations and well-developed transport and telecommunications infrastructures; factors conducive to facilitating trade, transport and logistics.

The Global Enabling Trade Report 2008 was drawn up by WEF in close collaboration with a number of international partners and features a number of contributions from trade experts and practitioners with relevant knowledge and experience in reducing barriers to trade and national trade performance.

UNCTAD has contributed to the report, providing data from the UNCTAD Liner Shipping Connectivity Index. Furthermore, UNCTAD has provided a separate article to the report, on a sustainable approach to facilitating cross-border movement of goods. The article describes the increasing focus on elimination of non-tariff barriers as a major factor for countries succeeding in the globalized trading environment.[41]

The full Global Enabling Trade Report 2008 *rankings and report highlights can be downloaded from the WEF website http://www.weforum.org/getr08. For more information, please contact Poul Hansen, poul.hansen@unctad.org, Trade Logistics Branch, UNCTAD.*

Single window: a priority for achieving regulatory harmonization in Central Asia

During a three-day seminar on single window and data harmonization in Central Asia, organized by the United Nations Economic and Social Commission for Asia and the Pacific (UNESCAP) with the United Nations Economic Commission for Europe (UNECE), a single window was agreed to be a priority solution for achieving regulatory harmonization and reducing corruption.

The seminar took place on 5–7 May 2008, in Baku, Azerbaijan, under the joint UNESCAP/UNECE trade facilitation project for Central Asian countries. More than 30 participants attended the seminar, representing the customs agencies, ministries responsible for trade, single window operators and academia from the countries of the United Nations Special Programme for the Economies of Central Asia (SPECA) namely, Afghanistan, Azerbaijan, Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan and Uzbekistan, as well as representatives and experts from China, Hong Kong; Sri Lanka; Sweden; Thailand, and Turkey.

Participants were introduced to international standards and tools for developing a single window and for the simple and harmonized trade data. They also learned about success stories in implementing and operating single window systems in Asia and Europe.

[41] www.weforum.org/pdf/GETR08/Chap%201.5_Facilitating%20Cross-Border%20Mvt%20of%20Goods.pdf

The majority of the Central Asian countries are at a very early stage of developing their national single window concepts that requires lots of analytical and preparation work to make sure that they will opt for the best single window model matching their needs. The ASEAN single window approach was seen as a good practice that might be followed by this subregion.

Participants shared concerns about a lack of a formally appointed lead agency to spearhead a single window concept, although it was agreed that in majority of countries this role might be entrusted to customs.

Another problem was the lack of a clear understanding on the technical issues involved in establishing a single window system, such as methodologies for re-engineering processes, simplification and harmonization of data and selection of a proper information system. UNESCAP and UNECE presented their existing and future tools that might help the countries to solve these problems and provide the means to implement the global standards for aligned trade documents and data (such as the United Nations Layout Key, the United Nations Trade Data Elements Directory and United Nations electronic trade documents, UNeDocs). Another such ready-to-use solution is the United Nations Trade Facilitation Toolkit and Forms Repository, which provides a web-based tool for developing national sets of trade documents aligned to the Layout Key. Another set of tools, which will be issued jointly by UNESCAP and UNECE in the near future, comprises: a process analysis handbook (for developing single window and paperless trade environments), a UNeDocs implementation guide and an expanded Trade Facilitation Toolkit and Forms Repository for Central Asia.

For more information about the seminar proceedings and outcome, please visit http://www.unescap.org/tid/projects/singlewin.asp or contact Ms. Maria Misovicova, UNESCAP, misovicova@un.org.

ISO/ TC 154

The Technical Committee (TC) 154 of the International Organization for Standardization (ISO) covers processes, data elements and documents in commerce, industry and administration. Its Secretariat has recently moved to the Netherlands.[42] Upon Mr. Francois Vuilleumier's retirement as chairman and secretary, Mr. Gertjan van den Akker has been appointed as the new secretary, and Mr Robert Schubenel as the new chairperson.

TC 154 aims to ensure the international standardization and registration of business, and provide administration processes, supporting data used for information interchange between and within individual organizations and support for standardization activities in the field of industrial data. The development and maintenance of application specific meta-standards include the following areas:

- Process specification;
- Data specification with content;
- Form layout;
- Standards for process identification;
- Data identification; and
- Maintenance of the electronic data inter-change for administration, commerce and transport (EDIFACT) Syntax Rules.

To date, 25 ISO standards have been published under the direct responsibility of TC 154. TC 154 has 19 participating countries and 27 observing countries.

Visit www.iso.org.

Maritime Education and Training Conference

Kirkwall, Orkney Islands, Scotland, United Kingdom, 30 May 2008

The present order book of new vessels has raised concerns whether the supply of qualified seafarers will grow sufficiently fast to sustain the fleet that will enter into service in coming years. It is estimated that manning the 10,000 ships presently on order will require 400,000 newly

[42] ISO has re-allocated its secretariat to the Netherlands Normalisatie-instituut (NEN), http://www2.nen.nl/nen/servlet/dispatcher.Dispatcher?id=ABOUT_NEN

trained crew. Already in 2007, carriers reported an acute shortage of officers, and the shortage is expected to escalate. Some of the maritime accidents that happened in 2007 are thought to be the consequence of the employment of insufficiently experienced on-board personnel. Specialized ships, such as liquefied natural gas (LNG) tankers, require a specialized work force, and officers are increasingly seeking employment ashore, where job opportunities in the area of port operations and maritime administrations are also growing in line with the booming trade.

These and related issues were discussed at the Maritime Education and Training Conference. Presentations are now available online.

Jan Hoffmann, jan.hoffmann@unctad.org, Trade Logistics Branch, UNCTAD.
For further information visit www.nsr.nm-uni.eu/events/44-events/72-nmu-imec-conference-presentations or contact Alfred J. Baird, Napier University's Transport Research Institute (TRi), (A.Baird@napier.ac.uk)

Maritime Container Shipping

Prof. Dr. Thomas Pawlik and Heinrich Hecht. Hanseatic Lloyd Reederei GmbH & Co. KG, Bremen. 144 pages, bound, 120 colour illustrations.

German edition: ISBN 978-3-89880-873-6

English edition: ISBN 978-3-89880-874-2

The new publication points out how chains of container transport span the globe and explains the structures of container liner shipping. The book shows that there are virtually no goods nowadays that are never shipped on board container vessels. In addition to the important duties of the ship's crew, readers get to know the workflows at container terminals and seaport hinterland logistics, as well as key aspects of shipbuilding, environmental protection and safety in container shipping.

Heel Verlag GmbH, Gut Pottscheidt, 53639 Königswinter / Germany; info@heel-verlag.de or www.amazon.de.

Port security as a competitive advantage

The Dominican Republic hosted the Third Hemispheric Conference on Port Security, which took place on 7–10 April 2008, sponsored by the Organization of American States (OAS) and its Inter-American Committee on Ports, the Dominican Republic's Port Authority and the specialized port security unit CESEP.

Delegates came from the OAS member States and observers from Canada, the European Union, the International Maritime Organization, and the World Customs Organization, among others.

Presentations on the situation of the host country highlighted the positive role played by the close cooperation between government and business, including in the area of port security and port infrastructure. Public-private partnerships were also key to the country's compliance with the International Ship and Port Facilities Security (ISPS) Code, the Business Alliance for Secure Commerce, United States Customs' Container Security Initiative and ISO 28000 certification. Moreover, the new legal framework of the Dominican Republic helped reducing the number of stowaway cases to zero

Case studies on maritime security in the following countries were also presented: Argentina, Barbados, Brazil, Chile, El Salvador, Grenada, Guatemala, Honduras, Jamaica, Mexico, Paraguay, Peru, Saint Lucia, Suriname, Trinidad and Tobago, Uruguay and the Bolivarian Republic of Venezuela.

The conference further examined the costs of ISPS Code compliance, and potential for faster cargo handling and lower lead times. In particular, the port marketing potential for faster and securer ports was debated throughout the conference.

Other related topics covered during the conference were the impact of sanitary policies and regulations on shipping business and documentation requirements for crew to comply with the ISPS Code and other maritime security-related regulations.

For further information, contact Maria Núñez, maria@cnc.gov.do, National Competitiveness Council (CNC), Dominican Republic, or visit the OAS conference website under http://www.oas.org/cip/eng/Courses_Seminars/2008%20courses%20&%20conferences/Rep%20Dominicana.htm.

Maritime Economics and Logistics PhD competition

In pursuit of its commitment to promoting quality research and strengthening research links, particularly among young researchers, the Center for Maritime Economics and Logistics (MEL) is organizing its third competition for the best PhD theses that were successfully defended during the period 1 July 2005–30 June 2008.

Submissions will be peer-reviewed by an international jury. The Palgrave Macmillan Prize for best PhD thesis will be awarded at a ceremony that will take place in November 2008 in Rotterdam, where the finalists will be given the opportunity to present their subject.

Authors should submit three copies of their thesis to the MEL editorial address in Rotterdam, plus a paper of around 6,000 words outlining the essence of the thesis in electronic format by 15 September 2008.

For further information contact Michele Acciaro, acciaro@few.eur.nl, MEL, Rotterdam, Netherlands.

Chahbahar, Transit and Eastern Corridor development

UNCTAD participated in the meeting on Chahbahar, Transit and Eastern Corridor development of the Islamic Republic of Iran – Opportunities and Challenges, held in Tehran, Islamic Republic of Iran, on 24–25 May 2008. The UNCTAD representative present shared elements of UNCTAD work: (1) in the Economic Cooperation Organization region and its member States; (2) on issues related to trade facilitation; and (3) on relevant issues of port logistics as highlighted in the UNCTAD *Review of Maritime Transport*.

For additional information, please contact Sham Bathija, sham.bathija@unctad.org, Trade Logistics Branch, DTL, UNCTAD.

World Customs Journal

The *World Customs Journal* is the flagship publication of the International Network of Customs Universities, which provides the World Customs Organization (WCO) and other organizations with a single point of contact with universities and research institutes that are active in the field of customs research, education and training.

Launched at the WCO headquarters in March 2007, the *Journal* fills a gap in the market for research into customs and other border management issues, and is an excellent global resource for international organizations, governments and the private sector and an educational source for students wishing to further their knowledge in the field of border management.

The *World Customs Journal* is designed to provide customs professionals, academics, industry researchers, and research students with an opportunity to share and draw upon research, academic commentary and practical insights to enhance its readers' knowledge and understanding of all aspects of customs and other border management responsibilities.

The next edition of the *Journal* will focus on the increasingly important issue of capacity building. Contributions are welcome from both the academic world and border management practitioners.

The Journal *and guidelines for contributors are available at www.worldcustomsjournal.org.*
David Widdowson, David.Widdowson@canberra.edu.au, University of Canberra, Centre for Customs and Excise Studies

Single window conference in Senegal

Dakar, 5–7 November 2008

Organized at the initiative of the Government of Senegal and in collaboration with UN/CEFACT and several international partners, including UNCTAD, the conference is intended to be a platform of exchanges on the single window concept gathering delegates from the different regions of the world, representatives of countries with single window experience and bodies promoting the implementation of the single windows, and international experts. This first conference is expected to give participants a clear-cut idea of the concept and delve into the various implementation approaches.

http://www.gainde2000.sn/single

More detentions due to risk analysis

Improved targeting, based on information-sharing and risk analysis, has allowed the rate of inspections the Tokyo Memorandum of Understanding on Port State Control to be reduced, while at the same time increasing the likelihood of detecting serious deficiencies.

http://www.tokyo-mou.org/ANN07.pdf

International Marine Environment Certificate (IMEC)

IMEC is a project aimed at developing a certificate documenting personal environmental skills in marine and maritime issues. Increased and more diversified exploitation of marine resources must necessarily be followed by greater focus on sustainable practices and environmental awareness. In this respect, IMEC will become a supplementary tool in legislation and environmental management systems. The core idea of IMEC is to raise awareness and knowledge of marine environmental issues among staff working at sea.

IMEC shall consist of a standardized education package which is common for all the partner countries. IMEC shall offer individuals documented knowledge through an Internet-based certification test. The certificate itself should be made available through a wide range of training possibilities; self study, courses in companies or as one-off courses in existing maritime education institutions. The IMEC theoretical platform could also become an integrated part of the existing education plan in maritime comprehensive schools.

www.imec.no

Transportation Research Board (TRB)

Thirty-Third Annual Summer Ports, Waterways, Freight, and International Trade Conference

Select presentations are now available from the TRB-sponsored Thirty-Third Annual Summer Ports, Waterways, Freight, and International Trade Conference that was held on 18–20 June 2008 in Baltimore, Maryland, United States. The presentations available cover such issues as integrating different freight transportation interests, expanding global all-water trade routes, future growth in international trade, the best use of waterfront areas and international food aid transport.

http://www.trb.org/conferences/2008/PW/08PWFIT.pdf

New Contracting Party to the international maritime convention adopted under the auspices of UNCTAD

United Nations Convention on the Carriage of Goods by Sea, 31 March 1978 (Hamburg Rules)

The convention entered into force on 1 November 1992 and has 34 contracting States, the most recent of which is Kazakhstan, which acceded to the convention on 18 June 2008.

For more information on the latest status of this and other conventions, please visit www.unctad.org/ttl/legal.