



International Chamber of Shipping
Shaping the Future of Shipping for 100 Years

YEARS
100



International Chamber of Shipping 1921–2021

*Shaping the Future of Shipping
for 100 Years*



International Chamber of Shipping

Contents

— A word from the Chairman	4	— 1990–2008 ISM, STCW 95 and the ILO MLC	40
Esben Poulsen, ICS Chairman		Recovery from recession	40
— Supporting global rules for a global industry	8	The IRA bomb	42
Kitack Lim, IMO Secretary-General		A low point in maritime safety	43
— Looking to the future	12	Promoting a global safety culture	44
Emanuele Grimaldi, ICS Chairman-Designate		Overhaul of seafarer training standards	45
— Shaping the future of shipping for 100 years	16	Improving Flag State performance	46
Guy Platten, ICS Secretary General		Decent work for seafarers	47
— 1921–1947 The International Shipping Conference	22	New threats to security	48
The first ICS meeting	22	A new role in shipping and trade policy	49
A new spirit of co-operation	23		
SOLAS is born	24	— 2008–2021 New global challenges	50
Representation with governments	26	The emergence of China	50
— 1947–1961 The International Chamber of Shipping	28	More environmental regulation	50
The Second World War ends	28	Reducing CO ₂ emissions	52
The Cold War	29	New threats to global co-operation	54
IMO is established as a UN agency	30	Preparing for the future	56
— 1961–1990 Representing shipping at IMO	32	— Representing maritime employers	58
ICS achieves IMO consultative status	32	1909–2021 The International Shipping Federation (ISF)	58
Expansion of Port State Control	34	Foundation of ILO	60
Proliferation of new regulations	35	Relations with ITF	61
Growing focus on environmental protection	36		
The first ICS publications	37	— Memories from the ICS archives	64
New ICS responsibilities	38	— ICS Member Associations 2022	80
Responding to the changing profile of the industry	39	— Minutes of the first ICS meeting	82
		— Members associations attending 1921 meeting	89

1921



2021

A word from the Chairman



"There is growing understanding among the public at large of the strategic importance of international shipping and its vital role in keeping world trade moving."

Esben Poulsen, ICS Chairman



I am pleased and very proud to introduce this short publication which has been produced as part of our celebration of the ICS centenary, albeit an anniversary we are marking one year later than intended due to the COVID pandemic.

Anyone like me who has had the good fortune to spend an entire career in shipping will probably be familiar with ICS, even if they may not fully understand or appreciate what it does on behalf of the great industry which it exists to serve.

The same is probably the case for many similarly august institutions, especially those which have been around for 100 years, and whose many beneficiaries may take its activities for granted.

Many people in shipping will have some connection with ICS, if only having referred to its authoritative publications when serving at sea. But the core function of ICS, just as it was when it was first established in 1921, is to provide the industry with a united voice with its global regulators.

It is with a mixture of pleasure and sadness that I write this short introduction. Pleasure because I am so proud to have served as a Chairman of ICS. And sadness because this is one of my final tasks before I hand over the helm to my successor, Emanuele Grimaldi.

The shipping industry today is very different to that which existed when ICS passed its 75th anniversary. Over the past quarter century, with the support of ICS, the industry has made great strides to improve its standards of safety and environmental protection.

ICS is currently leading the industry's collective response to the threat of climate change. As it continues to help shape the future of shipping, ICS is committed to the achievement of net zero emissions by 2050. ICS has also played a crucial role liaising with governments throughout the recent pandemic and has upped its game with respect to the art of communicating with the media and high level policy makers, in addition to those involved with the technical regulation of international ship operations.

With the support of its members, its energetic Secretary General, Guy Platten, and the entire Secretariat team, ICS has recently sought to challenge the assumption that shipping must always be out of sight and out of mind, even if it often lacks a strong political constituency in many countries around the world.



As events in the past few years have demonstrated, there is growing understanding among the public at large of the strategic importance of international shipping and its vital role in keeping world trade moving. It is refreshing to see that most news stories about shipping today actually show pictures of ships unloading their precious cargo, rather than seabirds coated in oil which was too often the case 25 years ago.

While I would like to think that ICS has achieved a lot during the past six years of my own Chairmanship, it focuses the mind when seen in the context of what ICS has achieved during the previous century. One word that runs repeatedly throughout this small book is 'co-operation'. Despite the many geopolitical challenges confronting the world today, I am confident that, within ICS at least, this good co-operation will be sustained.

The history of ICS, and the reason why it has been so effective when liaising with governments at bodies such as the International Maritime Organization (IMO), is the willingness of its member national shipowner associations to co-operate in the best interest of the entire global industry.

Long may this great co-operation continue ■



Supporting global rules for a global industry



"ICS has always been, and remains, one of IMO's greatest supporters, always stressing the importance of global rules for a global industry in the interests of ensuring safety of life at sea and the protection of the marine environment."

Kitack Lim, IMO Secretary-General



I am delighted to extend my warmest congratulations to ICS and all its members as they celebrate their 100th anniversary. A hundred years is a long time indeed for any international institution to have survived with both its original membership and core values intact. The credit is due to the efforts of the membership of ICS as it navigates a constantly evolving and challenging world.

The International Maritime Organization (IMO) and ICS have had a close and longstanding relationship that has stood the test of time. The mutually beneficial relationship has seen relevant and cogent input from ICS in the development and implementation of maritime regulations at IMO.

When ICS was founded in 1921 by its member national shipowners' associations, the maritime world was embarking on a new voyage of international co-operation. The first version of the IMO's SOLAS Convention had recently been adopted as the Treaty of London, and within the framework of the new League of Nations – which eventually was to become the United Nations – governments began to develop the comprehensive framework

of global shipping regulations from which we all continue to benefit under the stewardship of IMO.

Following the establishment of IMO as a United Nations agency and the early meetings of its Member States in London, ICS became the first international shipowners' association to be granted consultative status in 1961. ICS has subsequently participated at virtually every IMO committee meeting, providing expert advice on behalf of the world's shipowners on the implications of just about every IMO Convention, Protocol and regulatory adjustment affecting international shipping, to which governments, as State Parties to IMO treaties, have always afforded close attention. The views of ICS, on behalf of shipowners, are highly valued by IMO Member States in the development and implementation of regulations.

ICS has supported the development of all the principal IMO instruments, including both the first and very latest iterations of the SOLAS, MARPOL and STCW Conventions which, together with the ILO MLC, are acknowledged today as the four key pillars of global maritime regulation. ICS has also been at the forefront of other key IMO developments, such as the adoption, almost 30 years ago, of the ISM Code.

I am particularly appreciative of the effort of ICS during the initial stages of the COVID-19 pandemic to support the development



of solutions to keep maritime trade moving. I am also very encouraged by the commitments which ICS has recently made to assist IMO in its efforts to phase-out greenhouse gas emissions from international shipping as soon as possible.

Above all else, I recognise that ICS has always been, and remains, one of IMO's greatest supporters, always stressing the importance of global rules for a global industry in the interests of ensuring safety of life at sea and the protection of the marine environment, consistent with the famous IMO spirit of co-operation.

On behalf of IMO and its membership, I am delighted to extend my best wishes and congratulations to ICS in its 100th anniversary year and look forward to another century of co-operation ■



Looking to the future



"At the UN Climate Change Conference in Glasgow, in November 2021, ICS committed the shipping industry to net zero carbon emissions by 2050."

Emanuele Grimaldi, ICS Chairman-Designate



International Chamber of Shipping

I am honoured to present this overview of the future priorities of ICS given that, with the agreement of the ICS Board, I will assume the responsibilities of Chairman in the second half of 2022.

As shipowners have learnt all too well during the COVID-19 pandemic, and from the recent terrible events in Ukraine, the future is always far from certain. As the following brief history of ICS demonstrates, the shipping industry has weathered many storms over the past 100 years. And as we move ever deeper into the 21st Century we can confidently predict that there will be a further and massive transformation ahead.

When ICS was established in 1921, the shipping industry was still completing its transition from sail to steam. Today the industry is on the cusp of what ICS has dubbed the Fourth Propulsion Revolution as it moves towards zero-carbon technologies and fuels.

At the UN Climate Change Conference in Glasgow, in November 2021, ICS committed the shipping industry to net zero carbon emissions by 2050. While hydrogen and/or ammonia, produced

from renewable energy sources, are expected to be at the centre of this rapid transition, the jury is still out on the exact form that this transformation is likely to take, or what the pathways for getting there will be.

If the shipping industry is to decarbonise completely within the next 30 years, success will depend on the ability of IMO and its Member States to provide the necessary global regulatory framework. This framework must ensure a smooth transition which does not cause significant disruption to the maritime transportation system, the majority of which now serves economies in developing countries.

Success will also depend on governments, and stakeholders other than shipowners, ensuring that new zero-carbon fuels will be available in ports worldwide on a commercially viable basis. The scale of the ambition involved with this collective endeavour is truly impossible to exaggerate.

Assuming that the immediate political challenges facing the world's leaders can be overcome, maritime transport is almost certainly on a trajectory towards even greater automation and digitalisation. This is expected to play a vital part in allowing shipping to keep the world's economy moving, contributing to a further improvement in global living standards as the world's population continues to grow, projected to peak by 2100 at around 11 billion people.



Most importantly, regardless of new technology and digitalisation, shipping will continue to rely on sufficient numbers of highly trained seafarers. That is why, in 2021, alongside ITF and the UN Global Compact, ICS launched a Just Transition Taskforce. This new initiative will serve to push forward shipping's climate goals while protecting maritime workers from any unintended consequences of the Fourth Propulsion Revolution.

The ongoing pandemic and the fight against climate change have thrown far greater attention onto the strategic importance of shipping, which for many years remained out of sight and out of mind. ICS was established in the aftermath of the First World War when it was clear that the only way for the industry to respond to the challenges it faced at that time was through dialogue and co-operation.

100 years later, much will depend on the longer term implications of momentous events such as the conflict in Ukraine for continuing global co-operation and the maintenance of those international institutions, such as IMO, which have served the shipping industry so well and its ability, in turn, to serve the best interests of the world economy and society as a whole. But I am optimistic and confident in ICS's ability to help the industry to navigate the many challenges that may confront it during the next 100 years.■



Shaping the future of shipping for 100 years



"The unique structure of ICS gives it legitimacy to speak on behalf of the entire global shipping industry."

Guy Platten, ICS Secretary General



With a membership embracing the world's national shipowners' associations, the International Chamber of Shipping (ICS) represents over 80% of the world merchant fleet with its global regulators, including the UN IMO and the International Labour Organization (ILO).

Since 1921, ICS has been the principal global trade association for shipowners and operators, leading representation of one of the world's most strategically vital industries, responsible for transporting about 90% of global trade and providing the life-blood of the world economy.

From its inception 100 years ago, ICS was involved in discussions with governments about the development and maintenance of a global regulatory framework for the conduct of international shipping. Although the term globalisation had not yet been coined, shipping was the very first global industry.

Whether a ship was sailing from Brisbane to Buenos Aires or from St Petersburg to the St Lawrence Seaway, the same rules

needed to apply at both ends of the voyage and the sea leg in between. Otherwise there would be chaos. This led to what may be called the mantra of ICS: global rules for a global industry, which can take full account of the practical realities of operating ships in a harsh ocean environment which entails the management of significant physical risk.

The immediate focus of initial ICS work was helping to ensure the successful implementation of the Safety of Life at Sea (SOLAS) Convention, which had been adopted by governments in response to the *Titanic* disaster in 1912.

Under the banner of what was then called the International Shipping Federation (ISF), ICS also represented maritime employers in the first attempts to establish global standards for working conditions at sea at the ILO, when it was originally part of the United Nations' predecessor, the League of Nations. This is a role which ICS continues to perform today.

Following the establishment of IMO after the Second World War, ICS became the first industry association to be granted the privilege of IMO consultative status, contributing to the development of today's comprehensive global regulatory framework for shipping, with its particular emphasis on safety of life at sea and protection of the marine environment.



Today, IOS is active at all intergovernmental bodies that have an impact on shipping. In addition to IMO and ILO, these include, among many others, the United Nations in New York and its Division for Ocean Affairs and the Law of the Sea (DOALOS), the UN Conference on Trade and Development (UNCTAD), the Organization for Economic Co-operation and Development (OECD) and the World Trade Organization (WTO).

IOS currently has member national shipowners' associations from about 40 countries in Asia, the Americas, Africa and Europe. ICS members represent shipping companies from all sectors and trades operating all types of ship, including bulk carriers, tankers, containerships and passenger vessels. Overseen by a Board of Directors and a network of policy making committees, with active participation from experts appointed by their national associations, the unique structure of IOS gives it legitimacy to speak on behalf of the entire global shipping industry.

For the past 50 years, an increasingly important ICS activity has been the production of publications and best practice guidance with respect to maritime safety, environmental protection and the employment and training of seafarers. These publications are widely referred to throughout the shipping industry and are used on board ships worldwide.



Governments might not always agree with every detail of the positions which ICS advocates on behalf of the global shipping industry. But the views of ICS about the potential implications of regulatory proposals affecting shipowners and their crews have always been respected and valued by policy makers.

ICS enjoys excellent relationships with those governments which share ICS's commitment to continuous improvement of safety, environmental performance and the efficiency of the world's maritime transportation system and that support the critical need to maintain a global regulatory framework for international shipping.

In 2022, as well as responding to implications for shipping of the crisis in Ukraine, the immediate priority of ICS is to help the industry emerge from the global pandemic. But apart from preserving a global regulatory framework for an inherently global industry, and responding to pressing new challenges such as digitalisation of the economy, the greatest long term priority for IOS is to address the overriding challenge of our age – the phase-out of greenhouse gas emissions as soon as possible.

In November 2021, at the UN Climate Change Conference in Glasgow, almost exactly 100 years after ICS's foundation, ICS announced a commitment on behalf of the global industry to a net zero CO₂ emissions target for international shipping.

I think that this demonstrates that IOS remains committed to its mission of helping to shape the future of shipping ■

ICS Summit at UN Climate Change Conference in Glasgow, 2021



1921 - 1947

The International Shipping Conference

"Hardly any international conference, whether of nations, commercial men or representatives of labour, is ever held which does not, either directly or indirectly, deal with questions in which we are all interested – shipping."

Sir Owen Philipps, ICS Chairman 1921–1924

The first ICS meeting

ICS was originally conceived as the International Shipping Conference and can trace its roots to a meeting at the Hotel Victoria, London, in November 1921. An extract from the minutes, at the end of this publication, shows that many of the challenges which confronted shipowners a century ago were very similar to those they continue to face today.

Delegations from 14 national shipowners' associations, travelling of course by ship, attended the first meeting convened by the Chamber of Shipping of the United Kingdom, the UK at that time being the world's predominant shipping power.

A new spirit of co-operation

The foundation of ICS was indicative of the new spirit of international co-operation that followed the trauma of the First World War including the establishment by the Treaty of Versailles in 1919 of the League of Nations – the precursor to the United Nations. But it also resulted from the need for shipowners around the world to help influence and shape, in a co-ordinated manner, the new body of international shipping regulation which was starting to be introduced globally. This is still the core purpose of ICS today.

ICS was also deeply involved with promoting the principle of freedom of the seas, that had formed part of the Treaty of Versailles. This eventually evolved into what has now become the United Nations Convention on the Law of the Sea (UNCLOS).



First official meeting of ICS (November 1921)

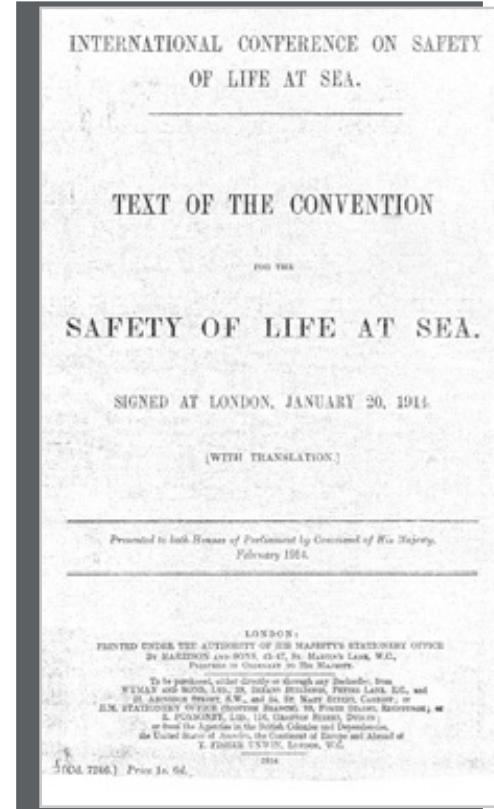


SOLAS is born

In January 1914, following a ground-breaking Diplomatic Conference of governments in London, the first Safety of Life at Sea Convention (SOLAS) had been adopted. This was prompted by the loss of 1,500 lives during the *Titanic* disaster of 1912 which, while not the largest loss of life from a maritime casualty in peace time (over 4,000 lost their lives during the *Doña Paz* ferry tragedy of 1987), was instrumental in the creation of SOLAS.

Because of the First World War, the first iteration of SOLAS never entered into force. But much of the early work of ICS was dedicated to the implementation and updating of SOLAS, and ICS was heavily involved in the first major revision of the SOLAS Convention in 1929. Following its entry into force in 1932, SOLAS became one of the earliest examples of truly global regulation for an entire global industry which was implemented and enforced worldwide.

Throughout the 1920s, ICS members set up a number of committees to carry into effect the general principles agreed at its first meetings. This included work on deck cargoes, load lines, lifesaving appliances, 'wireless telegraphy' and taxation of shipping earnings, issues which remain central to the work of ICS.



Original copy of the SOLAS Convention

109
International
Shipping Federation
established

14
— SOLAS adopted
— Panama Canal opens
— First World War

19
— League of Nations
established in Geneva
— ILO established

20
— First ILO Maritime Labour
Conference

21
— First ICS meeting

23
— World Ports Convention
adopted by League of
Nations

Representation with governments

Because of the logistics involved in travelling to London (this was before the time of commercial aviation), ICS members initially met infrequently as occasion and need demanded. But ICS's responsibility for representing the industry to governments at international Diplomatic Conferences affecting ship operations steadily began to grow.

Other important ICS work at this time included preparation for meetings at the League of Nations, in Geneva, which led to the adoption in 1923 of the Maritime Ports Convention, which codified the essential principle that ships should be allowed freedom of access to all ports worldwide and should not be discriminated against on the basis of their flag. ICS was also present at the League of Nations World Economic Conferences of 1927 and 1933, the precursor to the first General Agreement on Tariffs and Trade (GATT) which was adopted in 1947.



Messageuries maritimes poster, 1939, by Louis-Robert Antral,
courtesy Bibliothèque nationale de France



World Economic Conference

Second version of SOLAS

SOLAS enters into force

Second World Economic Conference

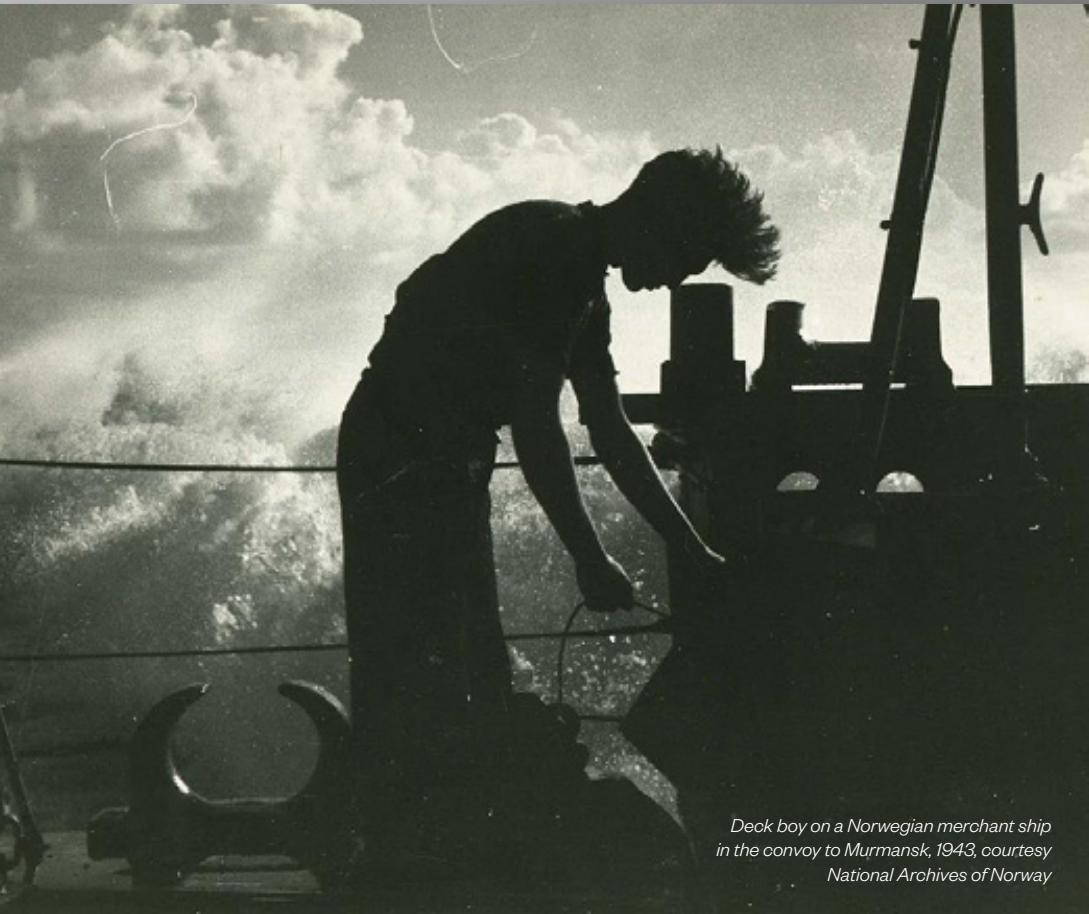
ILO Hours of Work and Manning (Sea) Convention

Second World War

United Nations established

1947 - 1961

The International Chamber of Shipping



Cargo ship 1950s, courtesy of Royal Association of Netherlands Shipowners



In 1948, ICS members decided to change the association's name from the International Shipping Conference to the International Chamber of Shipping to avoid confusion with international liner shipping conferences which, before the onset of modern competition regulation, had a significant role in determining maritime freight rates.

The Cold War

With the advent of the Cold War, ICS adopted new rules which until 1991 prohibited membership from communist countries. However, shipowner representatives from the Soviet Union and the People's Republic of China were routinely invited to attend ICS technical committee meetings as observers, in recognition of the important role these shipping nations played in what was already a global industry, which had to agree and operate to common technical standards.

The Second World War ends

ICS meetings were suspended during the Second World War when hundreds of thousands of merchant seafarers lost their lives on both the Allied and Axis sides, with the Battle of the Atlantic and the Arctic convoys being pivotal to the eventual Allied victory. ICS members next reconvened in London in 1947.

Ship at port 1950s, courtesy of Finnish Shipowners' Association





1959 IMO Assembly, courtesy IMO



1948 IMO Council, courtesy IMO

IMO is established as a UN agency

1948 was also significant because it was the year in which the International Maritime Organization (IMO) was first established by a United Nations treaty, originally as the Intergovernmental Maritime Consultative Organization (IMCO).

The IMO Convention, adopted by the UN in Geneva, finally entered into force in 1958, with the first meeting of IMO Member States held in London the following year. Early IMO meetings were held in Piccadilly (now the location of the Japanese embassy to the United Kingdom). These early meetings led to the adoption of a further revision of SOLAS in 1960, the outcome of which ICS sought to influence via co-ordinated representations between ICS members and their respective governments. Throughout this time, as they continue to do today, representatives of ICS national associations formed part of government delegations at IMO meetings.

47

- ICS reconvenes
General Agreement on Tariffs and Trade (GATT)

48

- ICS renamed
- IMO established as IMCO
- SOLAS revised
- ITF launches 'Flag of Convenience' campaign

56

- Suez Crisis

58

- UN Convention on the High Seas
- IMO Convention enters into force
- ILO Joint Maritime Commission establishes Minimum Wage for seafarers

59

- IMO (IMCO) holds first meeting of Member States

60

- SOLAS revised by IMO



Mr. William Graham, IMO Secretary-General from 1961-1963
and Miss Armstrong, IMCO Librarian, courtesy IMO

1961 - 1990

Representing shipping at IMO



ICS achieves IMO consultative status

In 1961, ICS became the first non-governmental organisation to be granted consultative status at IMO (along with the International Chamber of Commerce (ICC)). The core function of ICS thus increasingly became the co-ordination and representation of the global industry's views at IMO meetings, which have subsequently developed the comprehensive IMO regulatory framework which today governs all aspects of international ship operations.

Although ICS did not enjoy voting rights, ICS was now entitled to speak on any issue at IMO meetings in order to help governments understand the technical implications of the decisions they were making.

As well as speaking for the industry at IMO Diplomatic Conferences which adopted new Conventions and Protocols, the need to successfully influence outcomes to ensure sound regulation of shipping required active participation by ICS at virtually every IMO committee and technical sub-committee meeting. The number and frequency of these IMO meetings gradually increased to the point that by 1982, when the UN agency moved to its current headquarters at Albert Embankment, IMO was almost in permanent session. Indeed, many governments by this time chose to appoint full time maritime attachés working from their London embassies.

The main focus of IMO, and therefore of ICS, in the 1960s, was the further development of technical regulations related to safety of life at sea. This included the Load Lines Convention in 1966, and the Convention on International Regulations for Preventing Collisions at Sea (COLREGS) in 1972 which amended the rules first adopted by IMO in 1960 and made compliance with traffic separation schemes mandatory.



IMO headquarters London, courtesy IMO

Other important IMO Conventions adopted at this time include the IMO Facilitation Convention (FAL) in 1965, which sought to standardise and minimise documentary procedures when ships trade to foreign ports, and the Tonnage Convention of 1969 which successfully introduced a universal measurement system including the current use of the metric of Gross Tonnage.



The George Lyras in Sydney harbour, 1980s

Expansion of Port State Control

A very significant development, in 1974, was the adoption by IMO of the current version of SOLAS, which embedded the concept of 'no more favourable treatment' into the revised Convention. This is the principle whereby any nation that has ratified an IMO regulation which has entered into force globally can inspect visiting ships for compliance, even if the flag State of the vessel has not ratified the relevant Convention or Protocol. The same principle now applies to nearly all IMO Conventions, as well as what became the main ILO Convention governing maritime employment standards (ILO Convention No. 147) adopted in 1976, which has since been replaced by the ILO Maritime Labour Convention.

The concept of 'no more favourable treatment', and the importance of maintaining a level playing field so that sub-standard ships cannot gain an unfair competitive advantage, also led to the development of what is now a sophisticated global system of Port State Control (PSC). This as an adjunct to enforcement of IMO standards by the flag State of a vessel, whereby every national PSC authority has access to comprehensive data about previous inspections of any visiting ship, which have been conducted by other PSC authorities around the world, allowing them to target inspections.

This impressive global system for enforcing compliance with IMO and ILO rules gained further momentum in 1981 with national PSC authorities in the North Atlantic region signing the Paris Memorandum of Understanding (MOU) on Port State Control. This was followed in 1993 by the Tokyo MOU covering the Asia Pacific, which, together with the system operated by the United States Coast Guard is now complemented by similar co-operative arrangements covering every region worldwide, making it almost impossible for sub-standard ships to trade without being detected. ICS participates in Paris and Tokyo MOU meetings by virtue of being an ILO social partner.

Proliferation of new regulations

The 1974 version of SOLAS was also important because it introduced the 'tacit acceptance' procedure, which meant that significant changes and additions to IMO rules could be agreed by IMO Member States without the need to hold a formal Diplomatic Conference to adopt an entirely new Convention. This greatly increased the speed and efficiency with which IMO could react to the need to make changes, reducing the time required for new rules to enter into force globally. However, it also significantly increased the need for ICS to respond to regulatory proposals from governments at IMO, the number and frequency of which created an expanding administrative burden with which ships and their crews, as well as many maritime administrations, sometimes struggled to keep up.



1961

ICS granted IMO
consultative status

65

IMO Facilitation
Convention adopted

66

IMO Load Line
Convention adopted

67

— Torrey Canyon oil spill
— Closure of Suez Canal

69

IMO Civil Liability
Convention adopted

71

International Oil Pollution
Compensation Fund
agreed

Growing focus on environmental protection

The size of ships, especially tankers, dramatically increased throughout the 1960s and 1970s. The reaction to the *Torrey Canyon* oil tanker spill off the UK coast in 1967 greatly increased awareness of the potential impact of ships on the marine environment, and the agenda of governments at IMO increasingly became more focused on environmental protection, in addition to the safety of life at sea.

Most importantly, this led to adoption of the International Convention on the Protection of Pollution from Ships (MARPOL) in 1973, and ICS was active throughout these negotiations. At the same time, IMO also adopted separate Conventions establishing an innovative and impressive global compensation regime for oil spills, financed jointly by the shipping and oil industries. Thanks to the latest versions of the International Convention on Civil Liability for Oil Pollution Damage and the International Fund for Compensation for Oil Pollution Damage, around US\$ 1 billion is now available, regardless of fault, to compensate those affected by any single oil pollution incident.

Whilst the protection of safety of life at sea has continued to be ICS's greatest priority, as a result of this growing shift to environmental protection ICS has also become increasingly involved in environmental, legal and insurance issues, including close liaison with the insurance industry, in particular the International Group of P&I Clubs whose members provide mutual third party liability cover to shipowners.

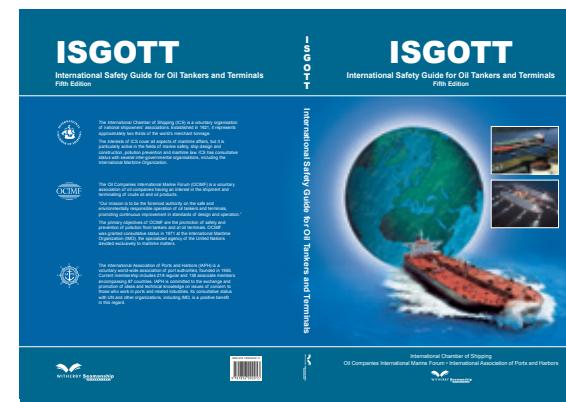
172
— COLREGS adopted

73
— MARPOL adopted
— Oil price crisis

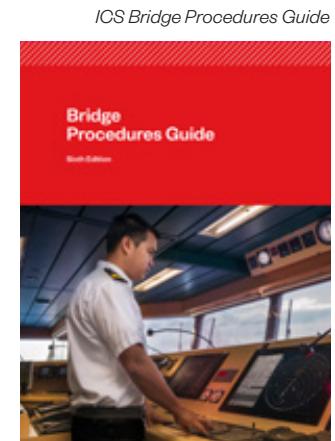
74
— SOLAS updated to include tacit acceptance procedure

The first ICS publications

During this period, ICS also became responsible for the production and regular revision of a series of publications on industry best practice and regulatory compliance, the latest editions of which continue to be widely used and respected throughout the industry worldwide. During the 1970s, these included the first editions of the *International Safety Guide for Oil Tankers and Terminals* (ISGOTT), produced jointly with the oil industry, and the *ICS Bridge Procedures Guide*, a copy of which is still carried on board most commercial ships trading internationally.



ICS/OCIMF/IAPH International Safety Guide for Oil Tankers and Terminals (ISGOTT)



ICS Bridge Procedures Guide

75
— Suez Canal reopens

76
— ILO Merchant Seamen (Minimum Standards) Convention, ILO 147

— First ICS Bridge Procedures Guide

New ICS responsibilities

Throughout the 1970s, ICS also began to take on broader responsibilities. These included liaison with the operators of the world's most important international waterways, the Suez Canal Authority (SCA) and what was then the U.S. controlled Panama Canal Commission. In the 1970s, ICS established close ties with the SOA following the Suez Canal's reopening in 1975 (having been closed since 1967). ICS also represented the industry's interests in the run up to the US handover of the Panama Canal in 1999 and continues to enjoy good relations with what is now the Panama Canal Authority (ACP).

Less positively, ICS found it necessary to become increasingly involved in security issues during the 1980s, liaising with military navies providing protection to shipping during the Iran-Iraq war, during which many tankers and seafarers' lives were lost. ICS also developed its contact with customs authorities via the World Customs Organization (WCO), as more and more ships became unwittingly exploited by drug smugglers.



Stamp commemorating the reopening of the Suez canal circa 1975, Shutterstock

Throughout this decade, ICS also developed a close relationship with the United Nations High Commissioner for Refugees (UNHCR) due to the responsibilities which merchant ships had to assume for rescuing Vietnamese boat people, refugees fleeing from the aftermath of the Vietnam War.

Responding to the changing profile of the industry

During this period, the membership of ICS gradually expanded from its original base of so-called 'traditional' maritime countries, as did the number of IMO Member States. This reflected a paradigm shift in the structure of the industry due to the increasingly global character of the maritime sector, the movement of the centre of gravity of ship ownership towards Asia, and the increasing use of open registers – the use of which grew significantly during the major shipping recession which lasted throughout most of the 1970s and 1980s.

As a response to these changes to the structure of industry, including the dramatic decline of the British merchant fleet, the members of ICS decided to establish an independent secretariat. Since 1991, the Secretariat of ICS has been provided by Maritime International Secretariat Services Limited (Marisec), a separate company, wholly owned by ICS. However, ICS continued to be located within the offices of the UK Chamber of Shipping until 2011.

In 1990, it was also decided to combine the ICS membership and secretariat with that of the International Shipping Federation (ISF) although ISF retained its separate identity as an employer's federation until a full merger was completed with ICS in 2011.

178

- STCW Convention adopted
- Amoco Cadiz oil spill

80

— Start of Iran-Iraq war

81

— Paris MOU on Port State Control established

82

- UNCLOS adopted
- IMCO changes name to IMO
- IMO HQ moves to Albert Embankment London
- ICS publishes Code of Good Ship Management Practice

83

— MARPOL 73/78 enters into force

87

- Herald of Free Enterprise ferry disaster
- Doña Paz ferry disaster

89

— Exxon Valdez oil spill

1990 - 2008

ISM, STCW 95 and the ILO MLC



Recovery from recession

The years preceding the 1990s had been characterised by a deep and prolonged recession within the global shipping industry with massive over production by shipyards in the 1970s resulting in too many ships chasing too few cargoes. The recession also contributed to a major decline in shipbuilding in Europe and the United States, so that by the end of the 20th century, about 90% of the shipping tonnage was constructed in just three nations: China, Japan and South Korea.

The causes of this major shipping recession are complex, but it was triggered by the oil price shock of 1974 (when an oil embargo by Arab States caused a 400% increase in oil prices). This was exacerbated by the reopening of the Suez Canal in 1975 which restored the ability of ships to avoid the longer route via the Cape of Good Hope, further reducing global demand for shipping tonnage, contributing to serious over capacity.

But overcapacity also reflected other major changes within the industry, such as the rapid containerisation of scheduled liner services. While shipping markets had always been cyclical, shipping companies



now also had to contend with far greater competition than in previous decades, as more nations sought to establish their shipping companies to carry their own cargoes. In the years preceding the end of the Cold War, international shipping markets also saw an influx of state-owned Soviet bloc tonnage, operating below cost to generate foreign currency.

Shipping was also faced with greater freight rate volatility following the end of the Bretton Woods System of fixed exchange rates in the 1970s and the liberalisation of much the wider global economy in the 1980s, including energy and commodity markets.

But following the collapse of the Soviet Union in 1991, globalisation was given fresh momentum by the successful conclusion of the Uruguay Round of the General Agreement on Tariffs and Trade (GATT) and the establishment of the World Trade Organization (WTO) in 1995. This provided new and improved trading opportunities, slowly helping the shipping industry to emerge from recession, a recovery which was then given real momentum when China joined the WTO in 2001.



Damage from the Baltic Exchange bombing, 1992



Her Majesty Queen Elizabeth II being presented to Mr and Mrs Horrocks (ICS Secretary General)

The IRA bomb

In 1992, a bomb planted by Irish Republican Army terrorists, the largest to be detonated in the City of London since the Second World War, completely destroyed the Baltic Exchange and the adjacent offices of the UK Chamber of Shipping and ICS at 30/32 St Mary Axe. Three people were killed in the explosion, and 91 were injured including the caretaker of the UK Chamber/ICS offices. The iconic 'Gherkin' tower now sits on the site of the original Baltic Exchange.

ICS moved to temporary offices at 2/5 Minories until 1994 when ICS, together with the UK Chamber, took up residence in new offices in Carthusian Court, which were opened by Queen Elizabeth II.

A low point in maritime safety

During the 1990s, the shipping industry gradually emerged from its long recession which had started in the 1970s and the world fleet continued to grow in response to an expanding global population and further improvements in global living standards. Positive developments, such as the establishment of the WTO, stimulated the removal of trade barriers, further increasing demand for shipping. But amid the beginning of this gradual economic recovery, ICS had to respond to the increasing demand from governments for a far more systematic approach to maritime safety and pollution prevention.

Government frustration with the industry's safety record was not helped by a spate of high profile incidents involving significant loss of life or serious pollution. These included the infamous *Exxon Valdez* oil spill off Alaska in 1989 and three major passenger ferry disasters in which hundreds of lives were lost: the capsizing of the *Herald of Free Enterprise* off Belgium in 1987, the fire on board the *Scandinavian Star* off Norway in 1990, and the loss of the ferry *Estonia* in the Baltic Sea in 1994. This period also saw the worst ever peacetime maritime casualty, the loss in 1987 of the ferry *Doña Pas* resulted with the tragic loss of over 4,000 lives. Throughout the 1980s and 1990s, a large number of dry bulk carriers, and the lives of hundreds of seafarers, had also

190

- First ICS/BIMCO global manpower survey
- Fire on Scandinavian Star
- End of Cold War

91

- ICS establishes independent secretariat (MARISEC)

92

- "Double hull tanker" amendments to MARPOL
- IMO establishes Flag State Implementation Sub-Committee
- ICS St Mary Axe office destroyed by IRA bomb
- ICS calls for revision of STCW Convention

93

- ISM Code adopted
- European Union established

94

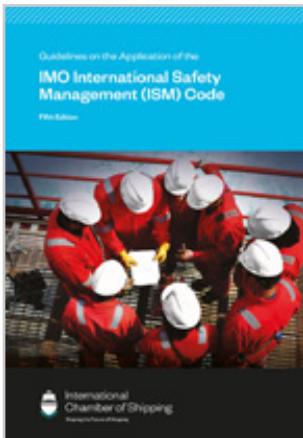
- Estonia ferry disaster

95

- STCW 95 adopted
- WTO established

been lost due to fundamental flaws in ship design and construction standards plus serious failures in regulatory oversight when ships were being loaded.

The reputation of the industry with regulators sank to what was probably an all time low with two major oil spills off the coast of Northwest Europe – the *Erika* in 1999 and the *Prestige* in 2002 – both of which caused serious damage to the Spanish and French coastlines. Unfortunately for the industry, following the establishment of the European Union in 1993, this coincided with an increasing appetite on the part of the European Commission to assert its new power on maritime issues and seek to regulate shipping on a regional basis, putting it into conflict with the global regime agreed by governments at IMO on what was to be the first of many occasions.



Promoting a global safety culture

The turn-around of the industry's performance, and the restoration of confidence among policy makers, arguably began with the adoption by IMO of the International Safety Management (ISM) Code, which embraced the concept of continuous improvement in operational performance. Every aspect of a ship's operations and its

management ashore by shipping companies became subject to rigorous processes of both internal and external auditing. Shipping companies, in effect, were now required to have a global licence to operate. The philosophy underpinning the ISM Code was actually in large part derived from the *Code of Good Management Practice in Safe Ship Operation*, developed by ICS in 1982.

This new ISM regime was adopted by IMO as part of the SOLAS Convention in 1993 and became mandatory for all ships worldwide by 2002, with a new requirement to implement audited Safety Management Systems initially becoming mandatory for certain ship types in 1998. ICS played a significant part in the successful introduction of the ISM Code through the definitive guidance which it developed for shipping companies, many of whom were then unfamiliar with the systematic approach to safety culture which is now taken for granted throughout the global industry. The ICS *Guidelines on the Application of the IMO ISM Code* are still published and in circulation today.

Overhaul of seafarer training standards

As a response to the deep and prolonged shipping recession, the years leading up to the 1990s had also witnessed a massive expansion in the employment of seafarers from developing nations, which led to growing concerns about whether confidence could be placed in the overall standards of seafarer certification and qualification.

In the early 1990s, at the request of its members, ICS played a major role in the overhaul of global seafarer training standards by calling for the revision of the

197

MARPOL Annex VI
on Prevention of Air
Pollution from Ships

Kyoto Protocol on
Climate Change

99

Global Maritime
Distress and Safety
System (GMDSS) fully
operational

Erika oil spill

200

Handover of Panama
Canal

01

Attack on World Trade
Centre

02

International Ship and
Port Facility Security
(ISPS) Code adopted

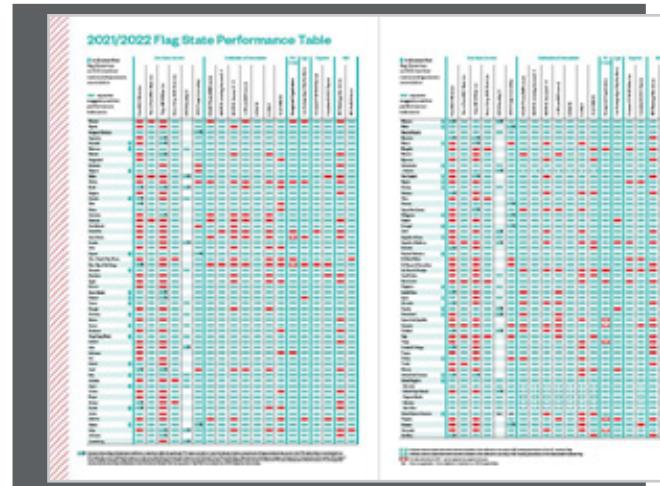
ICS merges with CENSA

Prestige oil spill

IMO Convention on Standards of Training, Certification and Watchkeeping (STCW) which had first been adopted in 1978. The radically revised Convention, in which ICS played a central role in helping to draft, became known as STCW 95. In combination with the implementation of the ISM Code, as well improvements with ship technology, the full implementation of STCW 95 correlated with a significant reduction in the number of serious maritime casualties and major oil spills by the first decade of the 21st century, despite the massive growth in maritime trade in the period leading up to the 2008 financial crisis.

Improving Flag State performance

Following the increasing use by shipping companies in the 1980s of open registers, whereby a ship is registered in a nation that is different to the country of ownership, there was also growing concern as to whether the increasing number of Flag State Administrations, with little previous experience of shipping, were taking their responsibilities towards the enforcement of maritime safety seriously (as opposed to simply collecting registration fees). The scale of the problem was revealed by maritime casualty data and the growing sophistication of Port State Control statistics which clearly identified that ships using certain flags were far more likely to have serious deficiencies.



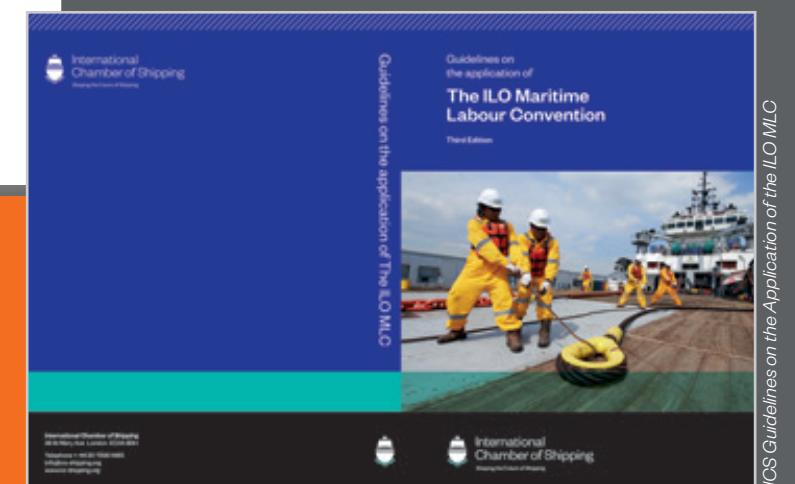
ICS Flag State Performance Table

In response to this concern, ICS published the first iteration of its Flag State Performance Table in the early 2000s, which put pressure on shipowners to think carefully about their choice of flag and which acted as an encouragement to flag administrations to avoid cutting corners and prevent damage to their reputations. In combination with the development of the IMO Member State Audit Scheme, which ICS fully supported, and the increasing sophistication of Port State Control targeting, the performance of substandard Flag States dramatically improved. Today there is no longer any meaningful distinction to be made between the performance of ships using open registers (which today control the majority of global shipping tonnage) and so-called traditional or national flags.

Decent work for seafarers

The other significant achievement of ICS in this period (under the banner of ISF) was the tripartite negotiation at the ILO in Geneva, with governments and the International Transport Workers' Federation (ITF) representing seafarers' unions, which led to the adoption of the ILO Maritime Labour Convention (MLC) in 2006.

Following its entry into force in 2013, the ILO MLC now provides detailed global standards for virtually all aspects of maritime employment, ranging from hours of work and seafarers' health and welfare to employment contracts, the use of



ICS Guidelines on the Application of the ILO MLC

crewing agencies and standards of crew accommodation. These ILO requirements are now strictly enforced on a global basis, and are seen by the ILO as a model for ensuring high standards of employment which normally far exceed those in comparable shore based industries.

New threats to security

Despite the end of the Cold War in the early 1990s, ICS increasingly had to become engaged with helping the industry to address new security challenges, particularly following the Al Qaeda attack on the United States in 2001 which suddenly created a new fear among governments that ships could be used to facilitate acts of terrorism. At the request of the United States, this led to the rapid introduction, as a requirement under the SOLAS Convention, of the International Ship and Port Facility Security (ISPS) Code, as well as onerous changes to customs regulations worldwide.

Whilst piracy and armed robbery at sea had always presented a perennial danger for ships and their crews, particularly in West Africa and Southeast Asia, the incidence of piracy reached an unprecedented level over a five year period from 2008 onwards when over 4,000 seafarers were held hostage for ransom by Somali pirates, with many being brutally murdered. In co-operation with military navies that provided protection in the Indian Ocean, ICS played a central role in drawing the attention of governments to the seriousness of the crisis and the development of best practice measures to be followed by shipping companies to prevent the worst consequences of these violent attacks at sea.



A new role in shipping and trade policy

In 2002, ICS merged with the Council of European and Japanese Shipowners' Associations (CENSA), taking over responsibility for global industry representation on trade and shipping policy issues. During the 1980s, under the banner of CENSA, ICS had been heavily involved in the negotiations preceding the adoption of the UNCTAD Liner Code, which sought to introduce cargo reservation for ships flying the flag of the import or export country. This flew in the face of recent efforts to codify free trade principles for shipping. However, partly as a result of ICS members' lobbying of governments, the UNCTAD Liner Code never entered into force.

As a consequence of the merger with CENSA, the number of intergovernmental bodies with which ICS liaised increased considerably, including the Organization for Economic Co-operation and Development in Paris, where ICS sat on its Maritime Transport Committee, and the Consultative Shipping Group (CSG) which comprises governments committed to free trade principles for shipping.

ICS also became responsible for liaison with the World Trade Organization (WTO) on the inclusion of maritime services within the Doha round of its multilateral trade negotiations on global trade rules, from which shipping had been excluded following the conclusion of the Uruguay Round of the GATT in 1994. ICS also assumed new responsibilities for liaising with governments about the increasing application of general competition regulation to shipping, which led among other things to the EU prohibition of liner conferences in 2008.

1990



2008

2008 - 2021

New global challenges



The emergence of China

The notable improvement in the quality of international shipping in the 2000s was undoubtedly assisted by the recovery of freight rates, which reached dizzying heights until the global economic downturn which followed the 2008 financial crisis.

The depth of the collapse of freight rates in 2009 was made worse by the massive over ordering of new ships in the years immediately before the bubble burst. But by the second half of the next decade, freight rates in most sectors of the industry had sufficiently recovered to allow most shipping companies to be profitable again. However, this recovery was primarily supported by the seemingly inexorable increase in demand for maritime services from China, due to the rapid growth of its exports and its insatiable demand for energy and raw materials. Indeed, the majority of maritime trade today now serves the economies of developing nations and has contributed greatly to moving billions of people out of poverty.

More environmental regulation

In the first two decades of the 21st century, ICS increasingly had to respond to IMO's further growing focus on environmental protection issues and the regulation of virtually every activity on board ship that

*Oceanbird, the wind powered cargo vessel,
courtesy International Windship Association.*



might affect its environmental performance. Since its adoption in 1974, the MARPOL Convention has been expanded to address almost every type of ship source pollution and the appetite for additional regulation was given further impetus by the adoption of the United Nations Sustainable Development Goals in 2015.

In addition to further measures to prevent oil pollution, including the phase-out of single hull tankers by 2010, huge effort was expended on addressing concerns about the unwitting movement in ships' ballast water of invasive species that can damage local ecosystems. This led to the adoption of the IMO Ballast Water Management

Convention in 2004, which precipitated years of serious implementation problems, which ICS had to help the industry and governments resolve prior to the Convention's eventual entry into force in 2017. This was further complicated by the unilateral introduction of regulations by the United States at variance to those agreed at IMO.

ICS was also heavily involved in setting standards for the disposal of redundant tonnage by ship recycling yards which are predominantly

located in developing countries. An ICS Code of Practice formed the basis of the IMO (Hong Kong) Ship Recycling Convention adopted in 2009, although this has not yet entered into force prompting further unilateral action by the European Union.

Meanwhile, a growing proportion of ICS resources had to be dedicated to ensuring workable outcomes during IMO discussions to address air emissions from ships. In 2020, this led, as part of the MARPOL Convention, to the full implementation of the IMO global cap on the sulphur content of marine fuel. This meant an end to the use of the low cost residual fuel which most of the industry had been using since the 1960s, whilst creating significant operational challenges for ship operators and the bunker supply industry. However, because it coincided with the COVID-19 pandemic, the seamless implementation of this overnight transition to the use of cleaner fuels by ships passed more or less unnoticed outside of the industry.

Reducing CO₂ emissions

Although discussions at IMO had started earlier, by the 2010s a large amount of ICS's work needed to be focused on addressing pressure on the shipping industry to reduce its greenhouse gas emissions generated by the consumption of marine fuel. This included ICS participation at the annual summits of the United Nations Framework Convention on Climate Change (UNFCCC) following the adoption of the Kyoto Protocol in 1997.

ICS became deeply engaged in efforts by IMO to regulate the reduction of greenhouse gases within this international transportation sector, which is not directly covered by the commitments which governments made under the 2015 Paris Agreement on Climate Change with respect to the rest of the global economy. Although shipping is by far the most carbon efficient form of commercial transport, in 2020 it was collectively responsible for about 2% of the world economy's total CO₂ emissions and the political pressure to phase-out its emissions completely is considerable.

ICS has contributed significantly to the development of regulatory measures to help reduce shipping's emissions. This included the adoption in 2011 of IMO rules to increase the carbon efficiency of new ships, which were the first ever to be adopted globally for application to an entire industrial sector. In response to the 2015 Paris Agreement, ICS played a crucial role in persuading IMO Member States to develop an ambitious greenhouse gas reduction strategy, which was adopted as the IMO Initial GHG Strategy in 2018. In 2020, ICS also helped to broker an agreement between IMO Member States (despite the suspension of IMO meetings due to COVID) on new rules under the MARPOL Convention to reduce the carbon intensity of the existing fleet, so that shipping should be on track to improve its efficiency, as an average across the global fleet, by at least 40% by 2030 compared to 2008.

However, governments continue to expect more, and in 2021 ICS took the bold step of committing international shipping to a net zero CO₂ emissions target by 2050. With other industry associations, ICS also put forward a radical proposal for the establishment of US\$5 billion



R&D fund, to be paid for by the industry, to accelerate the development of zero-carbon technologies and fuels, as well as giving support for a global carbon price to be applied to shipping as soon as possible to close the price gap between conventional and zero-carbon fuels and to help expedite the transition.

New threats to global co-operation

The first decade of the 21st century saw progress towards an ever more globalised economy and the removal of trade barriers, under the auspices of the WTO, which led to a rapid further expansion of maritime trade. This was supported by the very effective global regulatory framework for shipping provided by IMO which had contributed towards the development of safer and more efficient maritime transportation system which no longer tolerated sub-standard ships.

However, following the 2008 financial crisis there has been a definite erosion of confidence in the global institutions which have served the world economy since the end of the Second World War. There has been a decline in support for the work of the WTO where progress on a new global trade deal has in effect been suspended, and the gradual re-introduction by individual governments of protectionist measures which hamper free and fair access to international markets. More generally there has been a decline in support for the concept of multilateralism, a concerning development given the need for inherently global industries such as shipping to be regulated at a global level.

The effectiveness of IMO as shipping's global regulator has also been placed under strain. In part, this has been due to the emergence of regional political blocs such as the European Union, which has led to a politicization of discussion at IMO, with decisions no longer always taken on the basis of their technical merits.

The agenda of IMO has also been increasingly dominated by the need to address climate change, an issue on which, at the UNFCCC, the views of different governments are often polarised. This state of affairs has consequently reduced the ability of IMO to achieve consensus on important issues, increasing the possibility of regional regulation.

This danger was encapsulated by the European Commission's proposal in 2019 to unilaterally apply its CO₂ emissions trading system (EU ETS) to international shipping, thereby undermining negotiations at IMO and risking a breakdown of a global regime for tackling greenhouse gas emissions from shipping. Regional initiatives such as these risk the emergence of a chaotic web of piecemeal local regulations, which ultimately may prove far less effective at achieving the rapid reductions in CO₂ emissions from shipping globally which the climate emergency demands.



Preparing for the future

 By the third decade of the 21st century, war in the Middle East and instability in Africa have created new challenges for ICS. Since the middle of the 2010s, ICS has played a significant role liaising with the relevant UN and EU agencies and helping shipping companies to respond to the Mediterranean migrant crisis, as hundreds of thousands of people sought to make the dangerous sea crossing from Africa to Europe, often in unseaworthy boats. Meeting their obligation under the SOLAS Convention to come to the aid of anyone in distress at sea, merchant ships saved the lives of over 40,000 people (although a similar number are thought to have perished, often at the mercy of ruthless people smugglers).

In 2020, the world and the shipping industry faced another unexpected challenge, the COVID-19 pandemic and the resulting crew change crisis. Throughout the pandemic, the industry has managed to keep the world economy moving, and ICS was effective in persuading governments of the importance of allowing maritime trade to continue. However, despite concerted efforts, ICS has struggled to persuade governments to remove the draconian restrictions introduced by local health authorities on the movement of ships' crews and their repatriation to their home countries. It may be some time yet before these restrictions are fully removed worldwide.

Similarly, at the time of writing, war has just broken out between the Russian Federation and Ukraine and tension is also increasing between the United States and China in the South China Sea. None of these

potentially seismic geopolitical events bode well for the preservation of rules-based global order, and no doubt the implications of these events will be felt long into the coming decades.

Looking ahead, it will be crucial that the shipping industry, and bodies such as IMO, can rise to these new challenges, maintaining the spirit of international co-operation which has marked the first 100 years of ICS's history. The shipping industry depends on such co-operation to operate safely and efficiently, and as the representative of the industry, there is much work for ICS to do in helping to shape the future of shipping.



Representing maritime employers



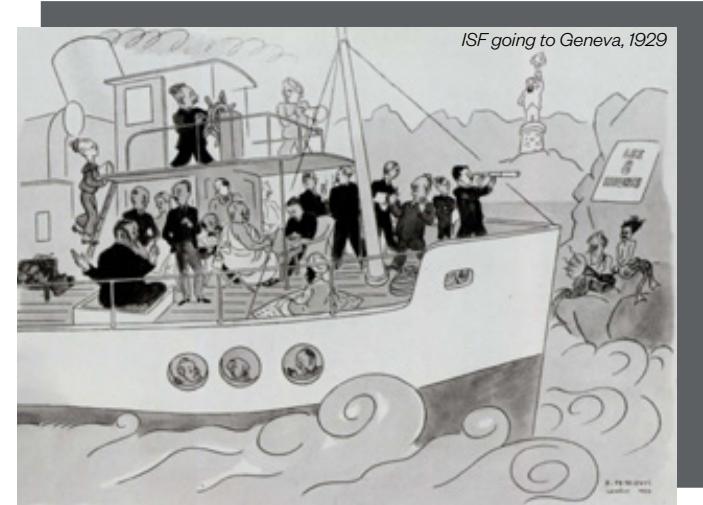
**The International
Shipping
Federation (ISF)**

In addition to being the leading global trade association for shipowners on regulatory issues, ICS has also had a longstanding role as the world's principal maritime employers' organisation concerned with industrial relations and the training and competence standards of the world's two million seafarers.

Since 2011, ICS has fully absorbed the responsibilities of what used to be called the International Shipping Federation (ISF), whose history actually predates ICS having been established in 1909. ICS is therefore also responsible for the negotiation of employment regulations adopted by the ILO. As such, ICS is the official social partner of its seafarers' trade union counterpart, the International Transport Workers' Federation (ITF).



Strike in Liverpool, 1911



Following their formal merger, ICS and ISF have ceased to have separate identities, although they had already combined their memberships and secretariats in 1991 (a process started in 1975 by the merger of the UK Chamber and the British Shipping Federation which had originally provided the separate ICS and ISF secretariats). However, the name of ISF still lives on in the ISF Watchkeeper seafarer's workhour record keeping software, which is currently used by thousands of ships worldwide.

ISF was originally conceived as a strike-breaking organisation in response to the growth of organised labour and seafarers' trade unions in the early 1900s, ITF having been founded in 1898. However, it was not until the 1920s, following the establishment of the International Labour Organization (ILO) in 1919, that ISF really took on its present identity.



*First ILO
Maritime
Conference
Genoa
15 June–10 July
1920*

Foundation of ILO

ILO was established by the League of Nations in 1919 to develop international employment standards. Uniquely, due to concerns at that time about Bolshevik revolution, ILO

Conventions continue to be developed today on a tripartite basis, with employers' representatives and unions, as well as governments, being entitled to vote on the provisions of all ILO Conventions.

Because of the global nature of maritime employment, ILO immediately established separate machinery for developing labour standards applicable to shipping. Following the first Special ILO Maritime Conference in 1920, ICS (then ISF) had the role of co-ordinating national shipowner representatives at ILO meetings, with ICS's opposite number at the ILO still being the ITF, as it was 100 years ago.



*ILO Maritime Labour Conference
in session 2006*

In 1920, the ILO also established the Joint Maritime Commission (JMC). Uniquely within the ILO, the JMC remains bipartite, only comprising representatives of shipowners and seafarers. As well as deciding the agenda for ILO maritime meetings, the JMC is still responsible for updating the ILO Minimum Wage for seafarers, which was first established in 1958, and is something still unique to international shipping.

Relations with ITF

For much of its existence, outside of the institutional format of the ILO, ISF provided a counterweight to the ITF's 'Flag of Convenience' campaign (launched in 1948) and the efforts of ITF's national dock worker union affiliates, using the threat of industrial action, to boycott work on ships whose operators refused to accept the unilateral imposition of ITF crew contracts. However, the ability of stevedore unions to boycott ships was reduced considerably from the 1980s onwards due to changes in employment legislation under most national jurisdictions which increasingly prohibited secondary industrial action.

Relations between ICS and ITF greatly improved following the adoption of the ILO Maritime Labour Convention in 2006, and the establishment of the International Bargaining Forum (IBF) which conducts international collective bargaining negotiations.



*First ILO Maritime Conference Plenary
Session Genoa 1920*

1921



2021

The IBF was established by ITF and the International Maritime Employers' Council (IMEC) in 2003 when the secretariat of IMEC was provided by ISF. Today IMEC is completely independent to ICS but continues to be an ICS Associate Member.

ICS now enjoys an excellent relationship with its social partner, ITF, as shown by their joint co-operation to address the crew change crisis throughout the COVID-19 pandemic and their important work on ensuring a 'just transition' for the maritime workforce as the shipping industry seeks to decarbonise.

ICS's most significant recent achievements, following its merger with the ISF Secretariat, were its contribution to the major revision of the IMO STCW Convention governing seafarers' training standards in the early 1990s, and the negotiation of the ILO Maritime Labour Convention (MLC) in 2006.

First conducted in 1990, another important service established by ICS (with BIMCO) is the comprehensive five-yearly reports on the global supply and demand for seafarers, the most recent being issued in 2021. The latest version of the *ISF Watchkeeper* seafarers' workhour record software, first launched in 1998, is now used by almost 10,000 ships worldwide.



Cover of ICS Annual Review 2020 issued in the middle of the COVID pandemic.

1921



2021

Memories from the ICS archives



*Sir Colin Goad,
Photo Credit: IMO Historical Photo Collection on Flickr*

**Sir Colin Goad, IMO Secretary General (1968 – 1973)
ICS Vice Chairman (1982–1984)**

Writing in 1996

My acquaintance with the shipping industry spanned nearly 50 years. Those were the days. When the now legendary Andersons of P&O (Colin and Donald) came to the British Ministry of War Transport, they were shown the red carpet not the red light! I must have known many of the ICS luminaries in 1957 to 1960 when we were all preparing for the International Conference on the Safety of Life at Sea, but it was after 1963, when I joined IMO (then IMCO) as Deputy Secretary General, that I got to know the unforgettable Bill Graham, Chris Horrocks' predecessor.

The growth and achievement of ICS owe a deal to both, and so when, in 1974, I retired from being Secretary General of IMO and the Liberian Shipowners' Council asked me a little later to represent them in ICS, I was among friends. I well recall my first attendance at a committee under the chairmanship of the redoubtable George King of BP. You got a chance to speak once but not twice.

50 years on, if I were asked to give in short compass an overall impression of ICS, I would respond with two words:



International Chamber of Shipping

quiet efficiency – such as marked the work on the explosions on the *Berge Istra* and *Berge Vange*, the continuing work on tanker safety in ISGOTT, the objective examination of the results of double hulls and the lobbying, not always alas successful, on Capitol Hill. ICS does a lot with little noise. Many (I was one) deplored the so numerous bodies, international and otherwise, which treat of shipping problems; But in the alphabet soup, as it has been called, ICS is a sizeable chunk of meat. Much of its success must be attributed to its Chairman, of whom I served five: Dennis Martin-Jenkins, Harry Beazley, Roy Inverforth, Adrian Swire and Brian Shaw.

Looking back without looking forward makes to reading what of the future tasks of ICS? I remember a lecturer at Cambridge saying that the importance of the mediaeval priest was that he kept the parish full. The importance of ICS is that likewise it stands ready to serve the whole industry being uniquely constituted as the international representative body of free enterprise shipowners. If I may venture a personal and politically incorrect view, I would assert that one of the main tasks of ICS must be an effort to moderate the complexity and volume of control and regulation now being brought to bear on the shipping industry, often by instant experts. Regulation upon regulation, law upon law, inspection upon inspection.

In the long run we shall have no casualties and no spills, but as Keynes remarked, in the long run we shall all be dead. I may claim I think to have done my little bit forward to what IMO Secretary General, CP Srivastava, called 'Safe Clean Seas', but I do sometimes wonder about the end of the road.



*Sir Adrian Swire
Photo Credit: Financial Times Obituary*

Sir Adrian Swire, ICS Chairman 1982–1987)

Writing in 1996

I had the privilege of being Chairman of ICS from 1982 – 1987, years which were extraordinarily difficult for the shipping industry. Indeed I had almost forgotten just how bad they were until I re-read my Chairman's reports: 'a depression deeper, longer-lasting and with more far-reaching consequences for the structure of international merchant shipping than anything modern history can relate'; 'unremitting financial pressures, and constant news of shipping companies in trouble'; 'a picture of unrelieved gloom' – and so on. It is an indication of how shell shocked we all were during these years that, in 1985, I stated that it was a source of 'satisfaction; that tonnage in lay-up had now reduced down to 62 million dwt'.

Against this backdrop, my constant message internally was that ICS had to quantify and demonstrate in hard cash terms the benefit to the worldwide ship owning community of its efforts on their behalf, in for example, checking the wilder excesses (and ensuing costs) of international bureaucracy and in helping minimise



the various worldwide imposts levied on the shipping industry. I was in fact myself increasingly and genuinely impressed by the cost-effectiveness of ICS, with its excellent secretariat under Chris Horrocks and with its relatively small budget. This made argument from the Chair that much more credible (I hope!) when faced by impassioned pleas from every member shipowners' association that its own budget was being ruthlessly cut and ICS likewise must reduce expenditure. But ICS provided then, and it still does, remarkably good value for money.

A recurrent concern during my period of office was the remorseless onslaught against unarmed merchant ships in the Gulf as a result of the war between Iran and Iraq. In 1986 alone, there were 54 recorded strikes against ships, and the war by then had been going on for seven years. We did what we could to urge the UN Security Council to bring pressure to bear and, as Chairman of ICS, I paid an official visit to the Secretary General of the United Nation. The UN were, however, relatively powerless, and the attacks against unarmed vessels, mainly tankers, continued until the war ended. It was an outrage.



*Sir Brian Shaw
Photo Credit: The Sunday Times Obituary*

Sir Brian Shaw, ICS Chairman (1987-1992)

Writing in 1990

It is impossible to look back upon the past twelve months without a sense of wonder. The western world might have been impressed by several years of steady change wrought by President Gorbachev in the Soviet Union, despite regional and economic difficulties, but few of us were prepared for the dramas which unfolded so rapidly in Eastern Europe during the latter part of 1989. Each morning, or so it seemed, the news brought some further development – Poland, East Germany, Hungary, Czechoslovakia, Bulgaria, Romania - to change the face of Europe.

The impact of these upheavals has yet to be clearly felt within the international shipping industry. No doubt there will be improved trading opportunities; no doubt we shall become accustomed to offers of qualified Polish, East German and Russian crews on the international market; but for the present it is familiar issues like the lack of Soviet demand for grain which dominate industry thinking about Eastern Europe.



In the meantime, shipping has prospered in most sectors this year, buoyed up by a generally encouraging world economy and increased demand for shipping services. Rates are still not good enough to sustain a general programme of new building, and every prudent operator is rightly preaching caution against speculative ordering. But revenues are at least high enough to make shipping once again an interesting business to be in, rather than simply an object of macabre fascination.

With improved earnings come increased responsibilities. Not only has the industry changed over the years, but in a period of what seemed like terminal decline it also became rather run down. It now has to prove itself again. The public perception is of an industry that cuts corners, and that perception will not quickly change. Shipping has a better overall safety record than the media suggest, but it is tragic incidents like the *Scandinavian Star* disaster which leave their image rather than the thousands of uneventful voyages. It requires a sustained effort by all shipping companies to sharpen their management control, to satisfy themselves on a continuing basis that their ships are operated safely and efficiently, and to plan for the next generation of seafarers. In many countries the years of attrition have made seafaring a career with unrewarding prospects. That attitude has to be revered if the personnel are to be found to take the industry into the 21st century.



Mr Juan H. Kelly CBE, ICS Chairman (1992-1998)

Writing in 1998

After six years as Chairman of ICS, I shall be standing down at the 1998 Annual General Meeting. So it is perhaps natural both to look back over my period in office and to look ahead to where the shipping industry may be heading.

I recall that I took over the Chair at a time of a little local disturbance, the ICS Secretariat, as tenants of the UK Chamber of Shipping, having been bombed out of its offices two weeks earlier by the IRA. But for the world at large, 1992 was also disrupted by the global recession, high levels of unemployment throughout the world and starvation in Africa and elsewhere. As the servant of world trade, shipping was likewise depressed, notable in the tanker trades, where rates hit a four-year low.

Since that time the industry has continued to have its economic ups and downs, with long periods of over-tonnaging followed by the inevitable rationalisation and the creation of global alliances. Today we are faced with a crisis in the Asian economies and the



concern that regional problems will become worldwide. Once again shipping is affected. Tanker operators, after a period of welcome buoyancy, are again viewing the future with disquiet, while the dry bulk sector, already passing through a difficult period, cannot be at all sanguine about the immediate future. Operationally, I have no doubt that the industry's performance has improved over the past six years. There is a new awareness of public and political expectation, and an acceptance of, even an enthusiasm for, the ISM Code and STCW 95, as a means to fewer ship losses and a lower incidence of oil spills.

But major concerns remain. The dramatized loss of the *Titanic* may be breaking all box office records, but it is less than four years since the only too real tragedy of the *Estonia* occurred. Equally worrying, there has been a spate of bulk carrier losses over several years with unacceptable loss of life. Things may have been getting better, but there is still some way to go. In particular, there is one specific problem to which governments, the shipping industry and indeed the whole maritime community have so far failed to find a solution – the need to eradicate the sub-standard ships.

I realise that experience sometimes painfully reminds us that such objectives are more easily stated than achieved. But the undoubtedly progress made so far should encourage our entire industry to apply itself more forcefully than ever before to implementing those measures which can ensure that shipping not only prospers, but improves its safety and environmental performance. Moreover, we must do it together.



Mr Rolf Westfal-Larsen, ICS Chairman (1998–2006)

Writing in 2002

Shipping is the servant of world trade, and the general slowdown in the world economy over the past year has brought about another period of depressed shipping markets to which the industry is so notably prone. Deliveries of newbuilding orders in a more favourable financial environment have done nothing to improve the situation in the short term.

However, it will not be the economy but the dreadful events of 11 September which will forever be engraved on public memory as the image of the year 2001. After a decade during which the world as a whole has enjoyed relative peace and prosperity, it now has to confront the insidious threat of terrorism, an enemy that can suddenly show its hand almost anywhere and at any time.

As a result, maritime security has been one of the dominant issues of past months. The aviation industry may have been the initial focus of attention after the attacks, but shipping, as a major component in the international transport chain, has also



inevitably been subject to demands for more rigorous security procedures. Ships are not weapons of destruction, and seafarers are certainly not terrorists, but ships could be targeted or used by people of evil intent, and in a more security-conscious world the industry must expect to comply with some additional obligations and inconveniences.

There is of course a balance to be drawn between enhanced security and the maintenance of trade, and one can note with satisfaction that IMO took such early action to address the security issue, thus allowing the United States to bring its proposals for discussion in an international forum. The industry has therefore had the opportunity to encourage practical measures and to stress the need for effective shore-based initiatives to complement any new regulations adopted for ships.

The desirability of striving for a global approach has been paramount in the security debate, and many of the operational issues under discussions today likewise illustrate why international agreement is so important to the shipping industry. The high sulphur content of ships' bunker fuel supplies is an embarrassment for shipowners, who require improved fuel quality around the world to avoid emitting atmospheric pollutants. While the impact of such practices may be largely local, the problems are common to the shipping industry whatever it trades, and the importance of addressing them internationally through IMO cannot be overstated when ships are trading from continent to continent to an often unpredictable schedule.



Mr Sypros M Polemis, ICS Chairman (2006-2012)

Writing in 2009

The world has become a very different place over the past few years - the unprecedented good times enjoyed by shipowners unfortunately have come to a sudden end. Most shipping companies had anticipated that such fantastic markets could not go on for ever, and most have hopefully prepared accordingly. But I think few in the industry honestly expected that the downturn might inflict itself quite so rapidly.

As the servant of world trade, the international shipping industry must therefore brace itself for an extremely rough ride. As I write, the world's leaders have recently met in London for the G20 Summit, to agree on how they can collectively restore order to the world economy. While there is apparent consensus that nations must avoid protectionism if world trade is to recover, it must be hoped that this is more than just rhetoric.

In spite of these difficult times, though, it remains critical that the industry continues to pursue the highest standards of safety and



environmental protection, as well as ensuring we have properly trained and well-motivated seafarers to man our ships. The safety of the seafarers who serve at sea is always the industry's greatest priority, so the massive increase in pirate attacks, with hundreds of seafarers being kidnapped, has required serious attention. This is not a problem that will go away easily or quickly and that is why governments must continue to provide military protection to ships in the Gulf of Aden and other danger areas for the foreseeable future.

Notwithstanding the economic downturn and concerning maritime security trends, governments are publicly committed to delivering a new regime to reduce CO₂ emissions and limit the effects of climate change. A major priority of ICS in 2009 is to help IMO develop a package of substantial proposals on how CO₂ emissions from ships might be regulated internationally, which can be presented to the next major United Nations Conference on Climate Change, in Copenhagen in December 2009. Notwithstanding the wide range of views among shipping companies about preferred solutions, if the industry is to have an influence on the final outcome it will need to present a united position. Together with our member national shipowners' associations, we are therefore working hard to ensure that we are able to comment authoritatively on any of the possible options that are pursued.



Mr Masamichi Morooka (Chairman, ICS 2012 – 2016)

Writing in 2016

When I was first elected, little did I think that most sectors of the industry would still be waiting in vain for a sustained economic recovery. Nor did I expect that the price of oil would fall by around 70%, or that ships would be involved in the rescue of tens of thousands of migrants seeking to escape crisis in the Middle East and Africa. But there are two continuing trends in 2016 which have not surprised me.

The first is that preparing for compliance with new environmental regulations still presents a major challenge. In particular, the industry must be ready to address the economic impact of the low sulphur fuel cap (expected to apply globally from 2020). There are also the many uncertainties associated with the implementation of the IMO Ballast Water Convention, which may well enter into force during 2017. The second is that the authority of IMO continues to be challenged by unilateral rules, principally those emanating from the European Union and the United States. This is making the maintenance of an effective global



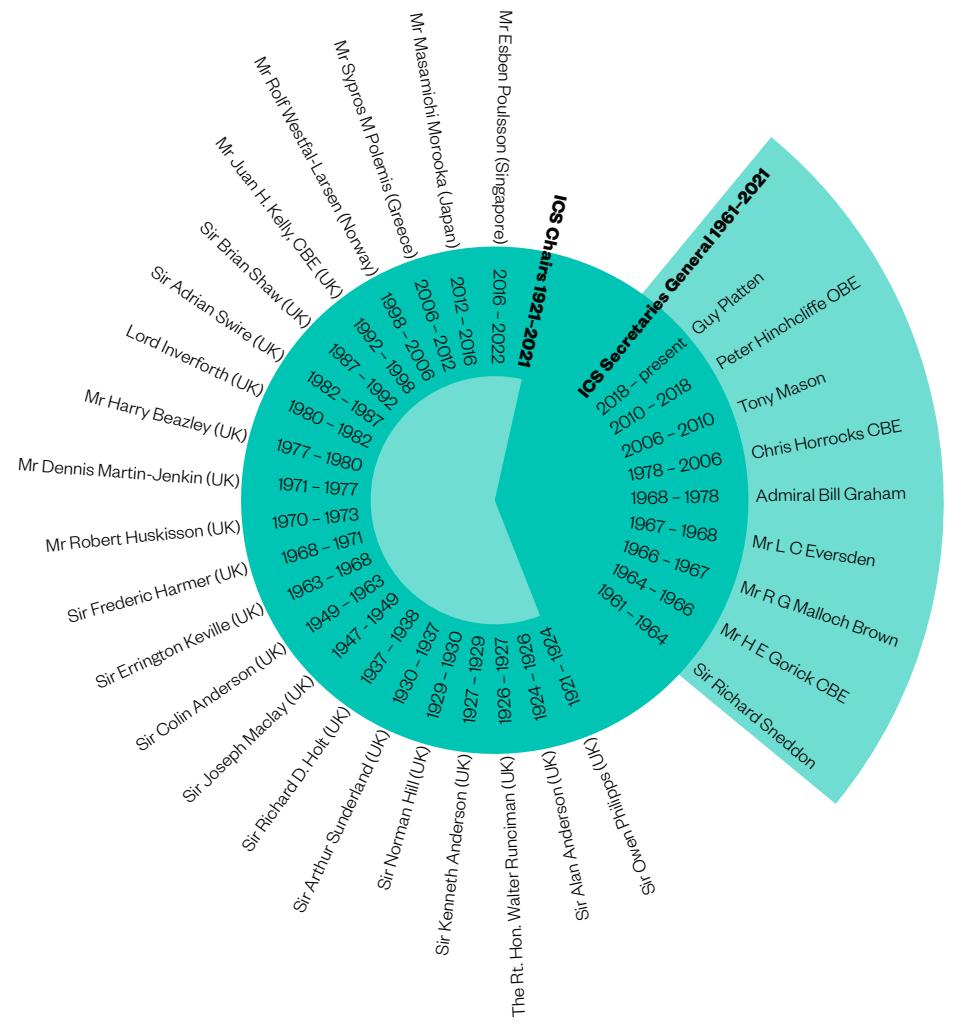
regulatory framework increasingly complicated. The IMO global regime cannot and must not be taken for granted.

I am pleased that in December 2015, ICS played a part in the United Nations Climate Conference in Paris, and is now taking an active role to consider the shipping industry's next steps to help further reduce the sector's CO₂ emissions. Now that IMO has finalised the details of its CO₂ data collection system, I am hopeful that IMO Member States (which are the same nations that were represented in Paris) will be able to make further progress.

My last few months in office have coincided with the appointment of the new IMO Secretary-General, Mr Kitack Lim. I am especially pleased that he appears to be sympathetic to ICS's goal of helping IMO Member States to deliver even better regulation, which will take more account of shipping's economic sustainability as well as continuous improvement of its environmental performance. It is therefore very fitting that the IMO theme for 2016 is 'Shipping: indispensable to the world'.

It has been a pleasure to serve as Chairman of ICS, as well as a great responsibility. I have much enjoyed the discussions amongst the ICS member associations as they have sought to find solutions that are in the interest of the industry as whole.

Developing unified positions that are acceptable to the wider industry, as well as the ambitions of governments, is not always easy, particularly when so many ship operators face such truly challenging markets. A commitment to co-operation and common sense is a hallmark of the discussions within ICS, and something which never ceases to impress.



Full Members

AUSTRALIA Maritime Industry Australia Limited
 BAHAMAS Bahamas Shipowners' Association
 BELGIUM Royal Belgian Shipowners' Association
 CANADA Canadian Chamber of Marine Commerce
 CYPRUS Cyprus Shipping Chamber
 DENMARK Danish Shipping
 FAROE ISLANDS Shipowners of the Faroe Islands
 FINLAND Finnish Shipowners' Association
 FRANCE French Shipowners' Association
 GERMANY German Shipowners' Association
 GREECE Union of Greek Shipowners
 HONG KONG, CHINA Hong Kong Shipowners Association
 IRELAND Irish Chamber of Shipping
 ITALY Italian Shipowners' Association
 JAPAN Japanese Shipowners' Association
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 KUWAIT Kuwait Oil Tanker Co.
 LIBERIA Liberian Shipowners' Council

**ICS Member Associations 2022****Associate Members**

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Regional Partners

Minutes of the first ICS meeting

Report of the International Shipping Conference held at
Hotel Victoria, Northumberland Avenue, London, 23rd – 25th
November 1921 [Extract]

Sir Owen Philipps, G.C.MG., MP, President

FIRST DAY – Wednesday 23rd November

OPENING OF THE CONFERENCE

The delegates were received by the President Sir Owen Philipps, G.C.M.G., MP., in the ante-room adjoining the Conference Hall.

OPENING SPEECH BY THE PRESIDENT.

WELCOME TO FOREIGN DELEGATES.

ADOPTION OF THE PROGRAMME.

THE CHAIRMAN: Gentlemen, as President of the Chamber of Shipping of the United Kingdom, it gives be very great pleasure to welcome you gentlemen, who represent the shipowners of some fourteen maritime countries of the world, to this International Shipping Conference.

Many of you have come thousands of miles in order to take part in this Conference, and it is particularly gratifying to see so many distinguished shipowners and representatives of shipowners here today in response to the invitation of the Chamber of Shipping.

This is the first Conference of its kind that has ever been held. The proposal that a Conference should be held did not emanate from British shipowners, but when the first suggestion was made we found ourselves too fully occupied to take any practical steps in the matter, apart from the fact that a Conference could not have been arranged which would have been completely representative of the shipowners of the world. Fortunately, the difficulties in the way of holding a Conference have now been surmounted, and we have with us today fourteen of the maritime countries of the world. A conference such as this has become inevitable.

In recent years, and more especially during the last few years, as a result of the war, there has been a growing tendency towards co-operative organisation, not only nationally but internationally. It is evident in the actual conduct of shipping business, as well as in other great industries which have the world as their sphere of activity, whilst the growth and strength of the organisation of labour, both national and international, has been particularly noticeable. Nations, like



individuals, have shown a greater tendency to co-operate to mutual advantage.

Prior to the war, the maritime countries of the world prepared the draught maritime convention of 1914, commonly known as the convention of London, some of the provisions of which will occupy, perhaps, the most important part of our programme. We have seen the League of Nations established with the International Labour Office as one of its branches. And, at the present day, there is sitting at Washington what may prove to be an epoch making conference of nations. Hardly any international conference, whether of nations, commercial men or representatives of labour, is ever held which does not, either directly or indirectly, deal with questions in which we are all interested – shipping. The shipping industry has hitherto been in the forefront in organising, and we shipowners cannot lag behind.

For dealing with labour questions, an international organisation of shipowners is already in existence in the International Shipping Federation, but apart from this there has hitherto been no attempt to organise an international body of shipowners, except in regard to particular trades - I refer particularly to the great liner conferences and the Baltic and White Sea conference. As an industry our great protection indemnity and defence clubs, local shipowners' associations and national and special associations of shipowners give us an advantage possessed by no other section of the commercial community and render international organisation a comparatively simple matter.

In a body such as the international Chamber of Commerce there is no very direct link between the representatives who attend international conferences and the individual merchants and manufacturers. With the delegates to this conference today there is a connexion with almost every individual shipowner throughout the whole world. In the absence of any such international organisation we have been – and I hope will still be – indebted especially to two bodies, namely, the International Law Association and the Committee Maritime International, for providing the means of discussion whereby many maritime questions have in fact been settled internationally. Thus, the International Law Association arranged and propounded the famous York Antwerp rules now in general adoption, and has recently framed The Hague rules of 1921, and produced a report on deck cargo's, both of which subjects are included in our agenda.

The Committee Maritime International has been responsible for framing several valuable draught maritime conventions. The draught convention on salvage and collisions which they evolved has already received international assent, whilst their conventions on limitation of liability and mortgages and lien (which are also on the agenda of this conference) have already received consideration at the hands of one diplomatic conference, and there is every reason to hope they will be accorded international sanction if we do our part in pressing our respective governments to give them early consideration.

These two distinguished international bodies consist primarily of eminent lawyers to whose voluntary labours we are deeply indebted. They are also composed of representatives

of under writers, merchants and others, and are quite independent of any particular trade interest. They can, therefore, perform a function which no purely trade organisations such as this conference can perform. But, nevertheless, these two bodies, good as they are, cannot take the place of an international conference like this. There are many subjects which, as practical shipowners, we must consider for ourselves among ourselves.

We must always be ready to consider among ourselves propositions emanating from such bodies as these and from merchant organisations affecting the conduct of our business, and we will always, I hope, be prepared to consider proposals and suggestions advanced by other bodies – especially government – which would prescribe or seek to have prescribed the manner in which we should build, equip, manage and run our ships, or would impose other conditions gravely affecting the conduct of our great industry.

At no time in the history of the world trade has it been more important to observe that, in providing the sea carrying services of the world, we should be guided not only by considerations of safety and efficiency, but also by considerations of economy which appeal to us at the present time.

Each consideration is fundamental, and if we lose sight of any one of these objects we shall fail to achieve the others. With regards to the programme before you, I will not, at this stage, attempt anything but a brief review of the various matters which we will have to deal in the course of this three day conference. From their very nature, these matters

are very complex and technical, but nonetheless of great importance to everyone connected with the great industry of shipping. In 1914 the Convention of London, which dealt with a great variety of subjects, was hurriedly prepared and made as a result of the terrible shock which the whole world sustained from the Titanic disaster. The Convention has not been ratified, and its provisions demand reconsideration in the light of seven years reflection and experience, and no less with regard to the changed economic conditions of the world.

We have, therefore, felt that it was incumbent upon us, in calling this conference, to include in the agenda some of the most important provisions of that Convention, namely, the subdivision of passenger vessels, lifesaving appliances and wireless. I have already referred to matters emanating from the International Law Association and the Committee Maritime International, namely, the limitation of shipowners liability and maritime liens, The Hague rules and deck cargoes. These subjects have been placed upon the agenda as well as two others, namely, documentary agreements and load lines. These, I think you will agree, are very important and pressing matters, calling for international consideration by shipowners. If we are to make progress, it will be necessary to deal with each subject as broadly and as briefly as possible, having regards to the time at our disposal.

The position of the shipping trade presents very interesting problems as to the remedies applicable in practice to the existing unsatisfactory state of affairs in the industry. What, for instance, should be done with the present super abundance of vessels, whose number far exceeds anything that is likely

to be required by the world within the next few years. This is a matter of more than local interest. A very large number of the older vessels afloat, as well as some of the inferior new ones built more or less for emergency purposes during the war, or, in my opinion, to be broken up. The serviceable material of which they are composed should be made use for other purposes. The principal difficulty that stands in the way of this being carried out, in many cases, is the fact that the cost of labour for breaking up a vessel often nearly equals the value of the material; But this is a matter which I hope will right itself in the not distant future.

If the governments and peoples of the great countries represented at this conference today resolved to do away with even half of the present artificial restrictions on trade and commerce, there is no doubt there would be an employment for a greater number of steamers than there is at present and this would at once result in employment being given to an enormous number of men who are at present waiting for work. Unfortunately, one of the aftermaths of the Great War is that a very large number of people in all countries appear to think there is no necessity to work anything like so hard as they did in days gone by, and this is one of the after war myths that must be cleared away before general prosperity and good times can return.

In conclusion on behalf of the Chamber of Shipping of the United Kingdom and of all British shipowners I give you the warmest welcome to this great city , which, if not the greatest, is certainly one of the largest and most important ports in the world, besides being the capital of the British Empire.

Members associations attending 1921 meeting

AMERICA

*American Steamship
Owners' Association*

FRANCE

*Comité Central des
Armateurs de France*

NORWAY

Norges Reder forbund

AUSTRALIA

*Australian Steamship
Owners' Federation*

GERMANY

*Zentralverein Deutscher
Rheder*

SPAIN

*Asociación de Navieros
de Bilbao*

BELGIUM

*Union des Armateurs
Belges*

HOLLAND

*Nederlandsche
Reedersvereeniging*

GREAT BRITAIN

Chamber of Shipping

CANADA

*Shipping Federation of
Canada*

ITALY

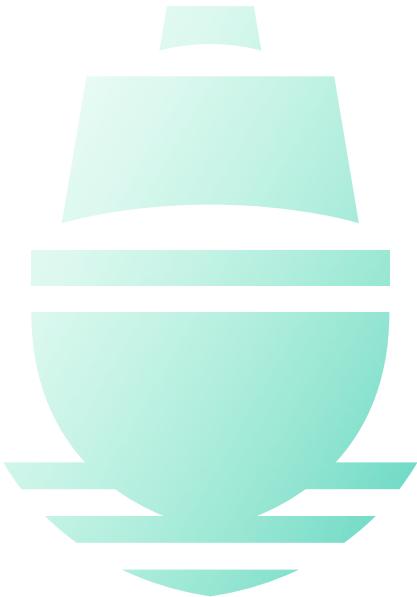
*Federazione Armatori
Italiani*

DENMARK

*Baltic & White Sea
Conference*

JAPAN

*Shipowners' Association
of Japan*



International Chamber of Shipping

7th Floor, Walsingham House
35 Seething Lane
London EC3N 4AH

Telephone + 44 20 7090 1460
info@ics-shipping.org
www.ics-shipping.org



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