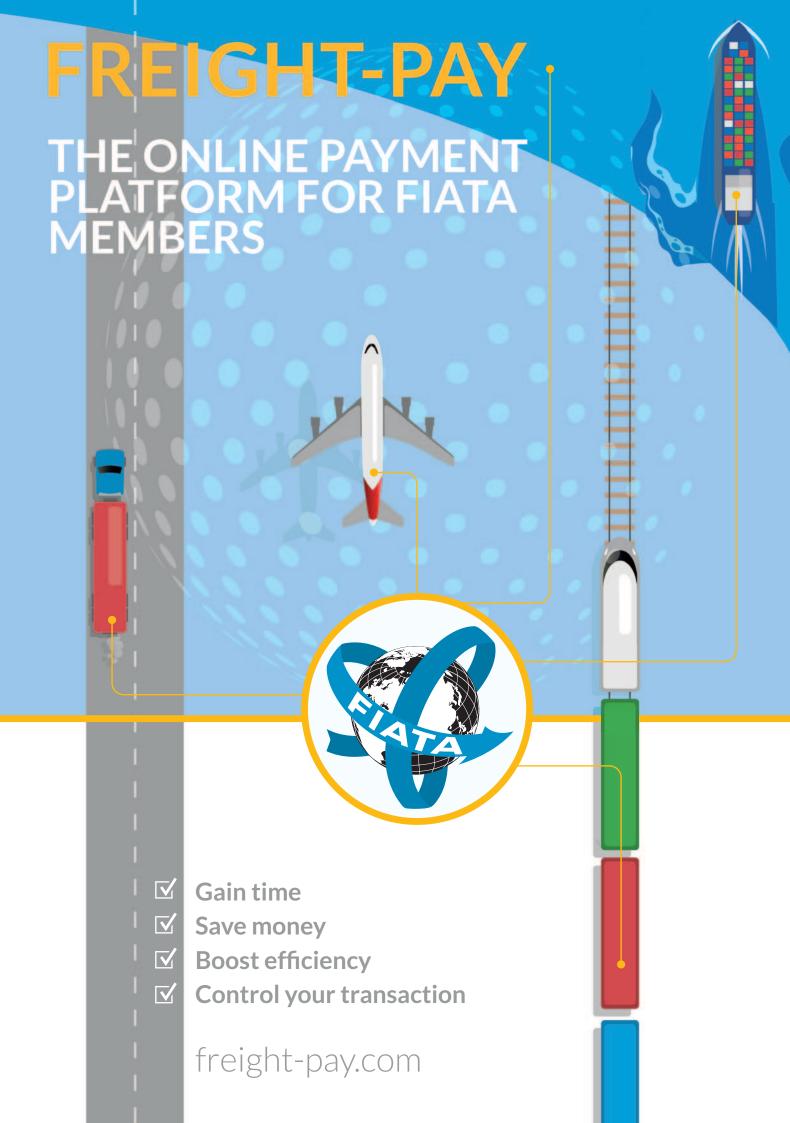


MAGAZINE OF THE INTERNATIONAL FEDERATION OF FREIGHT FORWARDERS ASSOCIATIONS





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MARITIME CRISIS SPECIAL

Ruptured supply chains, a permanent feature of global trade for 18 months now, look set to continue. Competition in the maritime sector is not fair for freight forwarders today, though they are very important players in the segment. FIATA has dedicated a special focus to these issues, due to their great urgency. Learn from the experts' advice and read about the Federation's efforts to overcome the situation.

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MASTHEAD

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FIATA Review

FIATA's quarterly magazine presents a global outlook on freight forwarding and logistics, as well as the latest news from FIATA's secretariat and its members.

ATAI

Also known as the 'Architects of Transport', FIATA International Federation of Freight Forwarders Associations is a non-governmental, membership-based organisation representing the freight forwarding industry in some 150 countries.



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COMING TOGETHER AGAIN

Dear colleagues and friends,

As this editorial is finalised, the world faces a new challenge, with all the consequences that a new armed conflict at Europe's eastern gateway will have on our economies and supply chains. No one knows where this conflict will lead us, but FIATA's thoughts are with the civilian victims and their families and with our members in the affected regions.

On a more positive note, this issue of the FIATA Review brings the expectation that we will soon, after a long break, be able to meet in person again at the various events planned this year. The COVID-19 recovery period holds hope of a return to normality for the industry that unites us. The 2022 FIATA HQ Meeting in Geneva, Switzerland, 17-20 May, will pave the way for this year's FWC in Busan, South Korea, in September, where we hope to see many of you. The HQ Meeting will be hosted in Geneva, the capital of international organisations, for the first time since FIATA's move from Zurich. It will be an opportune chance for us to meet in person to discuss the way forward in alliances, regional groups and institutes, and this with our part-



ner organisations, including WTO, ICT, UNCTAD, UNECE, IATA, IRU and many others.

With the maritime crisis still looming amongst us, many of our members face difficult times. As an international Federation that always strives to be there for its members, we would like to cast a positive light on the way forward. The importance of being part of a federation such as FIATA has never been more pressing, particularly with the increasing pressures on the industry to adapt to new sustainability goals, digitalisation and increased transparency.

The digitalisation of the FIATA electronic Negotiable Multimodal Transport Bill of Lading (eFBL) will allow ease of trade for our industry. In this issue we will be able to disclose more information on its use by our members. The eFBL, which we envisage becoming an industry standard, would contribute to FIATA's goals of uniting and protecting the freight forwarding industry worldwide and standardising and increasing the efficiency of the industry's services by providing uniform forwarding documents.

On top of its endeavours for the process of digitalisation, FIATA is also continually improving its methods of supporting its members, including the use of knowledge-sharing and collaboration. This was demonstrated by the signing of an MoU and creating the Future International Trade Alliance (FIT Alliance), a collaboration with the DCSA, SWIFT, BIMCO and the ICC. This alliance is an excellent opportunity for FIATA to join an awareness-raising campaign on the importance of interoperable data standards and common legislative conditions across international jurisdictions and platforms, and facilitate the acceptance and adoption of an eFBL.

I wish you a successful and productive year, and hope to see many familiar and new faces at the forthcoming FIATA events this year.

Sincerely, Dr Ivan Petrov **FIATA President**

INTERVIEW

Jens Roemer, a new FIATA Senior Vice President, addresses the maritime crisis head on in this informative update, sharing perspectives on the global picture and how FIATA as a Federation and a membership organisation can act.

Responding to threats that can undermine the supply chain

As the Chair of FIATA's Working Group Sea Transport, could you update us on the current maritime situation?

Jens Roemer: The maritime supply chain remains disrupted after the outbreak of the COVID-19 pandemic. There's no planning certainty and the pressure on human resources having to operate in this environment is extreme. It isn't digitalisation or platforms that keep containers moving, it's our well-educated teams – our human resources, who carry each container on and off board, as other modes of transport are often cancelled or rescheduled several times. Our industry is known for coming to the rescue of global supply chains.

The local offices of shipping lines are often considerably overloaded and, in many instances, disregard their obligations and disrespect their responsibility out of the contract of carriage. The fact that our industry often refers to terminal operators rather than to the owner of the service for more reliable information related to vessel schedules says it all. Whilst there's hope that the situation may gradually improve throughout the course of this year, there are also serious challenges such as the zerotolerance policy of China, and labour negotiations on the US West Coast.

Another development is the vertical integration of shipping lines in the maritime supply chain, using the landslide profits generated on account of disruptions during the pandemic.

Hamburg Süd's announcement that it is changing its policy in dealing with the freight forwarding industry has received

quite some attention. But it isn't only Hamburg Süd, other shipping lines also have questionable policies towards our industry. This development is considerable if you consider that, with our combined volumes, our industry is possibly the biggest customer of shipping lines. We often act as filters, and advise shippers who lack the know-how of all of the maritime regulations and processes. This may pertain to the correct calculation or reporting of the Verified Gross Mass, consulting with regard to loading and securing goods inside a container, hazardous cargo regulations - freight forwarders are the closest to the customer and contribute to safe maritime transport. Taking out this filter isn't in anybody's interest, and would expose maritime transport even more.

I sometimes wonder what other stakeholders think about our industry in the maritime supply chain. We aren't just the



FIATA SVP Jens Roemer wants competition with carriers to be on a level playing field.

middleman, we also add substantial value with our service offerings.

What is FIATA's role in response to this state of affairs?

JR: We operate in free market economies, and it's a commercial decision of shipping lines to integrate vertically – some have tried many times, to the regret of their own shareholders. Our services definitely add substantial value to the maritime supply chain, and competition is good for any given market. So I have no concerns about that.

However, FIATA has long been arguing that competition with shipping lines is not on a level playing field, supporting the position of CLECAT, the European association. Through mergers and acquisitions, there are only a few major lines left, which are organised in only three major alliances, allowing them market protection that our industry doesn't have when competing with them. Clearly we are dealing with an oligopoly, and we can all see the consequences such market dominance of one stakeholder has.

It is FIATA's role to continue to create global awareness of unfair and unjust practices around the world, to make sure that our industry can compete with shipping lines on a level playing field. The best example is FIATA's highly recognised 'Tool Kit' on the 'FMC final rule on demurrage and detention'. There's also our 'Best Practice documentation' on other issues affecting trade. The maritime crisis has the full attention of the Presidency, and there's more to come, as we are busy analysing various angles.

RECORD DISRUPTION CONTINUES

THE MARITIME SUPPLY CHAIN NEEDS SOLUTIONS NOW

The profound impact of the pandemic on the economic cycle turned into a number of ongoing challenges for logistics. The situation calls for the issues to be addressed in a democratic manner by all of the stakeholders in the supply chain.

The maritime supply chain continues to see record disruption, unpredictability and sky-high freight rates. As also witnessed at FIATA's high-level expert panel at the end of 2021, all stakeholders agree that the situation cannot be attributed to just one cause alone. The pandemic had a profound impact on the economic cycle, bringing with it a multitude of challenges for logistics. Meanwhile, infrastructural deficiencies have been apparent, as hinterland transport has struggled to clear severe port congestion.

Despite being key to finding solutions in the supply chain across all modes of transport, freight forwarders have been faced with moves by certain shipping line carriers to cut or restrict their access to services, in turn contributing to the crisis and impacting those stakeholders that make up the very fabric of the global economy.

As the crisis rages on, it has become increasingly evident that this is an issue far

more pervasive and with far greater bearing not just on the logistics industry, but on the global economy. In particular, it is expected to have a profound impact on developing countries, which rely heavily on access to the maritime supply chain, and also on small and medium-sized enterprises, which form the backbone of these countries' economies.

Consumers are expected to be hardest hit, with consumer price levels expected to rise by 1.5 percentage points (7.5 percentage points in small island developing states), according to UNCTAD.

A dominated field

Wider structural issues have been spurred on in the context of the pandemic, coupled with rapid economic and market developments that outpaced regulation and infrastructure. Just three shipping alliances already dominate circa 80% of the global shipping market and 95% of the critical east-west trade lanes. They continue to expand their services far outside their port-to-port activities, demonstrating crucial imbalances that currently hinder, rather than facilitate, much-needed solutions.

In the world of big data, technological advances threaten to accelerate this, making it crucial that such issues are addressed in a democratic manner by all of the stakeholders in the supply chain.

Addressing issues globally

FIATA welcomes the multifaceted efforts made by certain governments to conduct inquiries into the market, and calls on its national Association Members around the world to continue to encourage their governments to follow suit. FIATA continues to work actively at the global level to address these issues, through its recently-established global maritime task force.



FOR MUTUALLY BENEFICIAL RELATIONSHIPS WITH CARRIERS INSIGHTS FROM PRACTITIONERS

FIATA Working Group Sea Transport practitioners Charles Liang, Neil Taylor and Marc Bibeau bring in their expertise, sharing views and information on the maritime crisis from their working perspectives. One message is clear – the strength of three alliances running more than 80% of shipping capacity is harming small and medium-sized carriers.



Charles Liang, WG Sea Transport, does not expect a rapid return to normal in ocean shipping.



Neil Taylor, FIATA VP and WG Sea Transport, wants governments to investigate carefully.



Marc Bibeau, WG Sea Transport, wants to see good relations between partners.

Charles Liang, of the FIATA Working Group Sea Transport, talks about the maritime crisis in Asia.

Over the past two years we've had good export growth from Asia. But like others worldwide, we've experienced supply chain disruption. Skyrocketing ocean rates have risen more than ten-fold, a situation never seen before.

Carriers' services become unreliable, with occasional blank sailings and much longer transit times. With empty containers often in short supply, we sometimes need to pay additional charges to get one released. Carriers reluctantly provide equipment in the hinterland. To contain the pandemic, ports and other logistics facilities are occasionally locked down.

Looking forward, we expect moderate market growth in 2022 in Asia. Shipping activities aren't likely to return to normal in the near future. We may need to survive the pandemic as well as the volatility of the global supply chain.

Neil Taylor, FIATA VP, of the FIATA WG Sea Transport and ALOG Chile, shares some important updates about the maritime crisis as a practitioner.

The evolution of shipping line concentration shows that, from six alliances with a dominating 63% share of the market a decade ago, by 2020 three alliances controlled 84.2% of capacities. They are also blocking small and medium-sized shippers, by restricting services on certain routes, such as the one between Chile and Peru. Instead of transit times of 14 days between Chile and the US east coast, today it takes approximately 32 to 38 days, with two or three transhipments.

We believe the alliances should be stopped and that governments should investigate very carefully, knowing that alliances can cause a country to collapse. Developing countries depend on their functioning economies and exports. We need to alert our audience and governments to what's happening in detail.

Marc Bibeau shares his opinions as a practitioner and as a member of the FIATA Working Group Sea Transport.

Freight forwarders need to be well versed in the root causes of the maritime crisis. To succeed in this environment, it is important to be solution-oriented and to work on rebuilding partnerships with the ocean carriers. We all know the challenges faced globally – some are legitimate, but some are being used as an excuse to reap extraordinary profits.

More concerning to the future of our industry is that more and more carriers are unwilling to do business with freight forwarders. Despite the challenges faced by the carriers, they act selectively, in some cases unfairly. In the best interest of the end customers, I invite ocean carriers to work with freight forwarders for a mutually beneficial relationship. Our industry has worked collaboratively for decades. It's in the carriers' best interest to keep good relations with freight forwarders.

INITIAL INVESTIGATIONS LAUNCHED

CALLING ON THE AUTHORITIES

FIATA hears from its associations and institutes in this overview, provided by Richard Glück of TIA, Nicolette van der Jagt of CLECAT, and Andrea Tang from FIATA Headquarters. The former bring regional viewpoints to the table, whilst the latter summarises the antitrust aspect of the current maritime crisis.



Richard Glück, TIA, USA, FIATA Vice President

The USA paves the way forward, with competition regulators investigating carriers and ports.

The Bureau of Enforcement of the USA's Federal Maritime Commission is auditing compliance by carriers and ports with its new detention and demurrage rules, strongly supported by FIATA. They protect shippers and forwarders from excessive charges due to port congestion conditions outside their control.

The USA's Department of Justice and the FBI, in cooperation with regulators hailing from Canada, the UK, Australia and New Zealand – the 'five eyes' – have begun an investigation into the causes of skyrocketing ocean shipping rates charged by members of the three ocean carrier consortia, which control 90% of US container trade.

Meanwhile, the US Congress is considering new laws that will punish shipping lines that discriminate against US importers and exporters when supplying space as well as containers.



Andrea Tang, FIATA Headquarters

Andrea Tang, International Trade Lawyer at the FIATA Head Office, shares her take on the reality of antitrust issues in the maritime crisis.

The recent 'five eyes' announcement highlighted the slow responses of other regulators around the world to investigate, as global concerns continue regarding the anticompetitive conduct of shipping lines in their deployment of unfair and discriminatory practices. Recent practices to effectively disintermediate freight forwarders from the logistics supply chain have demonstrated an unfair market playing field.

Technological advances in data-sharing arrangements threaten to exacerbate this. FIATA, as the global voice of the logistics industry, continues to work on empowering its members to conduct the necessary dialogues in their national contexts. Meanwhile, FIATA continues to work with all stakeholders in the supply chain to foster a crucial industry dialogue and the democratisation of processes.



Nicolette van der Jagt, Director General CLECAT

Nicolette van der Jagt, Director General of CLECAT, talks about Europe's forwarding issues on the maritime front.

CLECAT has called on the European Commission to put the container shipping market under close scrutiny, as the industry enters the third year of the Consortia Block Exemption Regulations (CBER), exempting it from normal competition rules. In light of global alliances' new vertical integration strategy, the Commission must urgently take the necessary steps to initiate a sectoral inquiry, so that it can use the results in its forthcoming review of the CBER. While regulatory authorities from around the world are active (USA, Canada, UK, New Zealand, Australia, for example), only the EU has remained silent. Yet four of the biggest shipping lines in the world fall in its jurisdiction. CLECAT has thus called for:

(1) a timely review of the CBER; and (2) clear limits on the exchange of information between carriers, in particular in view of the leakage of this information into carriers' forwarding functions.

A MARK OF INTEGRITY

It was a major achievement for FIATA when it developed the FIATA Multimodal Transport Bill of Lading (FBL) in 1968. FIATA Association Members nevertheless have to comply with a number of rules when distributing an FBL for issuance by its members.



The FBL document also complies with UNCTAD's and the ICC's rules.

Part of FIATA's extensive services to its members include licensing and distributing FIATA transport documents. The most notable of these is the FIATA Negotiable Multimodal Transport Bill of Lading (FBL), which was developed in 1968, when FIATA commenced with the preparation of a standard bill of lading, to enable freight forwarders to meet the needs of trade finance alongside the transport of goods. Whilst traditionally involving a sea-leg portion of a journey, the FBL can be used for any multimodal or unimodal transport.

The FBL is a carrier-type transport document for use by freight forwarders acting as Multimodal Transport Operators (MTO) – it is the freight forwarder who issues the FBL

and is named on the face of it, and who assumes liability for the performance of the multimodal transport contract as a carrier. The document bears the logo of the International Chamber of Commerce (ICC), demonstrating that the FBL complies with the 'UNCTAD/ICC Rules for Multimodal Transport Documents' (ICC Publication 481), the rules developed by the United Nations Commission on Trade and Development (UNCTAD) and the ICC.

A tool that has to be licensed

What are the key benefits of using the FBL? Aside from its negotiability, the FBL provides a degree of uniformity and harmonisation, due to its standard terms and

conditions of carriage, which establish a reasonable level of uniformity. In addition, use of the document is a mark of integrity and traceability, due to FIATA compliance and audit requirements for the distribution and issuing of the document.

Like all other FIATA transport documents, the FBL can only be distributed by FIATA National Association Members specifically licensed to do so; except where there is no licensed National Association Member in a territory, in which case FIATA may distribute the FBL directly to a FIATA Individual Member. FIATA National Association Members, when concluding a distribution agreement with FIATA, must agree to ensure a number of compliance requirements are in place when distributing an FBL for issuance by its members. Such requirements include ensuring the:

- Establishment of the freight forwarder in accordance with local legislation and valid membership with the FIATA National Association Member.
- Possession of the relevant liability coverage by the freight forwarder as carrier, in accordance with the liability provisions contained in the FBL's terms and conditions.
- Maintenance of a register of freight forwarding members of the national association to record their liability insurance and the unique serial numbers contained on the FBLs distributed.

It should be noted that FIATA is currently reviewing its licensing and distribution agreements, to ensure alignment with FIATA's Digital Strategy, which will soon provide the possibility for the digital distribution of the FBL. Further information will be provided in due course.

THE CARGO INTEGRITY GROUP

WHY PROMOTING THE CTU CODE IS ESSENTIAL

The CTU Code is vitally important for loading, packing and securing cargo, as well as for those who receive and unpack the goods. The Cargo Integrity Group has now developed a 'Quick Guide', to make the 300-page code more accessible.

Poor practices when packing cargo transport units cause many hazardous incidents when transporting goods. The impact can be significant. Inadequately secured cargo, for example, may lead to incidents during handling or transport that can cause injury to workers or the public, damage to the cargo itself, as well as pose phytosanitary risks and potential environmental consequences.

FIATA is now part of the Cargo Integrity Group, which brings together international freight transport and cargo handling organisations representing different roles in the supply chain. The aim of the group is to improve safety, security, and the environmental performance throughout global logistics supply chains, in particular through the promotion of the CTU Code. FIATA's participation in the group is key to implementing its work. Freight forwarders play a crucial role in these processes, and FIATA's involvement will enable the group to reach the end customer and ensure awareness by small and medium-sized enterprises around the world.

What is the CTU Code?

The IMO/ILO/UNECE Code of Practice for Packing of Cargo Transport Units (CTU Code) is a joint publication of the International Maritime Organization (IMO), the International Labour Organization (ILO) and the United Nations Economic Commission for Europe (UNECE). It establishes a non-mandatory global code of practice for handling and packing shipping containers for transportation by sea and land, and

is relevant for every player involved in the global supply chain. The CTU Code provides comprehensive information and references on all aspects of loading and securing cargo in containers through the entire intermodal transport chain, taking account of the requirements of all sea and land transport modes. It provides guidance not only for those responsible for packing and securing cargo, but also for those who receive and unpack such units. It also addresses issues such as training and packing dangerous goods.

What's next

The original 300-page compendium of the CTU Code may prove challenging for most to digest. Thanks to the Cargo Integrity Group, a 'Quick Guide' has now been cre-

ated, together with a checklist for packing freight containers. Other communication efforts to facilitate understanding of the CTU Code are currently underway, to ensure easy access for those working first-hand in the logistics supply chain. The group will also continue its efforts to

raise awareness and work towards strengthened processes, also by collaborating with other industry and government stakeholders, working to improve regulatory requirements, and developing strengthened cargo-screening processes and containerinspection regimes. As the global voice of freight forwarding and logistics, FIATA will play a crucial role in this work, leveraging the expertise of its Working Group Sea Transport and its Advisory Body on Safety and Security.





STANDARDISING THE DIGITALISATION OF INTERNATIONAL TRADE

THE IMPORTANCE OF COLLABORATION TO REALISE THE ELECTRONIC FBL

The signing of an MoU in the FIT Alliance marked the start of FIATA's collaboration with four key players in the digitalisation of the Bill of Lading. Together they created a united front to ease the electronic transfer of the document.

Every player in the logistics industry shares the same dream – the seamless transfer of electronic Bills of Lading (eBLs) between the different actors involved in a shipment. A big step has now been taken towards this goal through the recent signing of an MoU by key industry players – BIMCO, DCSA, FIATA, ICC and SWIFT – to form the Future International Trade Alliance (FIT Alliance). What is required to finally make the exchange of eBLs possible, using different platforms, and which are legally recognised by all parties and jurisdictions involved?

The importance of industry standards

To facilitate the exchange of information between different stakeholders and systems, it is first required that a common vocabulary, a defined list of data and a common format, are defined and used by all parties. By definition, a standard should be mutually agreed upon by all players and universally adoptable, so that the whole industry can adhere to it. In the case of the Bill of Lading, FIATA has created its eFBL data standard, available as open source for the whole industry. Establishing a standard to serve the freight forwarding industry could only be achieved through a federation like FIATA, which has a global outreach, is a not-for-profit organisation and unites the needs of its members. This is not only the core mission of FIATA but also contributes to its relevance.

Other organisations such as BIMCO and DCSA have already, or are in the process of, publishing their own eBL data standards. All standards, including the eFBL data standard, should be interoperable, as they are based on a common syntax: the UN/CEFACT MMT Reference data model.

FIATA eFBL data standard

The open source industry standard is available through FIATA's GitHub repository for all software providers/firms. We strongly encourage National Associations as well as members to promote this standard with their local software providers, to implement it, or to do so on their own system developed in-house.

FIATA's paperless FBL solution and other future solutions will be based on the eFBL data standard.



For access to FIATA's GitHub repository.

Collaboration is key

The eFBL data standard is a first step towards the real digital exchange of Bills of Lading between platforms, which implies more complex challenges.

The first challenge that has to be overcome is technical interoperability between different eBL platforms. A solution should be agreed upon to allow an electronic Bill of Lading, together with the title and endorsement chain linked to it, to be transferred from one platform to another. Currently, each eBL platform has its own way of transferring titles between different parties.

The second and most complex challenge is the need for a harmonised legal framework to be adopted worldwide, to allow electronic transferable records to be legally recognised. Currently only six juris-



With partners: SWIFT, BIMCO, DCSA and ICC.

dictions have adopted the MLTER, UNCI-TRAL Model Law on Electronic Records, which enables recognition of the legal validity of Electronic Transferable Records. Those challenges are beyond FIATA's mandate and can only be solved through active collaboration between all industry players. The topics of interoperability and data ownership should be agreed upon in a democratic way. This is why it was crucial for FIATA to take part in the Future International Trade Alliance (FIT Alliance), which aims to generate awareness about the importance of common and interoperable data standards and common legislative conditions in international jurisdictions.

By joining forces with key stakeholders – namely banks (SWIFT), carriers (BIMCO and DCSA) and international trade representatives (ICC) – FIATA believes that a secure and democratic system of data exchange can be achieved, which will benefit all parties equally.

INTERVIEW

Jens Roemer, who chairs the FIATA Working Group Sea Transport, shares his thoughts and some updates about the global maritime crisis, how FIATA members can respond and what FIATA is doing for its members.

FIATA's thoughts and advice on the global maritime crisis

Jens Roemer, what do you discern to be the main issues and challenges that need to be addressed in the global maritime crisis?

lens Roemer: We must make sure that competition in the supply chain takes place on equal terms. We welcome competition, but it must be fair. Currently, competition isn't fair, with shipping lines enjoying beneficial treatment, which our industry does not have. FIATA has mentioned these on various occasions; I'll name but a few:

- State aid and government support.
- Tonnage tax and special tax regimes.
 - » Support remains for the use in portto-port activities. Instead, funds may be used to invest to compete with our industry on landside services in the supply chain.
- · Demurrage and detention practices, related to
 - » free times and tariffs, as well as inland container pick-up and returns.
- · Discrimination of merchant haulage and preferential treatment of containers in carriers haulage.
- · Unfair support of own services, using tariff tools to discriminate against other
- · Shipping lines are protected in consortia structures.
 - » Again, this protection mechanism may be used to compete with our industry on land-based services (including the sharing of data). But our industry isn't able to rely on the protection of consortia.

When they integrate vertically, shipping lines in effect compete with freight for-



lens Roemer highlights FIATA's multifaceted activities in the maritime sector.

warders, who are also their customers. Marketplaces become less efficient when entities have the power to levy unreasonable charges on their competition. Whether the containers move in merchant haulage, or in carrier haulage, there should be equal and fair treatment of customers.

"When they integrate vertically, shipping lines in effect compete with freight forwarders, who are also their customers."

With digitalisation entering the markets at full speed, I should also mention data, data sharing and data protection. All stakeholders have the responsibility to improve the maritime supply chain, and through digitalisation there is a great deal to improve. However, I'm concerned that shipping lines use developments such as the Digital Container Shipping Association (DCSA) and Tradelens to enforce their solutions on trade - some people even refer to this development as a data cartel. The maritime supply chain needs standards and the exchange of data, but we must ensure that our industry remains the owner of the data. FIATA's digital policy plays a very important role in this regard.

What can FIATA members do about it?

JR: Whilst FIATA will continue to create awareness and best practices, all members must use the information provided to use it for national use and to lobby their own regulators.

Just to share some examples: FIATA is in close contact with the pan-European association CLECAT, and fully supports its activities lobbying the European Commission. In the USA, we collaborate with our local member TIA and see interesting developments related to the FMC and politicians waking up to concerns about market distortion and rising inflation. In my Working Group Sea Transport we've established a global task force that will make global developments transparent to provide our members with information and best practices.

We can only urge our members to not only actively analyse our communication and to use it locally, but also to get feedback on the situation in our various member countries. We need our members to be active. These are challenging times and being complacent could turn out to be a fatal approach.



The maritime crises is lingering on, even with the pandemic losing impact. Currently, competition is not fair, because shipping lines can take advantage of beneficial treatment, which the freight forwarding industry cannot access.

How does FIATA collaborate with other stakeholders as well as international organisations on this?

JR: FIATA fully supports the activities of CLECAT in Europe or TIA in the USA. But it's important to work together with other stakeholders too, and shipping lines, on issues of common interest. It shouldn't be a problem to challenge and criticise shipping lines on issues of particular concern – this is only natural – whilst at the same time cooperating on subjects of common interest.

Shipping lines and shippers are our suppliers and customers. Together, we must have the ambition to improve the maritime supply chain. We must put controversial issues aside without emotion and be a pro-active and accountable partner for other stakeholders and the maritime supply chain as a whole. In fact, it isn't a choice, it's our responsibility to contribute, in order to improve the maritime supply chain.

In this context, the following developments come to my mind.

Cargo Integrity Group: The CIG promotes the safe and secure transport of containers in the maritime supply chain, while it's also dedicated to environmental performance throughout the logistics supply chain, by promoting the CTU Code. FIATA will play an important role

here, simply because our members are closest to their customers. For us forwarders, customers aren't codes or numbers that book through some platform or the other. Forwarders personally know their customers, their infrastructure, facilities and management.

That's why our industry is ideally positioned to promote the CTU Code and the safe and secure transport of containers in the maritime supply chain.

"It's now in the hands of our members to make sure that the eFBL standard becomes the main global standard for all house Bills of Lading."

FIT Alliance: In the FIT Alliance, FIATA actively promotes the standardisation of the digitalisation of international trade, which would not be possible for an individual entity. As FIATA Director General Stéphane Graber stated, "interoperability between all actors in the trade and transport industry is the key foundation to enable smooth data exchange and to streamline the endto-end shipping process for our members." Many people have echoed this. Data is the fuel of the future. That's why cooperation with other stakeholders in the maritime supply chain is an integral part of FIATA's

digital policy. Yes, developments related to DCSA and Tradelens must be seen critically, but that doesn't mean that FIATA should turn its back on the digitalisation of the maritime supply chain. With all due respect for valid criticism, we must always look for constructive communication and cooperation!

I'd like to mention the FIATA eFBL data standard. Our industry can be proud that FIATA has managed and published its eFBL standard. It has cost FIATA Headquarters a lot of resources and painful meetings – I know, as I participated in some of them! Our respect must go to Lucelia Tinembart, Guy de Pourtalès, Stéphane Graber and the whole team for a job well done.

But this is only a tiny first step! It's now in the hands of our members to make sure that the eFBL standard becomes the main global standard for all house Bills of Lading. FIATA decided to make the eFBL data standard (which supports the paperless FIATA Bill of Lading document) available free of charge – so all members should now make sure that their local TMS providers implement the FIATA eFBL standard by promoting it. At the same time, global forwarders should insist that their TMS provider uses the FIATA eFBL standard. At the end it's free of charge and in the interest of our industry. Let's unite and work together!

CONTAINERSHIP DWELL TIMES IN PORTS

SHORTER TURNAROUND TIMES ARE YET TO COME

Jan Hoffmann, the head of UNCTAD's Trade Logistics Branch, shares the first 'figure of the month' with you, in this new section dedicated to important and interesting industry statistics. He shows the differences in containership port dwell times all over the world in 2019 and 2021.

Over the last decades, year after year, ports have improved their efficiency, and all of the available data suggests that container ports have recorded a long-term trend towards shorter turnaround times. During the COVID-19 pandemic, however, things turned for the worse.

No improvement in H2/2021

Between the first half of 2019 (that is to say before the outbreak of COVID-19) and the first half of 2021, the global median time a containership spent in port increased by 11.8%, from 16.3 hours in H1/2019 to 18.6 hours in H1/2021. While we had hoped that things would start to improve during the year, unfortunately the latest data indicates that times went up even further during the second half of 2021, reaching a median of 19.9 hours in H2/2021 - that is to say, 19.8% higher than in H1/2019.

The featured chart in this issue of the FIATA Review depicts the trend in a number of selected countries from different regions. The large majority of countries has seen the situation worsen since 2019.

The COVID-19 pandemic has led to slower processes in ports and intermodal connections, resulting from lockdowns, port personnel on sick leave, and frictions caused by the need for social distancing.

Lower efficiency and greater needs

The time a ship spends in port is determined by a number of variables, including the efficiency of operation and the procedures of government agencies. In some ports, for example, operations only start after customs and other officials have physically visited the ship for paperwork. The 'call size', that is to say how many containers are loaded and unloaded during a call, also has a bear-

ing on the time it takes to conclude stevedoring operations, however. Larger ships tend to be associated with larger call sizes. Thus longer turnaround times are not necessarily an indicator of lower efficiency, but to some extent, at least, also reflect the need to stay in port longer if more cargo is loaded and unloaded.

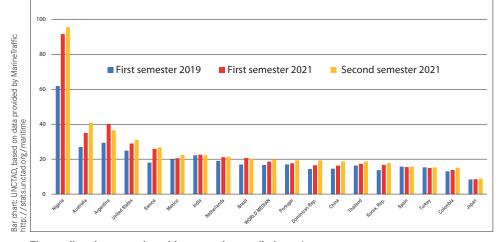
Empirically, the countries with the shortest turnaround times include those with the largest volumes, as ports in these countries have invested in the latest technologies and largest and fastest gantry cranes. But some of the smallest countries also record very short turnaround times. If a port only welcomes one ship every other week, and only a small number of containers are loaded and unloaded, there is no congestion and the time in port can be very short.

Solutions are at hand

The solutions needed to improve turnaround times are not rocket science. Empirically, infrastructure investments, private sector participation in operations, digitalisation, and trade and transport facilitation in general have all shown to help.

For further analysis of these statistics see Chapter 4 of UNCTAD's 'Review of Maritime Transport 2021' (http://unctad.org/ RMT). For the underlying statistics, see http://stats.unctad.org/maritime.

Jan Hoffmann is the head of UNCTAD's Trade Logistics Branch, in its Division on Technology and Logistics.



The median time containerships spent in port (in hours).

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INTERVIEW

Cybersecurity has to be addressed, to protect the freight forwarding industry. FIATA reached out to the expert Svante Einarsson, a senior cybersecurity adviser to DNV GL, who shared his insights on why cybersecurity should be a top priority for all businesses.

A three-dimensional approach – educate, raise awareness, train

What is cybersecurity and why should we take it seriously?

Svante Einarsson: Potential risks threatening business are normal, but today we also have to consider the digital dimension. Cyber risks can be intentional, for example if a hacker tries to manipulate a system to crash it, or to steal information, or unintentional, such as an error by a user or a software provider. Cyber risks can even threaten human lives, but also property and assets, from single vessels to the complete infrastructure, such as a port terminal. One of the core aims of cybercrime today is to steal money, which is often attempted by organised crime, with well-trained cyber criminals sneaking into businesses of all sizes. The main risk facing every business today however, isn't becoming the direct target of a cyber attack, but becoming a collateral victim of attacks that can spread easily from one organisation to another, through integrated networks!

Why is cybersecurity a rising threat in the logistics industry?

SE: As digitalisation advances and businesses exchange more information and data, the risk of malware spreading is huge. This risk can come from companies you do business with, or even from a vendor or a software supplier who may already have been hacked.

What are the main risks/threats that we need to be aware of?

SE: I think ransomware attacks will remain one of the main threats, at least over the next two years, but one of the latest trends



Svante Einarsson, Cyber Security Team Leader at DNV, points out main current risks

we've see is exploiting built-in system vulnerabilities. The 'NotPetya' incident, which hit the shipping and logistics industry very hard -A.P. Moller-Maersk was perhaps the most visible victim- was an example of this. Microsoft publicly released information about a known vulnerability in its software, and hackers used that to launch an attack that in the end compromised organisations that hadn't taken all measures to protect themselves. Cybersafety is another important issue. It aims to prevent unintentional incidents caused by a software design fault. Serious measures should be taken to enforce vendors to carry out in-depth quality assurance tests, obsolescence and change management.

What are the key measures that can be taken by a company to protect its business and its clients?

SE: A three-dimensional approach should be taken by all businesses: educate people, raise awareness and train employees about cyber risks. Continuous information in different formats and simple do's and don'ts should be updated regularly. Apply simple processes to be followed. Define who is allowed to do what when handling critical systems and have clear processes that have to be followed - when implementing new systems, during normal operations and in the course of responding to an incident. Use secure technology. Segregation is key, so make sure to have asset inventories, including of the software you use, and interact with and know what all their connectivities and dependencies are. Also make sure to have back-up solutions in place.

How can FIATA, as an industry federation, assist its members to be properly equipped against cyber risks?

SE: I think an umbrella organisation such as FIATA should focus on promoting awareness of cyber risks through initiatives such as this article, but also through training and facilitating fictive exercises. What's also beneficial is promoting collaboration and the exchange of information between members, through groups in which firms can freely share experiences related to cyberattacks, for example sharing what worked well as well as bad experiences.

FIATA DIPLOMA VALIDATION

THE PATH TOWARDS ENSURING A SKILLED WORKFORCE

For more than 25 years, dedicated teams of FIATA experts, supported by the FIATA Head Office, have been validating Association Members' training programmes that lead to a FIATA Diploma. Learn more about the ins and outs of this crucial process in this insight into validation.

February 2022 marked the start of the 50th (re-)validation session, so FIATA would like to provide its readership with an insight into this core task of the FIATA Logistics Institute (FLI). It is crucial in helping to equip the industry workforce with the necessary sets of skills.

What is (re-)validation?

Validation is the process through which training programmes are vetted by FIATA. Only successful graduates of validated training programmes are entitled to be awarded FIATA Diplomas - globally recognised vocational training qualifications. Nowadays, there are two main diplomas the FIATA Diploma in Freight Forwarding (FDFF) and the FIATA Higher Diploma in Supply Chain Management (FHDSCM), based on FIATA's Minimum Standards, which indicate the content of the training programme.

The FDFF consists of fourteen modules, including all key topics for international freight forwarders, such as multimodal transport, air transport, customs procedures, and information and communication technologies. The FHDSCM comprises eight modules, such as global purchasing, contract management, and production and operations management. Validation is the exclusive prerogative of FIATA National Associations, as they are the only ones that can request FIATA validation of training programmes.

Re-validation occurs when a training programme is re-assessed by FIATA, after it has already been validated. This must occur every four years - which reflects the dynamic

nature of the logistics sector. Through this process, FIATA ensures that validated programmes are updated to best match the evolving needs of the industry and related standards.

What is the process about?

Validation sessions usually take place twice a year - they are fully online nowadays, due to the pandemic - and last approximately ten weeks, depending on the number of associations taking part. There are ten in the 50th session, for example. The (re-)validation is performed by the members of the FLI Task Force 1: FIATA Training Standards, which is led by the FLI Chair and supported by the FIATA Head Office. These dedicated volunteers are part of National Associations and have logistics sector expertise, as well as thorough knowledge of the necessary industry skills - often also with experience in training and education.

Validators usually work in small teams, following common guidelines, and are each assigned one or several training programmes to validate. They gather at the beginning of the session to review the procedures, and towards the end, to reach a collective decision on the validation outcome for each training programme submitted.

The central part of the process is the thorough as-

sessment of the training material submitted by the Association: course manuals, syllabus, lesson plans, course schedules, student assessment tools, instructors' curricula, etc., all of which are carefully reviewed by the validators. They are driven by two main questions. Are all of FIATA's Minimum Standards fully covered by the programme? Is the training material and environment conducive to quality learning?

Today, more than 40 Association Members have validated training programmes leading to a FIATA Diploma, creating valuable opportunities for their own members' employees and individuals to grow professionally and contribute to ensure a qualified workforce for the whole industry. Discover the numbers and figures behind the FIATA Diplomas on the next page!



THE SUCCESS STORY OF THE FIATA DIPLOMAS IN FIGURES

18,600 DIPLOMAS AWARDED

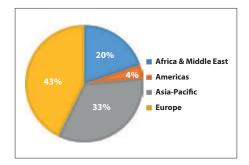
FIATA's National Association Members and their students have accomplished a great job since 1996, when the FIATA Diploma in Freight Forwarding was created. The FIATA Higher Diploma in Supply Chain Management has also been on since 2013.



With more than 18,600 FIATA Diplomas delivered to date, FIATA has seen a positive evolution in the success of its diplomas, catering to the industry's education needs over time. The 18,207 students who have graduated with the FIATA Diploma in Freight Forwarding (FDFF) since its creation in 1996 demonstrate its importance in the freight forwarding business. As for the FIATA Higher Diploma in Supply Chain Management (FHDSCM), there have been 429 graduates since 2013.

A worldwide impact

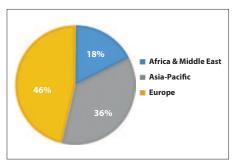
Pie charts 1 and 2 show the international scope of the FIATA Diplomas and the value they carry in every FIATA region. It shows that FIATA educational opportunities have no boundaries. The potential of Region Americas should be noted, with a clear objective of developing FIATA Diplomas in this part of the



Pie chart 1: Total FDFF per FIATA region, 1998 – 2021.

world too, in view also of the 2024 FIATA World Congress taking place in Panama. Homogenising the share of diplomas delivered all over the world is one of FIATA's objectives.

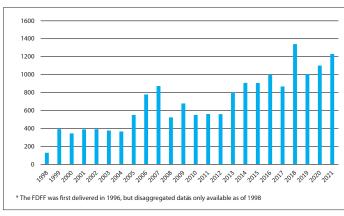
FIATA is proud of the excellent and growing results shown by bar charts 3 and 4. Indeed, a constant increase in the number of graduates over the years can be observed for the FDFF. After record-breaking years in 2017 and 2018, the FHDSCM continues at significant levels. Introduced less than ten years ago, the FHDSCM has progressed well and is now established as a valuable senior-level certificate, providing access to industry management positions.



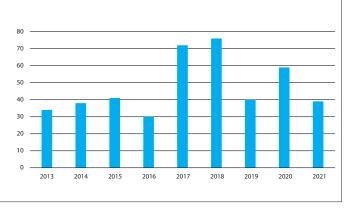
Pie chart 2: Total FHDSCM per FIATA region, 2013 – 2021.

Despite COVID-19, the graduation rate has increased by 36% since 2019. This illustrates how vital the industry has been in this unprecedented period, but mostly that upto-date qualifications matter. This is a significant accomplishment from FIATA's National Association Members and students, without whom none of this would have been possible. FIATA is looking forward to reaching 20,000 FIATA graduates soon.

FIATA National Association Members or prospective logistics students interested in delivering or learning more about the FIATA Diplomas should check out <u>our website</u> or get in touch at <u>training@fiata.org</u>.



Bar chart 3: Number of FDFF delivered per year, 1998 - 2021.



Bar chart 4: Number of FHDSCM delivered per year, 2013 - 2021.

MEET THE YOUNG LOGISTICS PROFESSIONALS...

In this new section with stories of young talents FIATA presents the next generation - Young Logistics Award finalists and young professionals involved in their Associations. Daniella Smal, of the Zambia Customs and Forwarding Agents Association (ZCFAA) and 2015's YIFFYA Winner, starts us off in style.

"Know your self-worth"

What made you decide to get involved in the freight forwarding community?

Daniella Smal: I grew up in the industry, and quite often used to accompany my mum to the borders of Zambia where I would see kilometres of trucks waiting to move, elephants helping themselves to maize on the back of parked trucks, and confusion, all of which I thought was very exciting. I wanted to be involved in it all from a young age.

What is the key to becoming a successful female entrepreneur in a rather maledominated industry?

DS: Starting out Pro-Africa, and making it a success, came as a result of having as broad shoulders as the men, knowing your self-worth, knowing the facts, having the courage to try and make a difference while using the voice you have, focusing on the positive and being able to lean on your points of unwavering support. Build yourself an honest reputation and establish relationships with honest people who'll listen and amplify your opinions and thoughts, praise your work to others and advocate for yourself.

As a young female logistics professional, what kind of challenges are there in the industry?

DS: There are social expectations and beliefs about women's leadership abilities. Honestly, I don't think there are enough females involved in senior positions in the industry. Women tend to have a natural eye and attention for detail, which can make all the difference. With the added pressure of feeling like we're working under a microscope, I find that we don't generally take the opportunity to challenge situations out of fear, even when we know we're right. Lastly, I find there's an overall lack of mentoring and career development opportunities that could encourage more women to join the industry.

How are you involved in your National Association, and why do you think it is important that young logistics professionals are involved in these?

DS: I was elected Secretary of the Zambia Customs and Forwarding Agents' National Association (ZCFAA) in 2020. I think it's important for the younger generation to be involved in National Associations so that they can be exposed to different aspects and technicalities of what's happening on the ground, while forming and establishing relationships with key organisations and individuals. It's important to learn from those in the industry, while sharing insights into modern and new technical ways of improving things for a smooth and efficient future.

How did participating in the YLP competition further your career?

DS: The competition gave me a great deal of new-found self-confidence. I found myself being welcomed into a thriving world of likeminded people from all over the globe who have the same passion and desire for the industry to succeed as I do, and I benefited from an overwhelming sense of belonging, encouragement and motivation to grow, not only locally but internationally as well.



Welcomed into a world of like-minded people.

What advice would you give young YLP candidates, particularly women, who might hesitate to participate in the competition?

DS: Just try, try to the best of your ability, learn from it, and use the lessons you've learnt as a step towards self-awareness, self-growth and self-achievement. Build your confidence by making the choice to participate, be excited about your potential in this opportunity and let your passion drive you.



FIATA REGION AFRICA AND MIDDLE EAST PROJECT LOOKING AHEAD

Get updates and perspectives from each FIATA Region in this new section of the magazine, which will feature hot topics from Africa and Middle East (RAME), the Americas (RAMs), the Region Asia-Pacific (RAP) and Europe (REU). The first interview for the section was given by Salahadin Khalifa Abdulkadir, Chair of FIATA RAME.

Esteemed Members of the Region Africa and Middle East (RAME) of FIATA,

What a period we're all passing through. The past two years have been exceptionally testing, and I extend my best wishes and prayers to you during this time. Our businesses and the logistics industry have been hit hard by global lockdowns and closures affecting port services, transport service providers, and our freight forwarding supply chain. Even our annual face-to-face gatherings were postponed.

Despite the challenges, I applaud and commend the past leaderships of both FIATA and FIATA RAME, Immediate Past President Mr Basil Pietersen and Chairman Mr David Phillips respectively, who both had the misfortune, under immense pressures, of not holding a single face-to-face meeting

of our regional and global congresses, and yet kept us all well-directed and connected. I'd like to thank them for their tireless efforts, leadership and perseverance in the exceptional work done through means of virtual meetings. It's been a learning process, which the Presidency and Secretariat managed with excellence, adapting to the new norm of meeting virtually, but hopefully soon also in person. I'm sure we are all aspiring to reconnect once more.

The pandemic has however brought opportunities which we should use, share and develop in our region. We must see the positivity ahead. We must examine how being a part of FIATA strengthens our positions as companies, sectoral associations and regional trade facilitations. Regular virtual meetings, in which we can exchange thoughts, help us to move forward.

For this, we're delighted to have the strong support of the secretariat of FIATA, Director General Stéphane Graber and his team, whom we look forward to seeing soon in person, and indeed continuing to receive their guidance and support. Our common strength and regular exchange of ideas shall permit us to achieve the tasks ahead. We are one and for us!

Firstly, we must ask, what happened during the pandemic to us as members of the region? We must query each individual and association member about the impact on their businesses and sector in their countries. Where are we all, how are our businesses? Secondly, we're able to work in synergy with FIATA, which can support us with digital and other tools. By having a dedicated page on the

FIATA website for our regions, amongst other support, we can come together and strengthen the regions as a whole, and show the progress which we're making.

FIATA's role is without doubt a key to the success of the development of regional freight forwarding industries and critical in the economic integration agreements between countries.

The AfCFTA of our region has a project developing in which the economic integration of the countries of Africa by 2063 is well underway. The need for collaboration between FIATA with the African Union is also critical, and the MoU which the two parties committed to at the 2019 Cape Town FIATA World Congress should be strengthened through the opening of a FIATA RAME office in the city of the present HQ of the African Union, and aligned with the FIATA head office. A structured FIATA RAME secretariat office would also benefit the objectives of the region.

We must not lose sight of the growing valuable membership of the National Associations and Individual Members in FIATA RAME. Only through the strength of our membership can we build our strengths of being a force for policy change in our countries and regional logistics industries. In this regard, all members of FIATA RAME must make it their duty to search for associations and freight forwarders in their countries or neighbouring countries which aren't members of FIATA yet, and share details with the secretariat, with their recommendations.

With kind regards, Salahadin Khalifa Abdulkadir



FIATA REGIONS AMERICAS, ASIA-PACIFIC, EUROPE

GOOD COLLABORATION

After the pandemic the FIATA Region Americas (RAMs) banks on dialogue, the Region Asia-Pacific (RAP) on collaboration to foster the economic upswing and the Region Europe (REU) on mitigating the economic and social impact.

REGION AMERICAS (RAMS)

Jorge Heinermann comments on how governments and businesses can solve congestion and delay problems.

The FIATA Region Americas (RAMs) is currently coming out of the COVID-19 pandemic, which has been a global challenge. In RAMs, economic output has fallen significantly, with the first year seeing a rebound, but many countries are already noticing a significant

Governments in our Region are meeting to discuss supply chain frustrations with a wide variety of participants. There are initiatives that can be brought forward to improve the situation, by solving congestion and delay problems, operational changes, government regulatory simplification and spending on im-



Jorge Heinermann, **VP Region Americas** AAACI, Argentina

proved infrastructure. Governments businesses must sit at the table together to discuss these items. The lack of space in ports and the resulting supply delays are widespread.

Many of FIATA's National Associations have presented their claims to

their national authorities.

There is no doubt that we are facing a definitive change in our industry, and that there will be a new conception in the global logistics chain which will generate new production and supply concept, in which the forwarders will continue to be present.

REGION ASIA-PACIFIC (RAP)

Yukki Nugrahawan Hanafi stresses the importance of collaborating in an age of growing digitalisation.

The Asia-Pacific Region has become an attractive region for economic development, and the world is now looking at it with new favour. The link between the logistics sector and industrial activity is naturally very strong, with logistics experiencing variations in such activity.

Thus, as a result of COVID-19, the imbalance in trade between regions has resulted in a shortage of containers, which has translated into very high freight rates. We need to address this issue together, to ensure that the successful running of businesses is achieved by working collaboratively, not

competitively.



Yukki N. Hanafi, VP Region Asia-Pacific, Chairman ALFI/ILFA

The FIATA Region Asia-Pacific (RAP) is looking for good collaboration, to ensure that the logistics industry is handled by reliable partners. We also need to be adaptive to change, develop capacity building and IT connectivity. We

all understand that human resources and IT connectivity have become the most important dimension for the success of logistics services. Together, FIATA RAP can build a strong business partnership and successful business collaborations inside and outside the region.

REGION EUROPE (REU)

Antonella Straulino, Region Europe Chair, shares her comments on the forwarding industry in Europe.

The EU Recovery and Resilience Facility, which was created to mitigate the economic and social impact of COVID-19 and make the national economies of the EU more sustainable and better prepared for challenges posed by the green and digital transitions, will be an important resource for the freight forwarding community. The importance of rail infrastructure is noteworthy, especially considering the growing importance of sustainability, with funds specifically targeted to the segment. Other priorities will be digitalisation and sustainable multi-



Antonella Straulino, Chair FIATA Region Europe, Fedespedi.

modal transport. With regards to the green transition, the 'Fit for 55' package will deeply impact our sector. The EU climate ambition is to cut emissions by a minimum of 55% by 2030. The package contains several different rules, from a revision of the EU

Trading Scheme (with an extension to maritime transport and a new ETS for road) to provisions for enhancing green fuels. Whilst I'm writing these words we face a war in Europe, which makes everything else unimportant. Let's be strong and unite!

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MEMBER NEWS

WHAT'S ON WITH FIATA'S MEMBERS

Here are the latest updates from the various FIATA National Association Members, covering participation in training programmes, anniversaries and new missions.

CHILE, ALOG



STRATEGIC PLANNING ALOG CHILE 2022 - 2026

From November 2021 to January 2022, ALOG Chile carried out its new Strategic Planning 2022–2026. We reviewed our Vision and Mission and developed a Purpose according to the "times we're facing".

- The variables of the environment were analysed, with stakeholders and industry trends pinpointed to identify opportunities and threats for ALOG in the present as well as in the future.
- The attributes of the 'Value Proposition' were agreed by ALOG, members, colleagues, partners, and its board of directors.
- The strategy was translated from the definition of the strategic objectives to fulfil the vision and purpose of ALOG. Indicators and strategic initiatives were defined to take concrete charge of the way forward and generate greater value for our members and our country in the future.

Our purpose is to "strengthen and develop Chile's logistics industry by favouring conditions for a transparent logistics scenario, with clear and fair rules, contributing to the growth of our country."

CHINA, CIFA



On 4 February the customs authorities of China and Russia signed an agreement on the mutual recognition of authorised economic operators (AEO) between the General Administration of Customs of the People's Republic of China and the Customs Administration of the Russian Federation. After the realisation of this AEO agreement, goods directly imported and exported between AEO enterprises of the two countries will enjoy the relevant convenience measures in customs clearance, significantly reducing storage, logistics and other trade costs of related companies. Benefits include further promotion of the security and smooth running of their supply chains. So far, China has signed AEO agreements with 22 economies, covering 48 countries or regions. Among them are 32 'One Belt, One Road' countries, five members of the Regional Comprehensive Economic Partnership (RCEP) and 13 Central and Eastern European countries.

ETHIOPIA, EFFSAA



EFFSAA trained 68 professionals in dry port management; warehouse management; consolidation and deconsolidation;

and staffing. This special capacity-building programme, organised in partnership with Trademark East Africa (TMEA), was designed for government officials. The training session was followed by a field visit to the Modjo Dry Port, and concluded with a warm closing programme. The guests of the programme, where trainees received a certificate of completion, included Mrs Elizabeth Getahun, EFFSAA President; Mr Dawit Woubishet, EFFSAA Vice President and the Chair of AFI; Mr Salahadin Khalifa Abdulkadir, Chair of RAME; and Mr Abenet Bekele, TMEA Country Director.

HONDURAS, AHACI



On 24 January the Asociacion Hondureña de Agencias de Carga y Logística Internacional (AHACI), in alliance with the Secretariat of Economic Development (SDE), carried out the socialisation and linking of its associates in the category of freight forwarder to the Integral Management Portal for Foreign Trade of Honduras (PGICE), a valuable tool developed as part of the trade-facilitation agreement with the World Trade Organization (WTO).

The portal was created by SDE and the National Logistics Council (CNL), with the technical assistance of the IDB, and aims to facilitate, streamline and simplify exporting and importing processes. AHACI







Some pictures from EFFSAA's FIATA Diploma courses and graduation ceremonies.

and SDE agreed to work together to review and enrich the information in the tool, and approved the linking of the portal in electronic media to all its associates.

HONG KONG, HAFFA



HAFFA's commitment not only to serving the logistics industry, but also to creating new opportunities for future generations, was furthered in 2014 with the creation of the HAFFA Training School. To encourage operators to upgrade their sets of skills in the prevailing challenging environment, the HAFFA Training School offers the most cost-effective delivery of professional training, with a strong focus on identifying training standards and outcomes that would benefit members and the industry, in compliance with IATA requirements and/ or with government legislations. For more information on the school, please visit https://www.haffa.com.hk.

KOREA, KIFFA



KIFFA is preparing to welcome everyone to the 2022 FIATA World Congress in Busan! Busan is well-known all over the world as a port city. Most logistics professionals must have heard of the fame of Busan. KIFFA hopes that you will all join this year's congress to catch up on the chance to network with other freight forwarders!

For more information, please do not hesitate to visit our website (www.fiata2022. or.kr) and have a look there at the programmes we are putting on.

NORWAY, NHO



An all-time high for railfreight in 2021! According to statistics, railfreight has not looked so good since 2009, with growth of 12% for combined transport in 2021. It seems the negative trend regarding volumes of goods on the railways has been reversed, says business and policy director Ole A. Hagen.

Over long distances, railfreight will probably retain its ability to compete, even though road freight is continuously evolving new zero-emissions solutions.

SINGAPORE, SLA



The Singapore Logistics Association (SLA) kick-started 2022 with an MoU with the **Singapore Institute of Technology**. This was agreed in order to groom future-ready SCM talents who have honed in on digital

logistics skills and applied industry learning opportunities.

In collaboration with the <u>Singapore Computer Society</u>, we also held our very first physical event since COVID-19, which was organised to help logistics companies navigate cyber risks as the global logistics system becomes more digitally connected. SLA will continue to focus its efforts to drive digitalisation, business innovation, ESG, human capital development as well as operations excellence.

For #SGLogistics updates, visit https://www.sla.org.sg.

SYRIA, SIFFA



The Syrian International Freight Forwarding & Logistic Association (SIFFA) conducted its first training course on Dangerous Goods Regulations from 19–24 December 2021, in cooperation with the Syrian civil



Rail freight: the importance of multimodal solutions cannot be overestimated.

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aviation authority, and the Syrian ministry of the interior. During the course, the interior ministry deputed specialised officers from the drug enforcement administration, who gave lectures and educated trainees about drug laws, types of drugs, the means of shipping and smuggling them, and how shipping agents should deal with prohibited goods. All enrolled students were granted certificates endorsed by the authorities concerned.

TURKEY, UTIKAD



In January 2022 UTIKAD's Innovation and E-Commerce Focus Group published its 'Proposals for Facilitating and Increasing the Volume of B2C E-Commerce Report', in which the status of the e-commerce industry is conveyed, with up-to-date data. The report aims to provide solutions for problems in the e-commerce industry, and for the new challenges faced by the industry, both from the operational and the financial side. This report is the second report produced by UTIKAD on the subject of e-commerce. The interrelation between e-commerce and logistics is also highlighted by the report.

TURKMENISTAN, TLA



The Maritime Transport Development Project has been implemented in Turkmenistan, seeing the construction of two ro-ro class ferries for railway wagon transport, and one dry cargo ship at the 'Balkan' shipyard, located on the territory of the international sea port of Turkmenbashi.

The aim of the project is to enhance the capacity growth and effectiveness of maritime transport operations through the port on the Caspian Sea, a part of the Europe–Caucasus–Asia transport corridor, as well as to develop in-country shipbuilding facilities. To implement this project, Turkmenistan will attract loans from the Islamic Development Bank and the International



30 years ago, the Charter of Ukvrenshtrans was adopted and the association registered.

OPEC Development Fund. The replenishment of material and technical facilities for the gateway will allow the full potential of the international seaport to be developed and used.

UKRAINE, AIFFU



In AIFFU we have a nice tradition of meeting at the end of the year, in a light atmosphere on New Year's Eve, to summarise the year's activity, talk about plans and share viewpoints. Each participant takes the microphone to talk – we call it 'The Freight Forwarders Stand-Up Event'. AIFFU prepared an annual report and some gifts for this event. The goals we have set ourselves for 2022 include conducting five industry events, developing the Ukrainian logistics effectiveness index, and publishing a guide dedicated to freight forwarding activity.

UKRAINE, UKRVNESHTRANS



The history of the creation of the association 'Ukrvneshtrans' began in Odessa on 12 February 1992, when twelve freight forwarding enterprises of the former 'Soyuzvneshtrans', of the USSR foreign trade ministry, established the Association of Freight Forwarding Organisations of Ukraine 'Ukr-

vneshtrans'. At this founding meeting, the charter of the association was adopted and Korenchuk Leonid Gavrilovich, General Director of SE Ilyichevskvneshtrans, was elected first President of the association, and Likhodey Ivan Alekseevich, General Director of Kievvneshtrans, was appointed General Director.

Fulfilling the decisions of the constituent assembly, the Charter of the Association 'Ukrvneshtrans' was sent to the state administration of Kiev and it was registered on 22 May 1992. This date is the starting point for the start of work and creation of the association 'Ukrvneshtrans', and this year we celebrated our 30th anniversary.

VIETNAM, VLA



The Vietnam Logistics Business Association (VLA) would like to inform FIATA members that we have sent a letter of intent to bid for the 2025 FIATA World Congress. Vietnam is a vibrant economy in Asean and Asia. Our growth has been phenomenal, despite COVID-19. Our freight forwarding and logistics industry will offer abundant opportunities for global players to meet in this young economy.

THE LPI AND FIATA'S COLLABORATION WITH THE WORLD BANK

ON LOGISTICS' FRIENDLINESS

In this article we learn more about the LPI Report, its significance and collaboration between FIATA and the World Bank. Their joint work goes back many years and supports our members in various ways.

After a break of two years, the LPI is back again, a strong pillar of the long-term collaboration between FIATA and the World Bank. A key focus of this togetherness lies in the Logistics Performance Index (LPI), a biennial index of global trade logistics performance that has been produced since 2007. The index is published together with a report entitled 'Connecting to Compete - Trade Logistics in the Global Economy' (previous editions: https://lpi.worldbank.org/report).

The index rates the 'logistics friendliness' of 160 countries and provides analyses of current developments in global logistics. Each LPI report is fuelled by a survey of global freight forwarders. For many years, FIATA has been instrumental in reaching out to potential survey respondents. "Since the beginning, I believe, although that was before my time," says Christina Wiederer, of the World Bank Group. This year, FIATA has again agreed to support the World Bank LPI team in promoting the survey to potential participants. "Given its pivotal role in global freight forwarding, FIATA and its members are the best survey partner we could wish for" according to Christina Wiederer.

FIATA HAS ASKED THE LPI TEAM TO SHED SOME LIGHT ON THE INDEX FOR OUR MEMBERS.

What is the LPI?

Christina Wiederer: The Logistics Performance Index (LPI) is a benchmarking tool created by the World Bank in 2007, to help countries identify the challenges and opportunities they face in their performance on trade logistics, and see what they can do to improve their performance.

The collaboration between FIATA and the World Bank goes back many years. The two signed an MoU in 2014, in which numerous fields of collaboration were addressed. It is of mutual interest for the two parties to support one another, with a key aim of FIATA being to represent, promote and protect the interests of the industry participating in international bodies dealing with logistics and trade facilitation. Likewise, the World Bank's strategies for trade and transportation consider trade facilitation and logistics to be key enablers for its aim to "reduce poverty, improve living conditions and promote sustainable and comprehensive development in its developing member countries."

The latest edition - the LPI 2018 - allows comparison of 160 countries, and highlights global advances in logistics.

What is the value of the 2018 LPI report for the freight forwarding community?

Lauri Ojala: The LPI provides a robust metric to compare trade logistics' 'friendliness' in 160 countries. Importantly, it expresses the perceptions of freight forwarders and other logistics professionals on the ground, and underlines the importance of well-functioning global logistics for international trade and development.

What's new in the LPI in 2022?

CW: For the first time since its first publication in 2007, this year's LPI edition will feature actual supply chain tracking data from various modes of transport. In addition, as in previous editions, the LPI 2022 will be preceded by a survey of global logistics professionals, which gauges their perceptions of developments in countries they do business with. The World Bank invites all of FIATA's members and member organisations to participate in this year's survey, which will go live in the second quarter of 2022. Details will be shared in the FIATA newsletter.



Mr Lauri Ojala has been Professor of Logistics at the University of Turku (Finland) since 1997. His expertise includes international logistics and

maritime economics, also from a policymaking perspective. He has worked as an expert for the World Bank, EC and several other international organisations as well as transport ministries.



Christina Wiederer is a Senior Economist at the World Bank Group in Washington DC (USA). She was a co-author of the World Bank's 2014, 2016,

and 2018 Logistics Performance Index (LPI), and is the project lead for the 2022 LPI. She holds a doctoral degree in Economics from the Technische Universität Berlin (Germany).



FIATA HEADQUARTERS' MEETING TIME TO RECONNECT

Two years after its last face-to-face meeting, FIATA is putting on its 2022 Headquarters' Meeting in Geneva, from 17-20 May. This year's edition, entitled 'Reconnect', will give exchanges and collaboration top billing.

From 17-20 May, FIATA Members are invited to join one of the flagship FIATA events of the year - the FIATA Headquarters' Meeting. This annual, not-to-be-missed rendezvous provides time for exchange, away from daily business prerogatives, and to work on topics crucial to the freight forwarding industry.

This year's Headquarters Meeting will be very different from last year's. With the sanitary condition evolving in a positive way throughout the world, more and more countries have now opened up their borders for travel, and the Geneva-based FIATA Head Office will welcome its Members for the first time in the city for an in-person meeting. An alternative digital option is also being developed, so that FIATA can give the opportunity to those not able to travel to Geneva to participate in the event in person.

A time for exchanges with international organisations

This Headquarters' Meeting will make room for exchanges between members, with dedicated sessions for all FIATA Institutes, Advisory Bodies and Regions. They will be able to benefit from the central location of the new FIATA Head Office in Geneva, the European heart of international and non-governmental organisations.

In all of the sessions of FIATA's bodies, participants will be able to exchange with high-level stakeholders who have a crucial impact on FIATA Members' activities. Delegates from UNCTAD, WCO, UNECE and UNCITRAL will participate, as will representatives from IATA and IRU, to name but a few. They will provide their insights on key subjects and share their knowledge and



It is high time that the physical reunion of FIATA members restarts – welcome to Geneva!

expertise, and also take time to listen and exchange directly with FIATA Members for the benefit of the wider freight forwarding community.

Their presence also represents a unique opportunity from a collaboration standpoint. Collaboration that, for some, has been well in place for many years, whilst for others it is to be consolidated or created.

Focus on FIATA's partners

With the pandemic of the past two years preventing most international travel, the FIATA Headquarters' Session aims to make up for lost time. The programme provides many break periods for Members to reconnect, discuss opportunities and future trends, and simply to catch up.

The breaks will also be a tremendous opportunity for FIATA Members to discuss and exchange with long-term and recent FIATA partners, to find out what important milestones they have achieved with FIATA, and (re)-discover the exciting opportunities they offer. Partners such as Avalon, FIATA's

bond programme provider, and Komgo, which works very closely on the FIATA eBL, to name a few, will be present. The full list of partners will be published in due time.

Social events

FIATA also offers many social opportunities for Members to reconnect during the Head-quarters' Session.

Delegates are invited to a welcome cocktail at the Hôtel Royal Genève on the evening of Monday, 16 May (before the official start of the Headquarters' Meeting), as well as to a cocktail dinner at the conference venue on the evening of Wednesday, 18 May.

Geneva also has a lot to offer FIATA members who have never visited the city, or to rediscover for others. Everyone is invited to join a city tour on the evening of the first day of the Headquarters' Meeting, on Tuesday, 17 May, for which participants will receive an invitation. Should you want to receive more information about the Headquarters' Session, please do not hesitate to write to FIATA's events team at events@fiata.org.

FIATA HEADQUARTERS' MEETING QUESTIONS ABOUND

When does the meeting start? Which hotel should I book? What is the weather like in Geneva in May? Is it hybrid meeting? You probably have many questions in mind, to which we hope we have provided the answers below. Contact events@fiata.org for more info.

When does the meeting start?

The FIATA Headquarters Meeting officially starts at 09:00 CET on Tuesday, 17 May, and finishes on Thursday, 19 May at 18:00 CET for all delegates, except for Extended Board Members, who will attend the Extended Board meeting on the morning of Friday, 20 May.

Where will the event take place?

The event will be held in Geneva (Switzerland), in the city's International Conference Centre Geneva (CICG). The meeting can be found on level 1 of the building, in Amphitheatre D, the largest room in the CICG. In addition you will also find the restaurant and its terrace on this floor. You can follow the signs from the entrance of the building to find the Headquarters' Meeting room.

Which hotel should I book?

FIATA has negotiated special rates with the Manotel network, which offers a selection of six hotels in Geneva from 3 to 5 stars, in close proximity to both the venue for the meeting, the CICG, and the Hôtel Royal Genève, where the welcome cocktail will be held. In-person delegates are encouraged to book their accommodation through this <u>link</u>.

What is the weather generally like in Geneva in May?

May is a comfortable month in Geneva, with average temperatures varying between 9.1°C (48.4°F) and 19.7°C (67.5°F). So, what to wear in May? Visitors travelling to Geneva should plan to bring a completely waterproof rain jacket too, since it often rains. Plan on layering your clothes.

How will remote participants connect to the meeting?

Zoom will be the conference system used for all sessions. Online delegates will be able to interact with on-site delegates and speakers and actively share their comments. More details on the technical aspects of the Headquarters' Meeting will be communicated to those registered as online delegates closer to the date.

How much does it cost to participate to the Headquarters' Meeting?

Registration for the event is mandatory and costs CHF 360 for in-person delegates and CHF 160 for online participation.

How easy will it be to travel to Geneva from abroad?

For more information about COVID-19 travel restrictions, please check Switzerland's <u>Federal Office of Public Health</u> website for information on entering Switzerland from abroad. Please make sure to regularly check this website, in case the situation deteriorates over the coming weeks.

For further information and to see which rules apply to your own particular situation when entering Switzerland, consult the online <u>Travelcheck</u> tool, created by the Swiss Federal Office of Public Health.

How can I get around in Geneva?

The Geneva public transport system is quite efficient and diversified: buses, trams, trains and yellow boat taxis on the lake are available. If you are staying in a hotel, you are entitled to a personal and non-transferable Geneva Transport Card

free of charge, which will allow you to use Geneva's whole public transport system for the length of your stay. Just ask for it at your hotel reception upon arrival.

Should I take a specific health insurance to come to Switzerland?

It is imperative that you familiarise yourself with Switzerland's health regulations, as well as those of any other country through which you may travel, and that you are fully vaccinated against COVID-19. We urge FIATA members to verify that their travel insurance includes COVID-19-related coverage for health care, travel and other related matters.



AT AN INTERNATIONAL CROSSROADS

A TRADING CAPITAL

Geneva is the new home of FIATA's Head Office and will be the host city of the FIATA Headquarters' Meeting in May. Here the canton of Geneva's Department of Economics and Employment shares some of the highlights of this beautiful city, home to many international and non-governmental organisations.

Geneva, the smallest of big cities, is ideally located in the centre of Europe. This international crossroads and bridge between nations and people has a long tradition of being home to many international and nongovernmental organisations, scientific and academic players, civil society organisations and the private sector. The city is thus frequently called 'International Geneva', acknowledging not only its pivotal role in terms of cooperation, but also its position at the forefront of multilateral diplomacy.

The metropolis is proud of this international tradition. It has expanded into the world of business too, with numerous multinationals choosing the city as the location for their headquarters. Moreover, the economy of Geneva is characterised by its diversity. Geneva is not only recognised for its financial sector, specialised in asset management and trade finance, but also for its fine watchmaking and fragrance industries, with their long history here.

Despite having no access to the sea, more than two thirds of the world's finest coffee and cocoa are traded in Switzerland. This apparent paradox is one of Geneva's great strengths. Over the years, Geneva has become the trading capital for agricultural raw materials or 'soft commodities'. Trading in sugar is also a major activity of the Lake Geneva region.

Commodity trading on a global scale

As the city has been a focus for exchange and negotiation for many centuries, it is only natural that it maintains a leading position in the field of the global commodities trade. This dominance is largely due to the dynamism of Geneva's location and the intricate networks that continue to be developed. Numerous trading companies benefit from Geneva's highly skilled workforce and expertise. The vast majority of the big players in international trade have a presence in Geneva. Trading companies also

rely on simple and easy access to stock exchanges and liquidity managers across Geneva. In addition, they are in close contact with the best insurance companies, lawyers, trustees, marine charterers, shipowners and inspection and verification services, as well as major storage firms. Geneva is cosmopolitan, open to the world

and to innovation, which also makes it an ideal location for negotiations and arbitration. The first commercial arbitration took place in Geneva as early as 1866. The Alabama Claim between the US and UK (1869-1872), the most famous international arbitration in diplomatic history, took place in Geneva.

Sustainability is key

Furthermore, the canton of Geneva is fully committed to the implementation of the UN's Sustainable Development Goals (SDGs). It sees its role as not only to apply a panoply of good practices in the canton itself, but also to promote and defend the values of sustainability more broadly.

A special effort is made by the cantonal authorities to support innovation in the environmental sector and to promote the circular economy. Geneva is also recognised in the field of sustainable finance. The canton is a pioneer in this field, with events such as 'Building Bridges', an open and collaborative effort that aims to accelerate the transition to a sustainable financial system. Together, players from these fields have the wherewithal to transform finance by issuing green bonds or climate bonds, to encourage green business.

Assistance, advice and support

The canton of Geneva's directorate general for economic development, research and innovation promotes the economy of Geneva and offers services free of charge to both international and local companies keen to set up and develop their business in Geneva. Its activities focus on three areas.

For local businesses: assistance for existing companies and start-ups, and support and advice in starting and strengthening the activities of local businesses.

For international companies: assistance in setting up and developing activities in the canton, working closely with the best specialists in the regional economy to meet the needs of international companies, and support in obtaining work permits.

Coordination activities: assistance in bringing together economic players in the canton, offering its extensive knowledge of the administration, industry, scientific research centres and service companies in the region.

INTERVIEW

In September 2022 the FIATA World Congress is set to take place in the South Korean city of Busan. FIATA interviewed Mr Krishnan Chelliah, Chair of the FIATA Congress Committee, to hear about how the plans have developed so far.

Ready to welcome FIATA and the world to Busan

As Chair of the FIATA Congress Committee (FCC) and part of the Region Asia-Pacific (RAP), how do you feel about the next FIATA World Congress (FWC) taking place in Busan?

Krishnan Chelliah: I'm very excited to be the FCC Chair for 2022, with a team representing the various FIATA Regions. The 2022 FWC was postponed a few times, due to COVID-19, but we're now moving forward. The new programme emphasises interactive panel discussions, high-profile speakers from international organisations, NGOs and more, with topics that are crucial to freight forwarding, logistics and the supply chain. Our participants should take concrete knowledge back with them. Topics of discussion and speakers for the panel discussions will be decided by FIATA's Institutes and Advisory Bodies.

What value do you see for FIATA members coming to Busan?

KC: We in RAP already held the 2013 FWC in Singapore, in Taipei in 2015, Kuala Lumpur in 2017 and New Delhi in 2018. We're excited, because RAP has some of the fastest-growing economies, with China and India part of our region. We're an important region and as sea freight's cargo volumes shows, the region brings a lot of business into the world. The new Chair of RAP from Indonesia, my friend Mr Nugrahawan, and the Vice Chair from China, Mr Zhimin, are part of our support system. China is taking a keen interest in the FWC, so you can imagine the support FIATA could get from China, with it taking place in RAP. I hope and pray that despite



Krishnan Chelliah, FCC Chair in 2022.

COVID-19, we can give the world a good Congress at the 2022 FWC in Busan.

As the new Committee Chair, what will your role be to ensure the success of the 2022 FWC?

KC: I'm committed to FIATA's aims and am willing to give the best of the knowledge I have. This is my first time as FCC Chair; prior to this I was an Extended Board member and organising Chair for the Kuala Lumpur FWC. Though I've been to many congresses, I never thought that I would one day take on the organising of a congress. At one point, I felt there were some issues to resolve and I wanted to take on the challenge. As the first ever hybrid meeting for a FWC, there are many challenges, but the organisational team, in close collaboration with FIATA Head Office, have done a great job to put together an excellent programme. Even if members cannot travel due to the pandemic, they can still participate online, and be involved in Q&A sessions as if they were in Busan.

As a new Chair I'll also promote a new programme design. If we talk about something that's not relevant, the delegates go home with nothing, so it's important that we have something interesting for everybody in the sessions. They should go home with answers to discuss with their colleagues back home. We want to have focused, real-life topics with solutions that are available to us. For me it's also important that there are no technical hitches and that the FWC runs smoothly as a hybrid event. I also want the gala dinner, which is of great importance, to offer a pleasant experience for participants to enjoy the FIATA family spirit.

After a break from FWCs, and following the FIATA reset programme, what are the main features being introduced?

KC: The reset programme was a real game changer. There were many things put aside and new things that came in. The current Director General is very dynamic, and although he's a quiet man, he gets things done. I really like the way that FIATA has moved on, even shifting from its traditional Zurich environment to international Geneva. We're moving in the right direction, and we're very supportive of the new team there. They all come from different points, in events, communication, legal issues, technology, and bring a variety of skills to achieve FIATA's objectives. Communication that has been added with the reset programme is key without communication, there's no business. We now have the right people to do the right things for FIATA!

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UPCOMING EVENTS

17-20 May 2022 Geneva, Switzerland **FIATA HQ MEETING**

13-16 September 2022 Busan, Republic of Korea FIATA WORLD CONGRESS

CONTACT US FOR MORE INFORMATION:

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Uniting for Global Solutions

All set to welcome you again!

Check the information at FIATA2022.or.kr

The International Federation of Freight Forwarders Association(FIATA), with the Korea
International Freight Forwarders Association(KIFFA), is pleased to announce that
the FIATA World Congress 2022 will take place in Busan, Republic of Korea from 11 to 16 September 2022.



Marine Capital City, Busan

1) Historical

Busan was the capital city during the Korean War, where most heritage of the modern history of Korea remain. Busan Modern History

Museum and UN Peace Memorial Hall are a couple of must-see attractions.

2) Beautiful

Nature Beautiful Nature: Busan has the ocean, mountains, rivers, and hot springs so you can find the beauty and wonder of nature. While walking along Galmaetgil in Busan, for example, you can encounter beauty in each corner.

