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Shaping the Future of Shipping

Shipping Industry Flag State Performance Table

2024/2025



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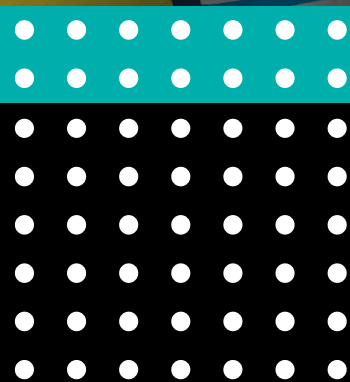


ASA
Asian Shipowners' Association



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Shipping Industry Flag State Performance Table 2024/2025

Published by
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London EC3N 4AH

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The International Chamber of Shipping (ICS) is the global trade association representing national shipowners' associations from Asia, Africa, the Americas and Europe and more than 80% of the world merchant fleet. Established in 1921, ICS is concerned with all aspects of maritime affairs, particularly maritime safety, environmental protection, maritime law and employment affairs. ICS enjoys consultative status with the UN International Maritime Organization (IMO) and International Labour Organization (ILO).

Purpose

Shipping is a global industry, responsible for the safe and efficient transportation of about 90% of global trade.

The world's commercial ships operate in accordance with a comprehensive regulatory framework under the United Nations Convention on the Law of the Sea (UNCLOS) and detailed Conventions – regulating maritime safety, environmental protection and seafarers' training and employment conditions – adopted by the UN International Maritime Organization (IMO) and the International Labour Organization (ILO). Under these global Conventions, it is flag state administrations which have primary responsibility for enforcing implementation and full compliance by ships, that sail under their flag, with IMO and ILO standards and regulatory requirements, augmented by a sophisticated global system of port state control (PSC).

Because shipping is a global industry, most shipping companies with ships in international trades have a choice with respect to the flag state with which they elect to register their ships. However, whilst there may be advantages to selecting a particular flag, it is vitally important that shipping companies have as much information as possible about flag state performance and are actively discouraged from choosing to use flag states that may not fully meet their international obligations.

This is the purpose of the ICS Flag State Performance Table which, for the past 20 years, has been updated annually using objective externally published data.

The Flag State Performance Table seeks to encourage shipowners and operators:

- To examine whether a flag state has sufficient substance before using it.
- To put pressure on their flag administrations to effect any improvements that might be necessary, especially in relation to safety of life at sea, the protection of the marine environment, and the provision of decent working and living conditions for seafarers.


How to use the Table


This Table summarises factual information in the public domain that might be helpful in assessing the performance of flag states. Sources are shown in the footnotes at the end of this report. The Table is not an official assessment of overall compliance, nor a ranking of flag states based on overall compliance.


Positive performance indicators are shown as green squares on the Table.

Like all datasets, the Table needs to be used with care. Where a flag state is missing a single positive indicator, in itself this does not provide a reliable measurement of performance. For example, a flag state might be unable to ratify a Convention due to conflict with domestic law but might nevertheless implement its main requirements. Equally, a flag state may not be listed on PSC 'white list' because it does not make any port calls in that PSC region.

However, if a large number of positive indicators are shown as being absent, this might suggest that performance is unsatisfactory and that shipping companies should ask further questions of the flag state concerned.

 GREEN squares suggest positive performance indicators

 RED squares highlight potentially negative performance (although individual indicators should be considered within the context of the Table as a whole).

 GREY squares suggest neutral indicators, as IMO Member State Audits became mandatory in 2016 and public data on the status of these audits varies and is updated on a live basis. Further detail on the methodology is outlined on page 6.

The Flag State Table and its criteria are **not intended to be used for commercial purposes or assessments of the performance of individual ships that may elect to use a particular flag**. It is only intended to encourage shipowners and operators to maintain an open dialogue with their flag administrations about potential improvements, which may be necessary for enhancement of safety and security of life at sea, protection of the marine environment and provision of decent working conditions for seafarers.

Methodology

The Flag State Performance Table is based on the most up-to-date data available as of January 2025

Port state control

A simple means of assessing the effective enforcement of international rules is to examine the collective PSC record of ships flying a particular flag.

The three principal PSC authorities are the countries of the Paris Memorandum of Understanding (MOU), the Tokyo MOU and the United States Coast Guard (USCG). All three authorities target particular flags on the basis of deficiencies and detentions recorded for ships flying that flag. The Table identifies flag states that feature on the Paris and Tokyo MOUs' white lists and that have fully qualified for the USCG's Qualship 21 program, and those which do not appear on their respective black lists/target lists. Ships whose flag states do not appear on PSC white lists tend to be subject to a greater likelihood of inspections.

The Table now also identifies those flags whose ships suffered no detentions within a particular PSC region over the previous three years, but did not meet the relevant minimum requirement of inspections or arrivals to be included in the MOU white lists/ Qualship 21 program. In order to be identified in this way with respect to the Paris and Tokyo MOU white lists, a flag must have undergone at least one inspection in the previous three years. With respect to the Qualship 21 program, a flag must have made at least three distinct arrivals in each of the previous three years. As regards the USCG Target List, flags which are listed as 'Medium Risk' on the list are identified with a neutral indicator. This is in alignment with the way in which the three PSC authorities present this information.

NB: Flags which do not qualify for Qualship 21 have not been given red squares, as the list of flag states which qualify varies considerably from year to year and non-inclusion is currently not regarded by ICS as an indicator of potentially negative performance.

The full criteria for PSC are explained in the footnotes to the Table.

Ratification of major international maritime treaties

Ratification of international maritime Conventions does not necessarily confirm whether the provisions of these global instruments are being properly enforced. However, a flag State should be able to provide good reason for not having ratified any of the instruments referred to in the Table.

The Table refers to those 'core' Conventions, relevant to flag State responsibilities, which already enjoy widespread ratification and enforcement. The full criteria for the Conventions listed are shown in the footnotes to the Table.

Use of Recognized Organizations in compliance with the IMO RO Code

The IMO Code for Recognized Organizations (RO Code) requires flag states to establish controls over ROs conducting survey work on their behalf, and to determine if these bodies have adequate resources for the tasks assigned. The RO Code also requires flag states to submit data to IMO on the ROs authorised to act on their behalf.

The Annual Reports released by the Paris and Tokyo MOUs on PSC contain 'Performance Lists of Recognized Organizations', which rank each RO into high-, medium-, low- and very low-performing. Using a combined list of high-performing ROs from the Paris and Tokyo MOU lists, the table positively identifies flag states which employ as many or more high-performing ROs, as they do non-high-performing ROs, and which have submitted their RO related data to the IMO in line with the RO Code.

Age of fleet

A high concentration of older tonnage under a particular flag does not necessarily mean that this tonnage is in any way substandard. However, a flag which has a concentration of younger ships may be more likely to attract quality tonnage than a flag state with a high concentration of older vessels.

Calculations of 'Average age' are conducted through the UNCTAD Stat Database, which is publicly available at <https://stats.unctad.org/Maritime>. The average age is determined based on analysis of aggregated data of ships registered under a particular flag state.

As a positive indicator, the Table therefore shows the 90% of flags (among those listed) that have the lowest average fleet age (the bottom 10% of those listed having the highest average age). Nevertheless, it is strongly emphasised by ICS that the age of an individual ship is not an indicator of quality, and that the condition of an individual ship is ultimately determined by how it is maintained.

Reporting requirements

There are various reporting requirements concerning the submission of information by flag states to IMO and ILO. Information covering the extent to which flag States actually comply with these reporting requirements is not always available in the public domain.

However, as an indicator, the Table positively identifies flags that are in compliance with ILO reporting obligations, as well as flags confirmed by IMO to have communicated information demonstrating that full and complete effect is given to the relevant provisions of the STCW Convention (as amended in 2010) and included within the latest STCW white list, as approved by the IMO Maritime Safety Committee.

Attendance at IMO meetings

Although in itself not an indicator of their safety and environmental record, flag states that attend the major IMO meetings (Maritime Safety Committee, Marine Environment Protection Committee and Legal Committee) are thought more likely to be seriously committed to the implementation and enforcement of IMO rules.

Attendance at these meetings is also important to keep abreast of regulatory developments. The Table identifies flag States that have been represented at all meetings of these three major IMO committees, plus the biennial meeting of the IMO Assembly, during the two years previous to 1 January 2024.

IMO Member State Audit

When governments accept to be bound by an IMO Convention, they tacitly agree to incorporate it into their national law, implement it, and enforce its provisions. The IMO Member State Audit Scheme determines how effectively audited states adhere to all applicable mandatory IMO instruments covered by the Scheme. These audits became mandatory in 2016. The public availability of IMO data on the status of scheduled and completed audits varies and is updated on a live basis. As such, all IMO member states are marked in grey colour in the Table, and a negative indicator is only given to those flag states that are not members of IMO and are therefore not subject to these mandatory member state audits. Given the IMO Audit Scheme is now mandatory, the inclusion of this metric in future iterations of the Table will be re-assessed.

Update to member states

This edition of the Flag State Performance Table reflects updates to the roster of assessed countries, ensuring alignment with current maritime trends and priorities. Specifically, three countries – British Virgin Islands, Costa Rica and Uruguay – have been removed due to their relatively small fleet sizes, which no longer meet the criteria for inclusion.

Conversely, four new countries – Cambodia, Eswatini, Gabon and Guinea-Bissau – have been added. These additions reflect a rapid increase in fleet size for these nations, warranting their evaluation within the Table to maintain comprehensive and up-to-date coverage of flag state performance.

Footnotes

Port State Control

Paris MOU Annual Report 2023 (published in 2024); Tokyo MOU Annual Report 2023 (published in 2024); USCG Qualship 21 Qualified Flag Administrations 2023 and USCG List of Targeted Flag Administrations 2023, as recorded in USCG Port State Control Annual Report 2023.

Paris and Tokyo MOU data relate to their 'white lists' and 'black lists' but not their 'grey lists'. Many flag states which are on neither the MOU white list or black list are included in the grey list.

However, flag states whose ships have been inspected less than 30 times in the last three years do not appear in any of the MOU lists. This principle applies in both the Paris MOU and Tokyo MOU regions.

The USCG methodology for evaluating PSC detention ratios (USCG target list and Qualship 21) uses the formula of detentions/distinct vessel arrivals, rather than detentions/inspections as used by the Paris and Tokyo MOUs. In order to be considered for Qualship 21 status, a flag state's ships must have made at least ten distinct arrivals per calendar year for the previous three years.

The Table also identifies those flags whose ships suffered no detentions within a particular PSC region over the previous three years, but did not meet the relevant minimum requirement of inspections or arrivals to be included in the MOU white lists or Qualship 21 program.

In order to be identified in this way with respect to the Paris and Tokyo MOU white lists, a flag must have undergone at least one inspection in the previous three years. With respect to the Qualship 21 program, a flag must have made at least three distinct arrivals in each of the previous three years. This is in alignment with the way in which the PSC authorities present this information. Some flag states may therefore not receive a positive indicator despite having experienced zero detentions.

There are various other regional and national PSC regimes worldwide, but in the interests of simplicity this Table only uses data from the three principal regional PSC authorities.

Ratification of Conventions

Source: IMO report 'Status of Conventions', IMO website (www.imo.org), ILO website (www.ilo.org) (all as at January 2025).

The criteria for the Conventions listed in the Table are:

International Convention for the Safety of Life at Sea, 1974 as amended (SOLAS 74) – includes the 1988 Protocol.

International Convention on Standards of Training, Certification and Watchkeeping for Seafarers, 1978 as amended (STCW 78) including the 2010 amendments.

International Convention for the Prevention of Pollution from Ships, 1973 as modified by the Protocol of 1978 (MARPOL 73/78) – the Table includes one column for the ratification of MARPOL and its mandatory Annexes I (oil) and II (bulk chemicals); and a second column for the remaining Annexes III (dangerous packaged goods), IV (sewage), V (garbage) and VI (atmospheric pollution).

International Convention on Load Lines, 1966 (LL 66) – includes the 1988 Protocol.

ILO Maritime Labour Convention, 2006 (ILO MLC).

International Convention on Civil Liability for Oil Pollution Damage, 1992 and the **International Convention on the Establishment of an International Fund for Compensation for Oil Pollution Damage, 1992** (CLC/Fund 92) – includes the 1992 Protocols.

Recognized Organization

Performance Tables as published in both Paris MOU Annual Report 2023 (published in 2024); Tokyo MOU Annual Report 2023 (published in 2024).

Average Age

Source: UNCTAD Stats Database (available at <https://unctadstat.unctad.org/datacentre/dataviewer/US.MerchantFleet>).

Second register ships are incorporated under main national register. Includes trading ships over 100 gross tonnage.

Reports

Sources: Report of the ILO Committee of Experts on the Application of Conventions and Recommendations 2023; MSC.1-Circ.1163-Rev.13

IMO Attendance

Source: IMODOCS 'List of Participants' for the following meetings: MEPC 79, 80, 81 and 82; MSC 107, 108 and 109; LEG 110 and 111; Assembly 33.

IMO Audit Scheme

Source: IMODOCS 'IMO Member State Audit Scheme' for Council 133-8, 'Progress report on the implementation of the scheme'.

As part of an ongoing joint campaign with the Comité Maritime International (CMI), ICS produces the 'Promoting Maritime Treaty Ratification'. This free resource is available to download from the ICS website and highlights the need for governments to ratify and implement maritime conventions adopted by the IMO, the ILO and other United Nations bodies that impact on shipping.



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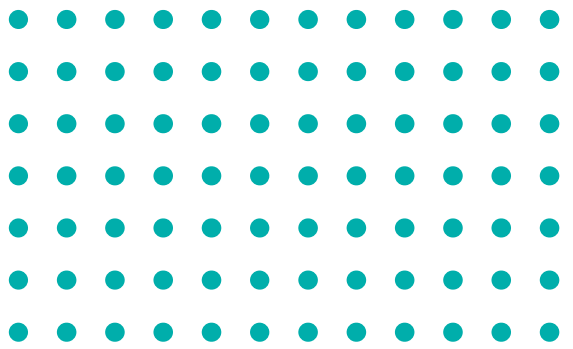
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