

# UNCTAD Transport Newsletter



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## NOTE

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## Editorial

Just out: UNCTAD's Review of Maritime Transport (RMT) 2008. UNCTAD's RMT is published in its 40<sup>th</sup> year - key issues are summarized on page 4.

UNCTAD's first Training of Trainers Workshop for English-speaking Port Communities of Asia and Africa took place in Dublin in September and October 2008. Participants came from ports in Ghana, Indonesia, Malaysia, Maldives and Tanzania (see page 5).

UNCTAD is happy to report again on its annual UNCTAD Liner Shipping Connectivity Index – LSCI 2008, already in its fifth year. Analysing recent trends, we find that the number of ships, the maximum ship size and the total twenty-foot equivalent units (TEU) capacity deployed per country have increased since 2004, whilst the number of services and the number of companies as an indicator of competition have decreased (page 7).

UNCTAD has supported several national workshops on multimodal transport in the region of the Economic Cooperation Organization (ECO), promoting concepts and benefits of multimodal transport and discussing its influences on carrier liability and standard qualifications required for operators, as well as national strategies to promote multimodal transport (page 15).

Building on its long experience in customs modernization and automation, UNCTAD has begun work on the development of the ASYCUDA Single Window System. This System will link customs, other government agencies and the business community in an interactive network that provides a single entry point for the submission and processing of all import, export and transit-related documents and data. Development and implementation of the System involves simplifying trade procedures and processes, standardizing data and documents and connecting all the participants in the international trade transaction (page 16).

In further shorter articles, we report on activities and publications of the Committee on Maritime Transport of the International Chamber of Commerce (ICC), a World Bank book on transport prices and costs in Africa, outcomes of a maritime disasters workshop, SITPRO's research on the cost of paper in the supply chain, the Single Euro Payment Area (SEPA) and electronic invoicing, containerized reefer trades, the work of the United Nations Commission on International Trade Law (UNCITRAL) on the Single Window, and the regular update on new contracting parties to the international maritime conventions adopted under the auspices of UNCTAD (after page 18).

For feedback, comments and suggestions for our next UNCTAD Transport Newsletter (fourth issue 2008), please contact Jan Hoffmann at [jan.hoffmann@unctad.org](mailto:jan.hoffmann@unctad.org) before December.

*The Trade Logistics Branch Team, Geneva, November 2008*

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## UNCTAD's Review of Maritime Transport: Freight rates begin to fall for World Merchant fleet

The Review of Maritime Transport suggests early 2008 marked the high point of the shipping boom but a decline in the Baltic Dry Index indicates that the financial crisis has spread to international trade, with negative implications for developing countries, especially those dependent on commodities.

International seaborne trade in 2007, driven by emerging and transition economies, surpassed a record 8 billion tons, the *Review of Maritime Transport 2008* (RMT) reports. Strong demand for shipping services helped push to unprecedented highs the cost of moving dry bulk commodities internationally, as echoed by the Baltic Dry Index (BDI) through the first quarter of 2008. (The BDI is a composite of shipping prices for various dry bulk products such as iron ore, grain, coal, bauxite/alumina and phosphate, and is a useful indicator of price movements.) More recently, however, the BDI has declined more than 11-fold: from 11,793 points in May 2008 to 891 as of early November. This shows that the unfolding financial crisis has spread to international trade with negative implications for developing countries, especially those dependent on commodities.

More than 80% of international trade in goods is carried by sea, and an even higher percentage of developing-country trade is carried in ships.

The Review, an annual publication prepared by the UNCTAD secretariat, is an important source of information on this vital sector. It closely monitors developments affecting world seaborne trade, freight markets and rates, ports, surface transport, and logistics services, as well as trends in ship ownership and control and fleet age, tonnage supply, and productivity. The Review contains a chapter on legal and regulatory developments and each year includes a chapter highlighting a different region. In 2008, the focus is on Latin America and the Caribbean. Key developments reported this year's Review include the following:

- In 2007, world seaborne trade (goods loaded) increased by 4.8% to surpass 8 billion tons for the first time.
- By the beginning of 2008, the total world merchant fleet had expanded by an impressive 7.2%, to reach 1.12 billion deadweight tons (dwt). The tonnage of oil tankers increased by 6.5% and that of bulk carriers by 6.4%. These two types of ships together represent 71.5% of total merchant fleet tonnage, a slight decrease from 72.0% in January 2007.
- At the beginning of 2008, the average age of the world fleet dropped marginally, to 11.8 years. Containerships made up the youngest fleet with an average of 9 years.
- By May 2008, the world containership fleet had reached approximately 13.3 million twenty-foot equivalent units (TEUs), of which 11.3 million TEUs were on fully cellular containerships. This fleet included 54 containerships of 9,000 TEUs and above, which were operated by five companies: CMA-CGM (France), COSCON and CSCL (both from China), Maersk (Denmark) and MSC (Switzerland).
- World container port throughput grew by an estimated 11.7% to reach 485 million TEUs in 2007, the Review reports. Chinese ports accounted for about 28.4% of total world container port throughput.
- Rail freight traffic for 2007 grew by 28% in Saudi Arabia, 12.6% in Viet Nam, 9.4% in India, 7.6% in China, 7.2% in the Russian Federation, and by 1% in Europe and the United States.
- An important development in the field of security relates to the certification and mutual recognition of Authorized Economic Operators (AEOs), both at the EU level and under the World Customs Organization (WCO) Framework of Standards to Secure and Facilitate Global Trade (SAFE Framework).
- In the area of environmental regulation is the intensive and expedited work by the International Maritime Organization (IMO) on greenhouse gas emissions from ships. The aim is to develop a binding international regime for adoption in 2009.

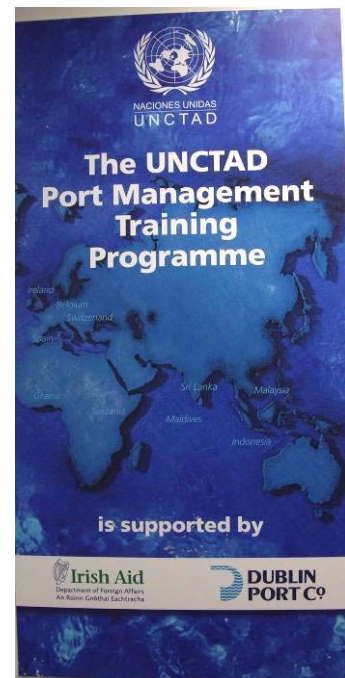
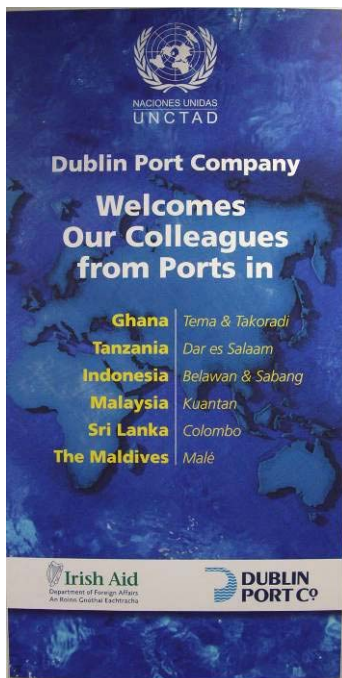


## UNCTAD's first Training of Trainers Workshop for English-speaking Port Communities of Asia and Africa

*Dublin, Ireland, 22 September/10 October 2008*

In November 2007, UNCTAD and the Ministry of Foreign Affairs of Ireland signed an agreement under which the Irish development agency (Irish Aid) granted 475,000 Euros to the TrainForTrade Port Training Programme for Selected English-speaking Port Communities. This event came as the result of the adoption of the Dublin Declaration in June 2007 by 60 representatives from Benin, Cape Verde, Gambia, Ghana, Namibia, Nigeria, Sierra Leone and the United Republic of Tanzania in Africa; Cambodia, India, Indonesia, Malaysia and Sri Lanka in Asia, as well as representatives of port partners from France, Ireland, Portugal and Spain.

Following these two main events, fact-finding missions were organized by UNCTAD and the Dublin Port Company to selected port communities of Ghana, Indonesia, Malaysia, the Maldives, Sri Lanka and Tanzania to assess needs of local port communities in the areas of human resources development, training and capacity-building.



The next step in the development of the English-speaking network of UNCTAD's Port Training Programme was the organization of the first Training of Trainers workshop of the "Modern Port Management" course on Modules 1 to 4, in Dublin, Ireland, from 22 September to 10 October 2008. A total of 31 instructors from the port community of Dublin, UNCTAD and from other port partners delivered the following modules:

- Module 1: International trade and transport
- Module 2: The organization of a port system
- Module 3: The functioning of a port system
- Module 4: Future challenges of the port



A total of 15 participants were selected amongst senior managers of port communities from:

- Tema, Takoradi and Accra in Ghana: 3
- Sabang and Medan in Indonesia: 7
- Kuantan in Malaysia: 1
- Male in the Maldives: 1
- Dar-Es-Salaam in Tanzania: 3

At the end of this workshop, the participant selected senior managers of the targeted port communities who have acquired the skills and knowledge to serve as trainers in their own countries. They will be able to use the teaching materials of the Port Training Programme to replicate the training at the national level for the benefit of middle managers from their own port communities in Asia and in Africa with the support of UNCTAD.

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## UNCTAD Liner Shipping Connectivity Index - LSCI 2008



Access to world markets depends to a large extent on the availability of regular and efficient maritime transport connections, especially liner shipping services. UNCTAD's Liner Shipping Connectivity Index (LSCI) aims at capturing a country's level of integration into the existing liner shipping network by measuring liner shipping connectivity. The LSCI was first introduced in Transport Newsletter #27, 1st Quarter 2005, as an indicator of liner shipping connectivity for 162 countries.<sup>1</sup> In 2008, Tuvalu was added to the countries, so that the index is now generated for 163 countries. The index is calculated based on five components: (1) number of ships; (2) the container carrying capacity in twenty-foot equivalent units (TEUs) of those ships; (3) the number of companies; (4) the number of services; and (5) the maximum ship size, always referring to the ships that are deployed to provide liner shipping services to a country's port(s). The underlying data is derived by UNCTAD from Containerisation International on-line ([www.ci-online.co.uk](http://www.ci-online.co.uk)).

As of July 2008, China continued to lead the LSCI ranking. Morocco moved up 49 steps in its ranking by improving its index by 21 points compared to 2007. The Philippines, Portugal and Australia also boosted their index, by double-digit figures. Cyprus, Jamaica and Greece experienced a negative change in their index, affecting their ranking in 2008. Cyprus moved down from rank 49 to rank 73, Jamaica from 37 to 52, and Greece from 26 to 36. The United States, United Kingdom and Taiwan Province of China experienced for the second consecutive year a decrease in their index of some 3 points.

### *Deployment of container ships*

"Fleet deployment"<sup>2</sup> is the number of ships that national and international liner shipping companies assign to liner services from and to the country's ports. A larger number of ships is an indicator that a country's shippers have more opportunities to load their containerized exports, i.e. that they are better connected to foreign markets.

Table 1 shows the 10 economies with the highest number of container ships deployed on liner services from and to their ports in 2008, together with the respective data for July 2007 and the corresponding percentage change. Among the top ten, Singapore, China and Belgium show the greatest percentage gains (+10.5, +10.1 and +7.8 per cent respectively), whilst the countries which suffered the greatest negative percentage change were the United States, the Republic of Korea and Germany (-5.6%, -4.1% and 0.2% respectively). As of July 2008, 1,705 vessels from the world container fleet, approximately 4,300 vessels,<sup>3</sup> included at least one Chinese port in their liner services.



<sup>1</sup> [http://www.unctad.org/en/docs/sdtetlbmisc20051\\_en.pdf](http://www.unctad.org/en/docs/sdtetlbmisc20051_en.pdf)

<sup>2</sup> For the purpose of this article, "deployment" and "assignment" are used synonymously. Although a ship can only be deployed at one place at one time, if it is assigned to a given route covering several countries, it will effectively be deployed to these same countries over a period of time.

<sup>3</sup> This figure includes only dedicated fully cellular container vessels, whereas the actual container carrying fleet capacity is higher than this sum as other types of vessels (e.g. general cargo or Ro-Ro ships) are also capable of carrying containers.

In terms of the longer term change between July 2004 and July 2008, a total of 94 countries received a larger number of ships in 2008, 8 countries saw no change, and the remaining 60 countries recorded a decrease in the number of vessels received.

**Table 1: Fleet deployment (number of ships)**

Rank 2008	Country or territory	2008	2007	% change 2008/2007
1	China	1,705	1,549	10.1
2	Hong Kong, China	1,249	1,225	2.0
3	Singapore	1,078	976	10.5
6	United States	994	1,053	-5.6
4	Germany	872	870	0.2
9	Malaysia	827	772	7.1
8	Belgium	811	752	7.8
7	United Kingdom	807	795	1.5
5	Netherlands	791	771	2.6
10	Korea, Republic of	770	803	-4.1

*Deployment of container carrying capacity (TEU)*

A similar picture is obtained if we look at the deployment of container carrying capacity, i.e. the number of slots for twenty-foot equivalent units (TEUs).<sup>4</sup> Given the growing average size of container ships, TEU deployment tends to grow faster than vessel deployment. Consequently, nine of the top ten countries recorded positive growth over the past year, versus only one country (United States) that experienced a decrease in TEU deployment (Table 2). Globally, 127 countries recorded positive growth between July 2004 and July 2008, one country experienced no change, and the remaining 34 countries saw a decline over this period.



**Table 2: Fleet deployment (TEUs)**

Rank 2008	Country or territory	2008	2007	% change 2008/2007
1	China	6,554,051	5,731,773	14.3
2	Hong Kong, China	4,859,478	4,545,742	6.9
3	Singapore	3,564,190	2,972,878	19.9
4	United States	3,146,894	3,235,986	-2.8
5	Germany	3,088,491	2,848,002	8.4
6	Malaysia	2,762,426	2,581,455	7.0
7	United Kingdom	2,705,854	2,570,153	5.3
8	Netherlands	2,693,091	2,487,953	8.2
9	Korea, Republic of	2,557,565	2,458,903	4.0
10	Belgium	2,398,796	2,255,364	6.4

<sup>4</sup> TEU stands for a twenty-foot equivalent unit. The number of TEUs reflects the container carrying capacity of a ship, not the actual containerized trade carried.



### *Number of liner shipping companies*

The downward trend in the number of liner shipping companies has continued in 2008 due to mergers and acquisitions and an overall trend towards consolidation. The average number of liner shipping companies providing services per country has further declined by -4.4% between 2007 and 2008. The highest number of companies is recorded for the Netherlands (Table 3). Over the four-year period from 2004 to 2008, 44 countries experienced positive growth, 28 saw no growth, and 90 countries experienced a decline in the number of companies providing services to their ports.

**Table 3: Number of liner companies providing services to the country's ports**

Rank 2008	Country or territory	2008	2007	% change 2008/2007
1	Netherlands	106	102	3.9
2	Germany	92	97	-5.2
3	China	88	82	7.3
4	United Kingdom	87	90	-3.3
5	United States	84	82	2.4
6	Singapore	80	84	-4.8
7	Hong Kong, China	70	72	-2.8
8	Korea, Republic of	69	70	-1.4
9	Malaysia	68	72	-5.6
10	Japan	65	62	4.8

### *Liner services*

China leads the liner services category in 2008 as it did in 2007, showing a 5.8% increase from 2007 over 2008. Of the top 10, Malaysia shows the greatest increase in 2008 over 2007 at 13.8%, while the United States shows a decline in 2008 over 2007 of -4.6% (Table 4).

Looking at longer term trends, by July 2008, 67 countries received more liner service than in July 2004, while 9 countries experienced no change and 86 countries recorded a decline in liner services.

**Table 4: Liner services from the country's ports**

Rank 2008	Country or territory	2008	2007	% change 2008/2007
1	China	1,079	1,020	5.8
3	Singapore	736	691	6.5
2	Hong Kong, China	723	691	4.6
10	Korea, Republic of	559	559	0.0
6	United States	538	564	-4.6
9	Malaysia	521	458	13.8
12	Japan	503	520	-3.3
4	Germany	439	448	-2.0
5	Netherlands	423	401	5.5
7	United Kingdom	398	415	-4.1

### *Maximum vessel size*

The largest vessels of 12,058 TEUs served five countries in July 2008: China, Germany, Hong Kong (China), the Netherlands and Spain (Table 5). In July 2008, 115 countries received larger vessels than they did in July 2004, 19 countries experienced no change, and only in 28 countries were the largest vessels calling at their ports smaller in 2008 than in 2004.

**Table 5: Maximum vessel sizes**

Rank 2008	Country or territory	2008	2007	% change 2008/2007
1	China	12,508	12,508	0.0
1	Germany	12,508	12,508	0.0
1	Hong Kong, China	12,508	12,508	0.0
1	Netherlands	12,508	12,508	0.0
1	Spain	12,508	12,508	0.0
6	Belgium	10,062	9,580	5.0
6	Singapore	10,062	9,469	6.3
6	United Kingdom	10,062	9,580	5.0
9	Malaysia	9,661	12,508	-22.8
10	Korea, Republic of	9,580	9,580	0.0

### *Trends during the period 2004 - 2008*

Those countries that were best connected in July 2004 were likely to further improve their connectivity over the subsequent four years; 19 of the 20 best-ranked countries in 2004 are still among the top 20 countries in 2008, with China retaining its lead in the ranking since 2004 (Table 6). When we divide the countries into five quintiles, we find that the top 20% of 2004 increased their LSCI by an average of +6.6 points, the second quintile by +4.4 points, the third quintile by +2.4 points, the fourth quintile by +0.7 points and the last quintile by +0.8 points.

Some countries have experienced exceptional improvements over the past four years, most notably Morocco and Lebanon. In 2004, these medium-ranked countries saw significant improvements in their connectivity (217 per cent and 174 per cent growth of the LSCI respectively). Conversely, the Republic of Yemen experienced one of the strongest declines in the index (-25%), which could be attributed to shipping surcharges on war-risk premiums and the withdrawal of PSA from Aden port in 2003.



As regards the average per country of the five components of the LSCI, the number of ships (+9 per cent), the maximum ship size (+37 per cent) and the total TEU capacity deployed (+38 per cent) have increased since 2004. By comparison, liner services (-3 per cent) and the number of companies as an indicator of competition (-11 per cent) have decreased.

**Table 6: Liner Shipping Connectivity Index (LSCI), 2004-2008**

Country	2008		2007		2006		2005		2004		Change 2008/ 2004
	LSCI	Rank	LSCI	Rank	LSCI	Rank	LSCI	Rank	LSCI	Rank	
China	137.38	1	127.86	1	113.1	1	108.3	1	100	1	37.38
Hong Kong, China	108.78	2	106.21	2	99.31	2	96.78	2	94.42	2	14.36
Singapore	94.47	3	87.53	4	86.11	3	83.87	4	81.87	4	12.6
Germany	89.27	4	88.95	3	80.66	7	78.41	7	76.59	7	12.68
Netherlands	87.57	5	84.79	5	80.97	6	79.95	5	78.81	6	8.76
United States	82.45	6	83.68	6	85.8	4	87.62	3	83.3	3	-0.85
United Kingdom	77.99	7	76.77	9	81.53	5	79.58	6	81.69	5	-3.7
Belgium	77.98	8	73.94	10	76.15	8	74.17	8	73.16	8	4.82
Malaysia	77.6	9	81.59	7	69.2	10	64.97	12	62.83	12	14.77
Korea, Republic of	76.4	10	77.2	8	71.92	9	73.03	9	68.68	10	7.72
Spain	67.67	11	71.26	11	62.29	14	58.16	15	54.44	15	13.23
Japan	66.64	12	62.73	14	64.54	13	66.73	11	69.15	9	-2.51
France	66.24	13	64.84	13	67.78	11	70	10	67.34	11	-1.1
Taiwan Province of China	62.58	14	62.43	15	65.64	12	63.74	13	59.56	13	3.02
Italy	55.88	15	58.84	16	58.11	15	62.2	14	58.13	14	-2.25
Egypt	52.54	16	45.37	18	50.01	16	49.23	16	42.86	16	9.68
United Arab Emirates	48.8	17	48.21	17	46.7	17	39.22	18	38.06	18	10.74
Saudi Arabia	47.44	18	45.04	19	40.66	19	36.24	20	35.83	19	11.61
Sri Lanka	46.08	19	42.43	20	37.31	20	33.36	21	34.68	20	11.4
India	42.18	20	40.47	21	42.9	18	36.88	19	34.14	21	8.04
Australia	38.21	21	26.77	34	26.96	30	28.02	27	26.58	26	11.63
Thailand	36.48	22	35.31	22	33.89	22	31.92	22	31.01	23	5.47
Turkey	35.64	23	32.6	24	27.09	29	27.09	28	25.6	29	10.04
Portugal	34.98	24	25.43	39	23.55	36	16.84	43	17.54	41	17.44
Canada	34.28	25	34.4	23	36.32	21	39.81	17	39.67	17	-5.39
Mexico	31.17	26	30.98	26	29.78	26	25.49	32	25.29	30	5.88
Brazil	30.87	27	31.64	25	31.61	23	31.49	23	25.83	28	5.04
Panama	30.45	28	30.54	28	27.61	28	29.12	24	32.05	22	-1.6
Oman	30.42	29	28.96	32	20.28	42	23.64	35	23.33	31	7.09
Sweden	30.27	30	25.82	36	28.17	27	26.61	29	14.76	48	15.51
Philippines	30.26	31	18.42	49	16.48	49	15.87	45	15.45	45	14.81
Malta	29.93	32	29.53	30	30.32	25	25.7	31	27.53	25	2.4
Morocco	29.79	33	9.02	82	8.54	85	8.68	84	9.39	78	20.4
Lebanon	28.92	34	30.01	29	25.57	34	12.53	62	10.57	67	18.35
South Africa	28.49	35	27.52	33	26.21	31	25.83	30	23.13	32	5.36
Greece	27.14	36	30.71	27	31.29	24	29.07	25	30.22	24	-3.08
Denmark	26.49	37	22.1	43	25.39	35	24.25	34	11.56	64	14.93
Romania	26.35	38	22.47	42	17.61	45	15.37	48	12.02	61	14.33
Argentina	25.7	39	25.63	37	25.58	33	24.95	33	20.09	37	5.61
Indonesia	24.85	40	26.27	35	25.84	32	28.84	26	25.88	27	-1.03
Pakistan	24.61	41	24.77	40	21.82	38	21.49	37	20.18	36	4.43
Ukraine	23.62	42	16.73	56	14.88	56	10.81	68	11.18	65	12.44
Iran (Islamic Republic of)	22.91	43	23.59	41	17.37	47	14.23	53	13.69	52	9.22
Uruguay	22.88	44	21.28	45	16.81	48	16.58	44	16.44	43	6.44
Colombia	21.64	45	29.13	31	20.49	40	19.2	41	18.61	39	3.03
New Zealand	20.48	46	20.6	46	20.71	39	20.58	38	20.88	34	-0.4

	2008		2007		2006		2005		2004		Change
Country	LSCI	Rank	LSCI	Rank	LSCI	Rank	LSCI	Rank	LSCI	Rank	2008/ 2004
Venezuela (Republic Bolivarian of)	20.46	47	20.26	47	18.62	43	19.9	40	18.22	40	2.24
Dominican Republic	20.09	48	19.87	48	15.19	53	13.95	54	12.45	59	7.64
Israel	19.83	49	21.42	44	20.44	41	20.06	39	20.37	35	-0.54
Viet Nam	18.73	50	17.59	51	15.14	54	14.3	52	12.86	55	5.87
Nigeria	18.3	51	13.69	69	13.02	60	12.79	59	12.83	56	5.47
Jamaica	18.23	52	25.5	38	23.02	37	21.99	36	21.32	33	-3.09
Ghana	18.13	53	14.99	62	13.8	59	12.64	61	12.48	58	5.65
Senegal	17.64	54	17.08	54	11.24	67	10.09	78	10.15	72	7.49
Mauritius	17.43	55	17.17	53	11.53	64	12.26	63	13.13	54	4.3
Chile	17.42	56	17.49	52	16.1	52	15.53	47	15.48	44	1.94
Peru	17.38	57	16.9	55	16.33	50	14.95	50	14.79	47	2.59
Côte d'Ivoire	16.93	58	14.98	63	12.98	61	14.52	51	14.39	49	2.54
Jordan	16.37	59	16.46	57	12.98	61	13.42	57	11	66	5.37
Bahamas	16.35	60	16.45	58	16.19	51	15.7	46	17.49	42	-1.14
Slovenia	15.66	61	12.87	70	11.03	70	13.91	55	13.91	51	1.75
Puerto Rico	15.62	62	15.96	59	14.68	57	15.23	49	14.82	46	0.8
Guatemala	15.44	63	15.4	60	18.13	44	13.85	56	12.28	60	3.16
Croatia	15.36	64	12.33	71	10.47	72	12.19	64	8.58	85	6.78
Russian Federation	15.31	65	14.06	67	12.81	63	12.72	60	11.9	62	3.41
Yemen, Rep. of	14.44	66	14.28	65	9.39	75	10.18	76	19.21	38	-4.77
Ecuador	13.17	67	14.3	64	14.17	58	12.92	58	11.84	63	1.33
Trinidad and Tobago	12.88	68	13.72	68	11.18	68	10.61	71	13.18	53	-0.3
Costa Rica	12.78	69	15.34	61	15.08	55	11.12	67	12.59	57	0.19
Syrian Arab Republic	12.72	70	14.21	66	11.29	66	11.84	65	8.54	86	4.18
Togo	12.56	71	10.63	76	11.09	69	10.62	69	10.19	71	2.37
Benin	12.02	72	11.16	73	10.99	71	10.23	75	10.13	73	1.89
Cyprus	11.81	73	18.01	50	17.39	46	18.53	42	14.39	49	-2.58
Congo	11.8	74	9.61	80	9.12	77	9.1	81	8.29	87	3.51
Namibia	11.12	75	8.37	90	8.52	86	6.61	99	6.28	102	4.84
Cameroon	11.05	76	11.65	72	11.41	65	10.62	69	10.46	69	0.59
Kenya	10.95	77	10.85	74	9.3	76	8.98	82	8.59	84	2.36
United Republic of Tanzania	10.46	78	10.58	77	8.71	81	8.59	86	8.1	90	2.36
Djibouti	10.43	79	10.45	78	7.36	95	7.59	91	6.76	98	3.67
Fiji	10.32	80	7.35	97	7.24	97	8.32	87	8.26	88	2.06
Angola	10.22	81	9.9	79	9.46	74	10.46	73	9.67	76	0.55
Finland	9.72	82	10.7	75	8.58	84	10.16	77	9.45	77	0.27
Poland	9.32	83	7.86	95	7.5	94	7.53	92	7.28	92	2.04
Honduras	9.26	84	8.76	85	8.29	88	8.64	85	9.11	80	0.15
New Caledonia	9.23	85	8.82	84	9	78	10.34	74	9.83	75	-0.6
French Polynesia	9.01	86	8.6	87	8.91	79	11.14	66	10.46	69	-1.45
Gabon	8.93	87	8.58	88	8.72	80	8.76	83	8.78	81	0.15
Nicaragua	8.91	88	7.89	94	8.05	91	5.25	116	4.75	122	4.16
Mozambique	8.81	89	7.14	99	6.66	99	6.71	98	6.64	99	2.17
El Salvador	8.67	90	7.9	92	8.07	90	7.32	94	6.3	101	2.37
Guam	8.56	91	8.73	86	9.56	73	10.52	72	10.5	68	-1.94
Netherland Antilles	8.56	91	9.23	81	7.82	92	8.23	89	8.16	89	0.4
Mauritania	7.93	93	7.9	92	6.25	102	5.99	106	5.36	112	2.57
Norway	7.91	94	7.8	96	7.34	96	8.31	88	9.23	79	-1.32

	2008		2007		2006		2005		2004		Change
Country	LSCI	Rank	LSCI	Rank	LSCI	Rank	LSCI	Rank	LSCI	Rank	2008/ 2004
Madagascar	7.82	95	7.97	91	8.31	87	6.83	96	6.9	96	0.92
Lithuania	7.76	96	6.83	101	5.66	105	5.88	108	5.22	115	2.54
Algeria	7.75	97	67	12	8.7	83	9.72	79	10	74	-2.25
Ireland	7.64	98	8.85	83	8.18	89	9.66	80	8.78	81	-1.14
Tunisia	6.95	99	7.23	98	7.04	98	7.62	90	8.76	83	-1.81
Papua New Guinea	6.93	100	6.86	100	4.67	119	6.4	103	6.97	94	-0.04
Samoa	6.66	101	6.5	104	5.09	113	5.33	113	5.44	110	1.22
American Samoa	6.44	102	6.28	106	4.86	115	5.3	115	5.17	117	1.27
Guinea	6.41	103	8.47	89	8.71	81	6.89	95	6.13	104	0.28
Bangladesh	6.4	104	6.36	105	5.29	109	5.07	119	5.2	116	1.2
Saint Kitts and Nevis	6.19	105	6.16	109	5.59	106	5.32	114	5.49	108	0.7
Kuwait	6.14	106	6.22	108	4.14	127	6.77	97	5.87	106	0.27
Cuba	6.12	107	6.71	102	6.43	100	6.51	101	6.78	97	-0.66
Bahrain	5.75	108	5.99	110	4.44	124	4.34	126	5.39	111	0.36
Latvia	5.52	109	5.87	111	5.1	112	5.82	110	6.37	100	-0.85
Estonia	5.48	110	5.78	113	5.76	103	6.52	100	7.05	93	-1.57
Maldives	5.45	111	4.75	121	3.9	130	4.08	130	4.15	126	1.3
Sudan	5.38	112	5.66	114	5.67	104	6.19	104	6.95	95	-1.57
Libyan Arab Jamahiriya	5.36	113	6.59	103	4.71	118	5.17	118	5.25	114	0.11
Barbados	5.36	113	5.79	112	5.34	108	5.77	111	5.47	109	-0.11
Guinea-Bissau	5.34	115	5.12	117	5.03	114	5.19	117	2.12	152	3.22
Comoros	5.15	116	5.51	115	5.39	107	5.84	109	6.07	105	-0.92
Aruba	5.09	117	5.09	118	7.53	93	7.52	93	7.37	91	-2.28
Bulgaria	5.09	117	4.83	120	4.47	122	5.61	112	6.17	103	-1.08
Gambia, The	4.97	119	4.74	122	4.8	116	6.13	105	4.91	118	0.06
Sierra Leone	4.74	120	5.08	119	5.12	111	6.5	102	5.84	107	-1.1
Iceland	4.72	121	4.72	123	4.75	117	4.88	121	4.72	123	0
Saint Vincent and Grenadines	4.52	122	4.34	126	3.4	135	3.58	135	3.56	134	0.96
Seychelles	4.49	123	5.29	116	5.27	110	4.93	120	4.88	120	-0.39
Vanuatu	4.36	124	4.34	126	4.41	126	4.48	123	3.92	128	0.44
Guyana	4.36	124	4.26	129	4.6	120	4.37	125	4.54	124	-0.18
Suriname	4.26	126	4.29	128	3.9	130	4.16	129	4.77	121	-0.51
Liberia	4.25	127	4.5	124	4.55	121	5.95	107	5.29	113	-1.04
Saint Lucia	4.25	127	4.21	130	3.43	134	3.72	133	3.7	132	0.55
Tonga	4.23	129	4.07	133	4.45	123	4.75	122	3.81	131	0.42
Faeroe Islands	4.2	130	4.45	125	4.43	125	4.4	124	4.22	125	-0.02
Grenada	4.2	130	4.09	132	3.37	136	2.52	147	2.3	149	1.9
Solomon Islands	4.16	132	4.13	131	3.97	129	4.29	127	3.62	133	0.54
Georgia	4.03	133	3.22	141	2.94	143	3.81	132	3.46	137	0.57
Equatorial Guinea	3.86	134	3.36	138	3.76	133	3.87	131	4.04	127	-0.18
Micronesia (Federated States of)	3.85	135	3.13	142	1.94	155	2.87	144	2.8	144	1.05
Antigua and Barbuda	3.82	136	3.76	134	2.43	150	2.56	146	2.33	146	1.49
US Virgin Islands	3.81	137	3.76	134	3.22	139	3	142	1.77	155	2.04
Palau	3.79	138	3.07	144	1.87	156	1.04	159	1.04	158	2.75
Northern Mariana Islands	3.76	139	2.86	150	1.85	157	2.2	153	2.17	151	1.59
Brunei Darussalam	3.68	140	3.7	136	3.26	137	3.46	136	3.91	129	-0.23
Myanmar	3.63	141	3.12	143	2.54	149	2.47	149	3.12	139	0.51
Cape Verde	3.63	141	2.45	154	2.76	146	2.28	151	1.9	153	1.73

Country	2008		2007		2006		2005		2004		Change 2008/ 2004
	LSCI	Rank	LSCI	Rank	LSCI	Rank	LSCI	Rank	LSCI	Rank	
Cambodia	3.47	143	3.25	140	2.93	144	3.25	140	3.89	130	-0.42
Haiti	3.44	144	2.87	149	2.91	145	3.43	137	4.91	118	-1.47
Democratic Republic of Congo	3.36	145	2.68	151	2.66	147	3.03	141	3.05	142	0.31
Eritrea	3.26	146			2.23	154	1.58	155	3.36	138	-0.1
Somalia	3.24	147	3.05	147	2.43	150	1.28	157	3.09	140	0.15
Qatar	3.21	148	3.59	137	3.9	130	4.23	128	2.64	145	0.57
Montenegro	3.2	149	2.96	148	2.96	142	2.92	143	2.92	143	0.28
Czech Republic	3.2	149	0.44	161	0.44	161	0.44	161	0.44	161	2.76
Kiribati	3.06	151	3.06	145	3.05	141	3.28	139	3.06	141	0
Marshall Islands	3.06	151	3.06	145	3.26	137	3.68	134	3.49	136	-0.43
Switzerland	3.01	153	3.27	139	3.2	140	3.4	138	3.53	135	-0.52
Sao Tome and Principe	2.54	154	1.62	159	1.57	159	1.28	157	0.91	159	1.63
Belize	2.32	155	2.61	152	2.62	148	2.59	145	2.19	150	0.13
Dominica	2.31	156	2.4	155	2.33	152	2.51	148	2.33	146	-0.02
Greenland	2.27	157	2.27	157	2.27	153	2.32	150	2.32	148	-0.05
Albania	1.98	158	2.28	156	0.4	162	0.4	162	0.4	162	1.58
Tuvalu	1.82	159									1.82
Cayman Islands	1.78	160	1.78	158	1.79	158	2.23	152	1.9	153	-0.12
Bermuda	1.57	161	1.57	160	1.57	159	1.57	156	1.54	156	0.03
Iraq	1.2	162	2.61	152	4.06	128	1.63	154	1.4	157	-0.2
Paraguay	0.65	163	6.23	107	6.32	101	0.53	160	0.53	160	0.12

Source: UNCTAD, based on data provided by Containerisation International.

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## National Workshops on Multimodal Transport in the Economic Cooperation Organization (ECO) Region

Successful National Workshops on Multimodal Transport in the Economic Cooperation Organization (ECO) Region were held with national institutional commitments. Bearing in mind the potential efficiency gains that can accrue to Member States of the ECO region from the introduction of multimodal transport and from the implementation of trade and transport facilitation initiatives aiming at regional trade expansion, ECO, UNCTAD and UNESCAP, with financial support of the Islamic Development Bank (IsDB), are implementing a joint project in the field of multimodal transport and trade facilitation in the ECO region. The overall objective of the project is to assist ECO member countries in laying a sound basis for multimodal transport and trade facilitation operations in the region.

To achieve this overall objective, a number of immediate objectives and activities in two phases were identified for implementation. The first phase of the project on trade facilitation included national diagnostic studies focussing on this important issue carried out by national consultants of ECO member States. During the second phase, a number of national diagnostic studies focussing on the national experiences of transport sector were carried out, the outcome of which was reflected in a region-wide study.

Upon the completion of the second phase of the joint project, an inter-Agency meeting with the participation of IsDB, ECO and UNCTAD was held in June 2008 in Tehran. It was decided to hold national multimodal transport workshops. The objective of organizing the national workshops was to familiarize key stakeholders in each of the ECO Member States with concepts and benefits of multimodal transport, its influences on carrier liability, and standard qualifications required for operators; analyse obstacles to multimodal transport and national strategies to promote multimodal transport; elaborate a set of concrete recommendations; and outline investment proposals.



So far, national workshops have been held in Tehran, Iran (July 2008); Kabul, Afghanistan (August 2008); Astana, Kazakhstan (August 2008); Baku, Azerbaijan (September 2008) and in Bishkek, Kyrgyzstan (October 2008).

A strong presence of the private sector has been an outstanding feature of these national workshops. Given the important role of multimodal transport operators in the development of multimodal transport, the region may work out new tools and activities for continued capacity-building and empowerment of the freight forwarding industry in the region.

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## The ASYCUDA Single Window for International Trade

Building on its long experience in customs modernization and automation, UNCTAD has begun work on the development of the ASYCUDA Single Window (SW) System.<sup>5</sup> The System will link customs, other government agencies (OGAs) and the business community in an interactive network that provides a single entry point for the submission and processing of all import, export and transit-related documents and data. The development and implementation of the System involve simplifying trade procedures and processes, standardizing data and documents, and connecting all the participants in the international trade transaction.

Countries that already have installed ASYCUDA are in a good position for SW implementation, as some of the core prerequisites, such as document standardization and process simplification, have already been undertaken. Countries new to ASYCUDA will find a comprehensive approach based on proven methodologies and work practices.

The ASYCUDA SW System will provide direct benefits to traders through more efficient and transparent operations at the border, greater predictability, reduced costs, and faster goods clearance time. Governments will also benefit through increased cooperation between various agencies, with an associated increase in the efficiency of controls and the productivity of services, and enhanced revenue through more uniform and consistent application of rules.

### *Key components of the ASYCUDA Single Window System development strategy*

In establishing a single window for trade, the simple electronic connection of different services is not sufficient for allowing the integrated processing of trade operations. Rather, ASYCUDA will take a systematic approach to the analysis and simplification of existing process and the development of harmonized and integrated procedures. The ASYCUDA SW System will be concerned in particular with the exchange of information between customs and other government agencies (OGAs) and private sector operators. It will include functions such as pre-lodgement of the manifest and declaration, enabling government users to select and hold specific consignments identified from the manifest to ensure that they are brought to their attention.

The use of risk analysis will be extended to all agencies, allowing them to employ their own selection criteria in order to select relevant transactions so that appropriate control measures may be applied to the goods. It will be possible to transact electronic payment on the system, thereby facilitating the simultaneous application of controls by all border agencies (single inspection). The system will ensure that release of the goods is only allowed once all agency requirements have been satisfied. Simplified procedures will be designed and proposed for selected and compliant trade and/or transport operators (authorized economic operators or AEOs).

By definition, the SW concept requires the transfer of data between different entities and different computer systems. The ASYCUDA SW System will address this need by defining standard documents and messages for interfacing between the various systems, a key element for SW implementation.

In view of the broad range of activities and the large variety of personnel involved in SW System implementation and operation, ASYCUDA will provide a comprehensive and multifaceted training programme for system operators and end users. This will take into account technical, administrative and legal aspects as well as professional functionality and will include data exchange concepts and system management, from both a technical and functional perspective.

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<sup>5</sup> A Single Window is a facility that allows parties involved in trade and transport to lodge standardized information and documents with a single entry point to fulfil all import, export, and transit-related regulatory requirements. If information is electronic, then individual data elements should only be submitted once - UNECE UN/CEFACT Recommendation 33: [http://www.unece.org/cefact/recommendations/rec33/rec33\\_trd352e.pdf](http://www.unece.org/cefact/recommendations/rec33/rec33_trd352e.pdf)

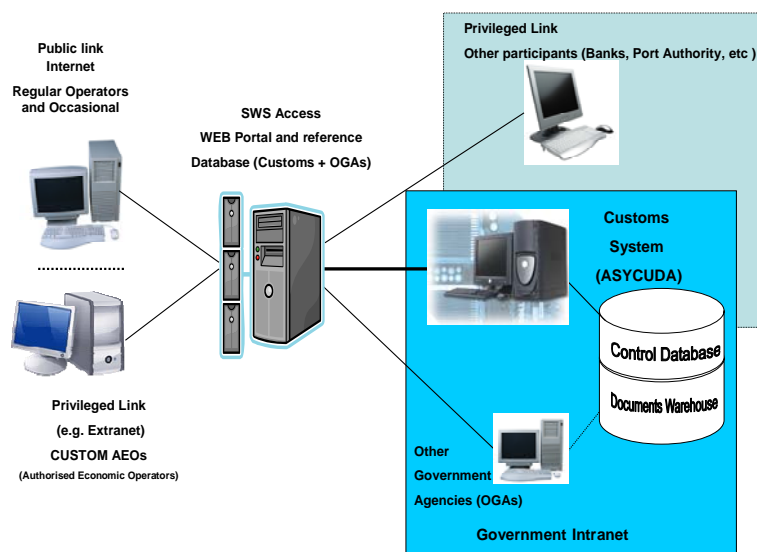


ASYCUDA will provide for a phased approach to SW implementation in order to assist countries in gradually moving towards a full paperless solution, as conditions allow. The aim is not to force system implementation but to prepare the conditions for a gradual and successful implementation of the new concept.

*Technical features of the ASYCUDA Single Window System*

Implementing the ASYCUDA SW System requires the establishment of a framework for binding the various customs and OGA systems together to produce a system of interoperability. This does not mean developing a single system to automate all of the diverse procedures and systems of each of the participants but rather linking existing systems. Moreover, because ASYCUDA functions use Internationally Standardized Data and messages (UNTDDED (ISO) data and EDIFACT or XML messages), the interoperability of the system can be extended across international borders to include similar systems located in other countries.

**The ASYCUDA Single Window Portal**



Under such an interoperable environment all of the different contributory systems, which normally operate individually within their own roles, will work together to achieve unified clearance of the goods. This will be possible through the ASYCUDA SW Web portal, which will manage user access to the SW System environment (including a Single Sign On) and provide for data transfer between administrative and external participants. The portal will also give registered and public users direct access to an integrated database of regulations and required documentation concerning both customs and OGA data. Intra-agency data transfer and common processing will be managed within a secured specific environment, such as a government Intranet.

*A more detailed description of the ASYCUDA Single Window is available under [www.asycuda.org](http://www.asycuda.org). Tom Butterly and Bruno Favaro, [bruno.favaro@unctad.org](mailto:bruno.favaro@unctad.org), Trade Logistics Branch, UNCTAD*

## **ICC Committee on Maritime Transport**

In 2005, the International Chamber of Commerce (ICC) approved a policy statement on “The need for investment in port and freight transportation infrastructure.” Below, we reproduce excerpts from the 2008 update by ICC.

“Port congestion and insufficient freight transport infrastructure is an international problem that affects every aspect of the global supply chain. The pace of international trade has expanded rapidly, and ports and their surrounding regions simply cannot handle the increasing cargo volumes.”

“All types of shipping are affected by inadequate infrastructure. Cargo should move cleanly and quickly from ship to rail or truck. However, if just one aspect of the intermodal network breaks down, massive inefficiency and delays throughout the chain can occur. Port congestion could be caused by blocked roads, congested waterways or railways, inadequate water depths or even low productivity in some countries.”

“One estimate put the annual cost of congestion in the United States alone in the range of US\$20 billion. Congestion at Australian ports is seen as a contributing factor in driving the prices of dry bulk commodities, such as coal or grain, to record-high levels. China cut its 2007 coal imports from Australia by 34 per cent as insufficient rail and port handling facilities restricted shipments. Time is money. To combat congestion, improvement in freight transportation infrastructure is necessary. This includes the expansion of port waterways and terminals, including more berths for ocean vessels, barges and feeder ships, and also the expansion or upgrading efficiency of railways and the highways running inland.”

“To cope with the surge in freight traffic, action is required now. Owners and operators of ports and terminals should study methods to increase efficiency, and should invest accordingly. Public authorities at the local, regional and national level should act to ensure that the necessary planning and investment tools are available, and that development plans are based on commercially oriented frameworks, offering genuine competition within port areas to create the highest possible efficiency.”

“Public-private partnerships should be considered as possible sources of funding.

Carriers, freight forwarders and shippers should work together to improve the forecasting of cargo volumes and should exchange information to help reduce bottlenecks and to improve decision-making.”

The complete policy statement can be downloaded via <http://www.iccwbo.org>

## **Transport Prices and Costs in Africa**

World Bank, ISBN: 0-8213-7650-0

Transport prices for most African landlocked countries range from 15 to 20 per cent of import costs. This is approximately two to three times more than in most developed countries. It is well known that weak infrastructure can account for poor trade performance. Thus, it becomes necessary to understand what types of regional transport services operate in landlocked African nations and it is critical to identify the regulation disparities and provision anomalies that hurt infrastructure efficiency, even when the physical infrastructure, such as a road transport corridor, exists.

Transport Prices and Costs in Africa analyses the various reasons for poor transport performance seen widely throughout Africa and provides a compelling case for a number of national and regional reforms that are vital to efforts to address the underlying causes of high transport prices and costs and service unpredictability seen in Africa. The book will greatly help supervisory authorities throughout the region develop and implement a comprehensive transport policy that will facilitate long-term growth.

[www.worldbank.org](http://www.worldbank.org)

## **Maritime Disasters Workshop**

Presentations are now online from the event “*Maritime Disaster Workshop: Response to and Recovery from Channel Closures at the Ports of Los Angeles and Long Beach*”, held on 4-5 September 2008 in California. The workshop focused on a scenario involving an incident that shuts down the Ports of Los Angeles and Long Beach

<http://www.trb.org/marineboard/Salvage08/presentations.pdf>

## SITPRO's Research on the Cost of Paper in the Supply Chain

This summer 2008, SITPRO has published the findings of its research on the cost of paper documents in the perishable foods supply chain. The research, called "Project Hermes", revealed that current documentary systems cost the perishables supply chain more than £1 billion annually. As the research considered the use of paper in the whole international supply chain from suppliers in the third countries to UK retailers, it revealed that potential savings of over £700 million could be made by implementing straight-through processing (STP).

STP refers to the transfer of data by electronic message through all the parties in the supply chain, including importers, exporters and authorities. Open international standards for data and messaging (such as UN/CEFACT's UNEDocs project and the UK implementation, UNEDocsUK) are a vital step towards providing this interoperability.

*Copies of the research are available from SITPRO or may be downloaded from [www.sitpro.org.uk/reports/hermes.pdf](http://www.sitpro.org.uk/reports/hermes.pdf)*

## Single Euro Payment Area (SEPA) and Electronic Invoicing e-invoicing

The Single Euro Payments Area (SEPA) is an initiative of the European banking industry that will make all electronic payments across the Euro area – e.g. by credit card, debit card, bank transfer or direct debit – as easy as domestic payments within one country are now. The SEPA project is strongly supported by the European Commission and the European Central Bank. The Payment Services Directive provides the necessary legal framework for SEPA, as well as for better payments in all EU countries. The first SEPA products have been made available since 1 January 2008. Ultimately, SEPA is expected to become a reality for everyone by the end of 2010.

To ensure the pervasive realization of SEPA, EU has also started working on the establishment of EU's electronic invoicing – e-invoicing, i.e. the electronic transfer of invoicing information (billing and payment) between business partners (supplier and buyer). E-invoicing is viewed as an essential part of an efficient financial supply chain as it links the internal processes of enterprises to

the payment systems. As most large enterprises in the EU region have made good progress with Electronic Data Interchange (EDI) and towards the automation of their own supply chains, part of the key work is to ensure that the benefits of such automation of the complete supply chain could also be felt and harnessed by small and medium-sized enterprises as well as public sector organizations.

As a result of a Commission Decision in October 2007, following the report of an Interim Task Force on e-invoicing, the European Commission has set up an Expert Group on e-invoicing with a brief to identify business requirements and responsibilities for the execution of specific work, as well as to steer the creation — by the end of 2009 — of a European e-invoicing framework aimed at establishing a common conceptual structure to support the provision of e-invoicing services in an open and interoperable manner across Europe.

*The latest report of the progress made by the Group may be downloaded from*

*[http://ec.europa.eu/enterprise/ict/policy/einvoicing/einvoicing\\_status\\_report\\_final.pdf](http://ec.europa.eu/enterprise/ict/policy/einvoicing/einvoicing_status_report_final.pdf)*

## Containerized Reefer Trades

Historically, the refrigerated cargo trade has been split roughly equally between container lines and specialized reefer ships. The former can offer regular scheduled services and the convenience of containerized transport. However, operators of dedicated reefer tonnage are best-placed to cope with the huge peaks as crops are harvested in the Southern Hemisphere and shipped north in the space of a few weeks.

Today, the global reefer trades are less easily defined. Container lines aim at expanding into new business. Several container shipping lines, including Hamburg Süd and Maersk, are investing in containerships that can carry far more chilled and frozen produce than conventional tonnage. These modern ships will also be more fuel-efficient than many of the older reeferships.

The problem for the specialists is the lack of investment in new tonnage. Very little new shipbuilding is in the pipeline. Denmark's J. Lauritzen, a reefership pioneer, decided last year that it would become impossible to compete against the container lines and pulled out of the business.

*Source: Lloyds List, 21 August*

## **UNCITRAL's Work on the Single Window**

The United Nations Commission on International Trade Law (UNCITRAL), at its forty-first session in New York, 16 June–3 July 2008, published a document on “Possible future work on electronic commerce: Legal issues arising out of the implementation and operation of single windows in international trade”. UNCITRAL has been invited to participate in a joint project with the World Customs Organization aimed at formulating a comprehensive guidance document to which legislators, government policymakers, Single Window implementers and other stakeholders involved in international transactions could refer for advice on the legal aspects of creating and managing a Single Window environment. UNCITRAL document A/CN.9/655 sets out

policy considerations and legal issues in the implementation and operation of Single Windows and submits proposals for possible future work in cooperation with other international organizations.

<http://daccessdds.un.org/doc/UNDOC/GEN/V08/529/14/PDF/V0852914.pdf>

## **New Contracting Party to the International Maritime Conventions adopted under the auspices of UNCTAD**

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

Entry into force: 01 November 1992;  
Contracting States: 34

Kazakhstan - 18 June 2008 (a)

*For more information on the latest status of this and other Conventions, please visit [www.unctad.org/ttl/legal](http://www.unctad.org/ttl/legal)*

