

**UNITED NATIONS ECONOMIC AND SOCIAL COMMISSION FOR ASIA
AND THE PACIFIC**

**REPORT OF THE UNESCAP REGIONAL CONFERENCE/FORUM OF
FREIGHT FORWARDERS, MULTIMODAL TRANSPORT OPERATORS
AND LOGISTICS SERVICE PROVIDERS**

and

**THE UNESCAP MEETING OF CHIEF EXECUTIVES OF NATIONAL
ASSOCIATIONS OF FREIGHT FORWARDERS, MULTIMODAL
TRANSPORT OPERATORS AD LOGISTICS SERVICE PROVIDERS**

Beijing, China, 20 June 2014

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I. MAIN CONCLUSIONS AND RECOMMENDATIONS OF THE CONFERENCE/FORUM

1. The Conference/Forum was briefed on the work carried out by UNESCAP in the field of infrastructure, facilitation and logistics, in particular relating to the Intergovernmental Agreement on Dry Ports, comprehensive policy frameworks for logistics, the development of logistics information sharing standards, facilitation of rail transport in the region and the Regional Network of Legal and Technical Experts on Transport Facilitation.
2. The Conference/Forum reviewed the progress and challenges of the implementation of regional commitments under the framework of the Association of Southeast Asian Nations (ASEAN), and the possible impacts of the introduction of the ASEAN Economic Community (AEC) in 2015. The Conference/Forum recognized the importance of full implementation of the Master Plan on ASEAN Connectivity for the realization of potential benefits, and invited UNESCAP to support the efforts for ASEAN integration.
3. The Conference/Forum discussed the key features of cloud technologies, and the benefits and challenges of their implementation in the freight forwarding industry. The Conference/Forum noted the persistent data security and privacy concerns which hindered the adoption of cloud technologies in the industry, and discussed ways in which these concerns could be addressed.
4. The Conference/Forum noted the training framework developed by China International Freight Forwarders Association (CIFA) as a joint venture between the private sector and educational institutions. The Conference/Forum recognized the importance of private sector involvement in the development of training programmes for enhanced benefit in terms of professional standards and student employment prospects.
5. The Conference/Forum also noted the initiatives by other national associations to enhance professional standards in the industry, including the development of national competence standards, cooperation with universities for the development of a FIATA Diploma programmes, and cooperation with ministries and other public sector agencies for the raising of awareness of issues affecting the logistics sector.
6. The Conference/Forum discussed a range of common operational issues in the region contributing to high logistics cost and loss of competitiveness. It was recognized that the government could contribute to the solving of operational issues through effective regulation in the cases when the operational environment allows for unfair practices.

7. The Conference/Forum agreed on actions to be taken by UNESCAP to raise awareness on operational issues discussed and the possible solutions. In particular, the Conference/Forum requested UNESCAP to carry out a brief survey among freight forwarders in the region regarding the practice of container deposits, to prepare a policy brief on block exemption orders in shipping, and to support sub-regional integration within the framework of ASEAN. Additionally, the Conference/Forum requested UNESCAP through its document for the inter-governmental Committee on Transport to draw attention of policy makers to the high logistics costs in the region, factors contributing to it and the role of logistics policy in overcoming challenges in the operational environment.
8. The Conference/Forum suggested that the agenda in 2015 could include a session by the ASEAN Secretariat on the evaluation of the AEC. The Conference/Forum also suggested that a session is organized on regional connectivity, and the inclusion of new technologies in the agenda. The Conference/Forum agreed that the dialogue on operational issues was a useful channel for discussing common challenges and agree on ways forward.

II. SUMMARY OF THE PROCEEDINGS

9. The Conference/Forum comprised the following substantive topics.
 - A. **Update on the latest work by UNESCAP with relevance to freight forwarders, multimodal transport operators and logistics service providers**
10. Ms. Heini Suominen, Associate Economic Affairs Officer, Transport Facilitation and Logistics Section, Transport Division, UNESCAP, briefed the participants on the major initiatives by the secretariat since the Regional Forum of 2013. She provided an update on the progress on the Intergovernmental Agreement on Dry Ports since it opened to signing in November 2013, including the current status of signatories and activities planned by UNESCAP to support the implementation of the Agreement in the region. She also highlighted the changing role of logistics service providers and the emerging challenges in the development of logistics policy, and introduced the UNESCAP publication Guide to Key Issues in Development of Logistics Policy, which offered recommendations on the establishment of an integrated policy framework for the industry. She also provided the participants an update on the work that was being carried out by UNESCAP on the establishment of regional logistics information standards and recommendations on national logistics information service systems. The participants were also introduced to the key findings of the Monograph Series on Transport Facilitation of International Railway Transport in Asia and the Pacific, and the recently established Regional Network of Legal and Technical Experts on Transport Facilitation.

B. The impact of logistics infrastructure and facilitation on the ASEAN Economic Community development

11. Mr. Ruth Banomyong, Associate Professor and Head of Department of International Business, Logistics and Transport, Thammasat Business School, Thammasat University, Thailand, discussed the AEC, the Master Plan on ASEAN Connectivity and the expected impact on ASEAN. He emphasized the key role of logistics as a priority industry, and discussed the challenges of inadequate implementation of the various ASEAN initiatives relevant to transport and logistics. He outlined the results from the geographical simulation model analysis on the impact of fully implemented AEC on ASEAN member states, indicating overall positive impact with regional variation due to changes in the supply chain of various industries.
12. The Conference/Forum expressed interest in the academic work on the expected impacts of the AEC on member states and noted that in many countries the benefits of AEC could be overshadowed by concerns on possible negative impacts. It was recognized that organizations such as UNESCAP and the International Federation of Freight Forwarders Associations (FIATA) had a role in raising awareness of the advantages of regional integration in member states to encourage alignment of national policy with regional priorities and commitments.

C. Enhancing operational capacities and capabilities through cloud technologies

13. Mr. Desmond Tay, Managing Director, vCargo Cloud, Singapore, introduced the participants the concept of cloud technologies. He described the evolution of cloud computing to its current form and outlined the essential characteristics of cloud technology. He described the various service and business models offered and the different deployment methods with their respective benefits and challenges. He also discussed the application of cloud technologies in the logistics industry with a case study on the e-Freight initiative in Singapore. He highlighted the main challenges and concerns over the adoption of cloud technologies for users and offered suggestions on different approaches to overcoming obstacles to adoption. He also reflected on the lessons learned for maximization of benefit and on possible future developments for cloud technology.
14. The Conference/Forum noted that while cloud technologies had been introduced for logistics in some countries in the region, there was still considerable resistance to its adoption due to concerns over data security and privacy. It was suggested that these issues were not restricted to cloud technologies and applied to traditional IT systems as well. Additionally, while it was not possible to completely remove the risk associated with data security, the providers of cloud technology were often subject to more scrutiny in terms of privacy and security and might therefore in some cases be able to provide higher levels of data protection than IT systems internal to the company.

D. Introduction to the Professional Education and Development Group of International Freight Forwarding, China

15. Mr. Fang Jian, Training Director, CIFA, introduced the program of International Freight Forwarding Vocational Education and Occupation Development Group. He described the group's role in ensuring the training was both appropriate for industry needs and promoted employment for students at all levels of education, and highlighted the cooperation between schools and enterprises in the implementation of the programme. He also outlined the approach for the development of professional teaching and curriculum standards and the plans for a diverse range of options for course delivery, such as distance learning. The Vocational Education and Occupation Development Group planned also to promote continuous development of the vocational programmes through measures such as a talent resource database.
16. The Conference/Forum recognized the importance of the involvement of private companies in the development of vocational training programmes to ensure a consistent quality and professional standards. The participants noted the training programme introduced by CIFA as regional good practice and as a useful example for those associations looking to further develop their training programmes. The Conference/Forum also noted the on-going consultation of FIATA on the demand for the introduction of refresher training courses and the revision of the FIATA Diploma curriculum.
17. The representative of Indonesia also informed the Conference/Forum that discussions were on-going on the establishment of community colleges for logistics in Indonesia, targeting school leavers. Certificates of competence were also being developed for the industry.

E. Dialogue on resolving operational challenges

18. Mr. Yuwei Li, Chief, Transport Facilitation and Logistics Section, Transport Division, UNESCAP, introduced the participants to the role of UNESCAP as a regional intergovernmental body and invited the participants to share their views on a range of operational issues, highlighting the need to identify common challenges for the industry in the region and concrete actions UNESCAP can take to facilitate the finding of solutions.
19. The Conference/Forum agreed that the requirement of container deposits was a common challenge in countries in the region and posed considerable pressure on cash flows of logistics service providers. Additionally it was reported that the recovery of deposits could be a long process and that the deposits were often subject to deductions by shipping lines. The Conference/Forum expressed concerns that the continuing use of such additional payments promoted an operational environment characterized by lack of transparency and opened the

- commercial relationships to abuse. Participants described initiatives introduced by national associations to overcome the issue, such as guarantee schemes and container insurance schemes. The Conference/Forum requested UNESCAP to carry out a brief survey among freight forwarders in the region to identify the extent of the problem and to bring the matter to the attention of member states. The Conference/Forum also noted the channels for influence provided by FIATA, such as the FIATA Working Group Sea Transport.
20. The Conference/Forum noted that the shipping lines were in some countries subject to block exemption orders which allowed them to cooperate in ways not consistent with the anti-trust laws. It was recognized that there were limited studies on the impact of block exemption orders or the impact on the industry of their abolition. However, it was highlighted that in many cases the freight forwarding associations opposed to the introduction of such exemptions, particularly in the case of Voluntary Discussion Agreements (VDA), on the basis that they encouraged price fixing, price increases and capacity restrictions. The Conference/Forum suggested that the removal of competitive pressures could also contribute to an increased prevalence of dubious charges and unfair business practices. The Conference/Forum requested UNESCAP to prepare a policy brief on block exemption orders in shipping to raise awareness of the issue and practices in the region, and to offer suggestions for policy makers on possible solutions.
 21. The Conference/Forum recognized that dubious charges by carriers and non-vessel operating common carriers contributed to the high logistics cost in many countries in the region. It was noted that in some countries government regulation had been introduced to address the issue. While it was emphasized that in principle additional regulation was normally considered unnecessary by the industry, the Conference/Forum suggested that the government could significantly contribute to the overcoming of the issue of non-transparent charging through legislative action. The need for comprehensive consultation on the development of regulation was highlighted. The Conference/Forum requested UNESCAP through its document for the inter-governmental Committee on Transport to draw attention of policy makers to the high logistics costs in the region, particularly in landlocked countries, the role of dubious charges in logistics cost, and the role of logistics policy in enforcing transparency in the operational environment.
 22. The Conference/Forum noted the lack of coordination in the processes and requirements of other government agencies in the region. The Conference/Forum encouraged UNESCAP to support ASEAN initiatives for greater harmonization of the work of other government agencies, and welcomed increased engagement of FIATA with the work of UNCEFACT regarding this matter.

F. Good practices by national associations

23. The participants from the following association made statements.

24. **Cambodia:** The participants from Cambodia informed the participants that Cambodia Freight Forwarders Association (CAMFFA) was currently in discussions regarding the introduction of the FIATA Diploma programme as a joint initiative by the association and Cambodian universities.
25. **Indonesia:** The participants from Indonesia shared with the Conference/Forum participants that Indonesian Logistics and Forwarders Association (ILFA/ALFI) was cooperating with the Ministry of Trade on a series of seminars on logistics in selected provinces to promote the industry to public and private sector. The association was also working with the Ministry of Transport on the development of national standards of competency for logistics. The Conference/Forum was informed that the logistics themes and related key drivers for Indonesia were currently being updated.
26. **Malaysia:** The participants from Malaysia highlighted key initiatives by the association to improve operations and to raise professional standards in the industry. Already 1,102 persons had attended the Foundation Course in Freight Forwarding and Multimodal Transport, which was also incorporated in the industry minimum standards. The Federation of Malaysian Freight Forwarders (FMFF) had also supported the introduction of the FIATA Diploma as a part of Malaysian University of Science and Technology (MUST) Diploma in Logistics. In the first half of 2014, already 103 students had enrolled in the programme. FMFF had also established a liability insurance scheme to improve the insurance rates available to members.
27. **Thailand:** The participants from the Thai International Freight Forwarders Association (TIFFA) informed the Conference/Forum that the Thailand Professional Qualification Institute had invited TIFFA to participate in the development of national competency standards for freight forwarding and logistics. Job descriptions and related competencies were being developed for seven positions in the industry, and in the future there was the possibility the association being involved in the certification of professional qualifications.

G. Other matters

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