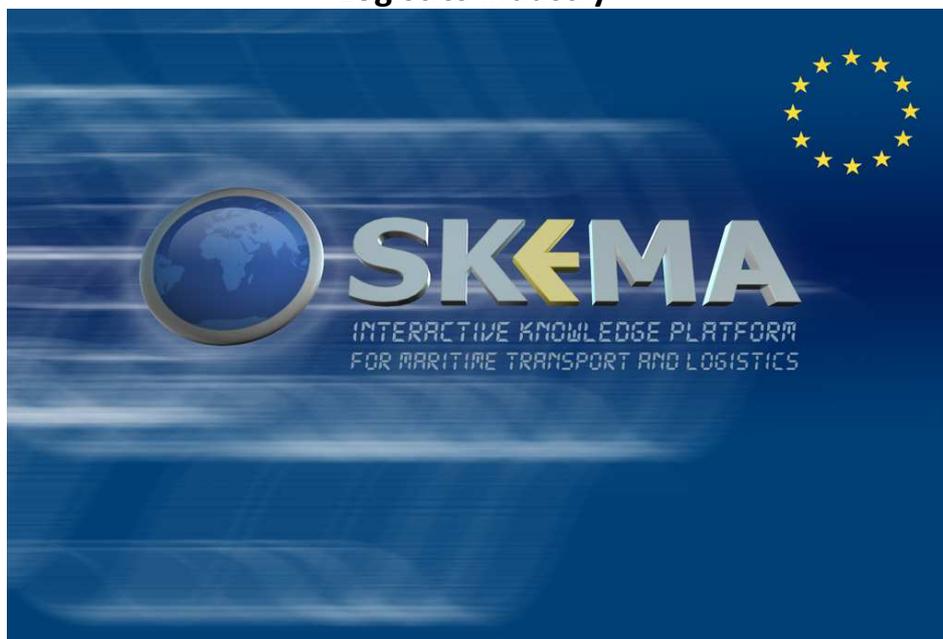


SEVENTH FRAMEWORK PROGRAMME
SST-2007-TREN-1 - SST.2007.2.2.4. Maritime and logistics co-ordination platform
SKEMA Coordination Action
“Sustainable Knowledge Platform for the European Maritime and Logistics Industry”



SKEMA e-Maritime Initiative Periodic Study

Task 4 Report: Stakeholder Workshops and Surveys

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| Role | Persons | Organisation | Project Role |
| Authors | Gerry Trant, James Kehoe | Nautical Enterprise Centre Ltd | Participant |
| Contributors | SKEMA Partners, PROPS Partners, Participants at SKEMA workshop in Dublin Port (22 nd Jan.'08), Participants at PROPS workshop in London (24 th Feb.'09) | Various | Participants |
| Reviewer | Gráinne Lynch | Nautical Enterprise | Study Coordinator |

Quality Control

| | Who | Date |
|-------------------------|-----------------------|----------|
| Checked by WP Leader | Prof. Johan Woxenius | |
| Reviewed and edited by | Heather McLaughlin | 19.01.10 |
| Approved by Coordinator | Dr. Takis Katsoulakos | |

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1. The Survey

As a contribution to the Periodic Study on e-Maritime, a survey was carried out to determine stakeholders' opinions on how the e-Maritime initiative would have the greatest positive effect on the maritime & logistics industry. The survey document was prepared in consultation with SKEMA participants, following a seminar on e-Maritime in the Global Policy Institute in London on the 18th November '08. The survey was presented and completed by 23 participants in the SKEMA workshop held in Dublin Port on the 22nd of January '09.

After reviewing the results from the survey and in collaboration with SKEMA partners & Dublin workshop participants, an additional section was added to the survey. The amended survey was presented and completed by 40 participants in the PROPS workshop held in London on the 24th of February '09.

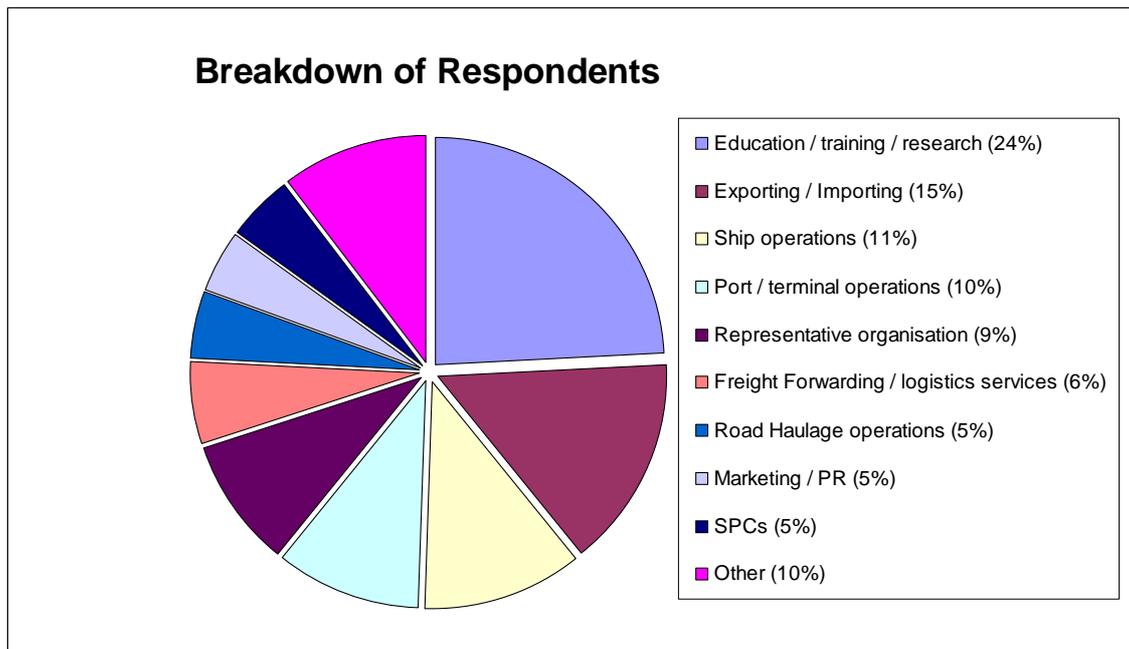
The survey contained a total of 28 statements of possible e-Maritime interpretations to which respondents could select:

| | | | |
|---------------|----------|--------------|------------|
| Very Relevant | Relevant | Not Relevant | No Opinion |
|---------------|----------|--------------|------------|

Provision was made for a 'Comments' section to enable respondents add further information if they should so wish. The results from the two surveys were combined and ranked in terms of statements that were deemed to be most relevant in relation to e-Maritime.

Survey Respondents

The respondents to the two surveys were comprised of individuals from the following sectors:



Note: Some Respondents were participants in more than one sector.

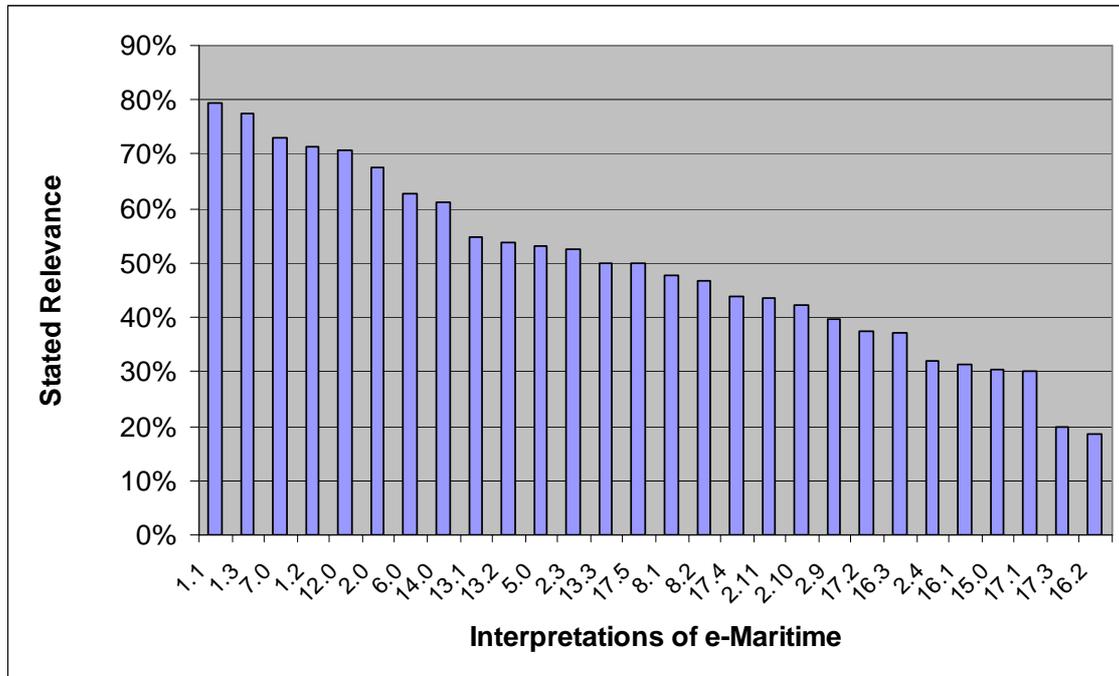
The **'Others'** in the above Pie-Diagram were composed of:

| | |
|--------------------------------|---|
| Railway Operators | 2 |
| Regulatory / customs officials | 2 |
| Government officials | 2 |
| Warehousing Manager | 1 |
| IT Provider | 1 |
| Consultant | 1 |

It is evident from the profile of Survey Respondents that they are representative of a cross-section of the maritime & logistics industry, and their participation at the workshops is indicative of their interest in their industry. The results, therefore, are a fair representation of the view of the industry on e-Maritime at this point in time.

2. Results of the Survey

The combined results of the two surveys are shown in the graph below.



The x-axis (Interpretations of e-Maritime) in the above graph shows the reference numbers assigned to each e-Maritime statement, ranked in order of Stated Relevance.

The Stated Relevance for each statement that was presented was computed on the basis of the following assignment of points:

- +4 points for 'Very Relevant',
- +2 points for 'Relevant',
- 4 points for 'Not Relevant',
- 0 points for 'No Opinion'.

The points were then added up for each e-Maritime statement and presented as a percentage of the maximum possible points, which was the number of responses multiplied by 4.

Detailed results of the survey:

| e-Maritime Statement | Rank | Score % | Stat. No. |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|---------|-----------|
| e-Maritime could contribute to the efficiency and competitiveness of maritime transport through a paperless flow of information on the transportation of goods. | 1 | 79 | 1.1 |
| e-Maritime could contribute to the efficiency and competitiveness of maritime transport by means of a simplification of administrative reporting through a 'single window' reporting interface. | 2 | 77 | 1.3 |
| e-Maritime could be closely related to the e-freight initiative , which deals with the framework for delivering electronic freight-related messages and the content of the messages, thus providing an electronic flow of information associated with the physical flow of goods. | 3 | 73 | 7.0 |
| e-Maritime could contribute to the efficiency and competitiveness of maritime transport by means of the provision of single transport document for all modes. | 4 | 71 | 1.2 |
| e-Maritime could assist in achieving and implementing harmonized standards in Europe for port and customs clearance . | 5 | 71 | 12.0 |
| e-Maritime could support the promotion of innovation in transport logistics through greater use of information & communication technologies. | 6 | 67 | 2.0 |
| e-Maritime could support the objective of achieving a European maritime transport space without barriers to facilitate intra-European maritime transport and to put it on an equal regulatory footing with land transport, thus achieving a level playing field between transport modes. | 7 | 63 | 6.0 |
| e-Maritime could facilitate cooperation between all competent authorities having an interest in maritime traffic and the transport of goods in EU waters. | 8 | 61 | 14.0 |
| e-Maritime could be supportive of an integrated approach , encompassing legal, organisational, technological and human factors for port and coastal safety solutions. | 9 | 55 | 13.1 |
| e-Maritime could be supportive of an integrated approach , encompassing legal, organisational, technological and human factors | 10 | 54 | 13.2 |

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| for port and coastal security solutions. | | | |
| e-Maritime could improve the efficiency & sustainability of freight transport in urban environments through facilitating the tracking and monitoring of freight movements bound for or from ports. | 11 | 53 | 5.0 |

Detailed results of the survey (Cont. 1):

| e-Maritime Statement | Rank | Score % | Stat. No. |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|---------|-----------|
| e-Maritime could help to improve the quality of logistics services by addressing many of the bottlenecks ¹ that create unnecessary obstacles to the efficient flow of goods with respect to maritime transport. | 12 | 52 | 3.0 |
| e-Maritime could be supportive of an integrated approach , encompassing legal, organisational, technological and human factors for port and coastal solutions for environmental protection. | 13 | 50 | 13.3 |
| e-Maritime could be supportive of reinforcing vessel traffic monitoring within Europe through the availability and quality of electronic information . | 14 | 50 | 17.5 |
| e-Maritime could advance the objective of achieving Green Transport Corridors by supporting the certification and auditing of energy efficiency systems in transport operations and networks, based on the determination of the carbon footprint for door-to-door transport of a unit of cargo for different transport modes and combination of modes using acceptable computational models. | 15 | 48 | 8.1 |
| e-Maritime could advance the objective of achieving Green Transport Corridors by supporting the certification and auditing of energy efficiency systems in transport operations and networks, based on facilitating the introduction of energy efficiencies that would reduce carbon footprints and improve overall operational efficiencies because of the ubiquitous nature of energy usage. | 16 | 47 | 8.2 |
| Through the availability and quality of electronic information, e-Maritime could support the effectiveness of Port State Control through the availability of their information to agencies that have a | 17 | 44 | 17.4 |

¹ **Bottlenecks** can be classified as being Infrastructural Bottlenecks (chronic or temporary), Regulatory Bottlenecks (direct or indirect), Supply Chain Dysfunctional Bottlenecks (labour, corporate, or information).

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| legitimate interest in maritime safety and surveillance. | | | |
| e-Maritime could assist in the provision of information relevant to the formulation of strategic decisions on infrastructural developments , based on the relationships between transport efficiency, the facilitation of trade and the consequential increase in wealth generation. | 18 | 44 | 11.0 |

Detailed results of the survey (Cont. 2):

| e-Maritime Statement | Rank | Score % | Stat. No. |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|---------|-----------|
| e-Maritime could be supportive of the formulation of optimal transport strategies for different freight segments in a transport corridor, based on cargo flow data for the freight segments and the transport preferences of shippers. | 19 | 42 | 10.0 |
| e-Maritime could support the Lisbon Objective of the EU becoming the most competitive knowledge-based society in the world by 2010. | 20 | 40 | 9.0 |
| e-Maritime could be supportive of raising safety standards for ships and seafarers through two-way information flows and risk profiling of different situations. | 21 | 38 | 17.2 |
| e-Maritime could be supportive of the formation of strategic alliances in intermodal transport networks through the presentation of Service Level Agreements (SLAs) that have proven to be successful under different circumstances and that take cognizance of the risk exposures of different stakeholders. | 22 | 37 | 16.3 |
| e-Maritime could facilitate the detection and management of illicit and dangerous cargoes by customs and harbour authorities respectively, through profiling of ship manifests presented in a standard digitized format. | 23 | 32 | 4.0 |
| e-Maritime could be supportive of the formation of strategic alliances in intermodal transport networks through the determination of the benefits and risks to the different stakeholders of participating in an effective alliance. | 24 | 31 | 16.1 |

| | | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|----|------|
| e-Maritime could be instrumental in carrying out integrative training programmes for the diverse range of participants ² in the transport & logistics industry, such training programmes being prepared and monitored by a cooperative group of European universities and colleges. | 25 | 30 | 15.0 |
| Through the availability and quality of electronic information, e-Maritime could be supportive of emergency response activities, such as Search & Rescue (SAR) and Oil Pollution Response Centres (OPRC) | 26 | 30 | 17.1 |

Detailed results of the survey (Cont. 3):

| e-Maritime Statement | Rank | Score % | Stat. No. |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|---------|-----------|
| Through the availability and quality of electronic information, e-Maritime could provide back-up for shipmasters and ship crews , hence reducing the possibility of excessive pressure or of exploitation. | 27 | 20 | 17.3 |
| e-Maritime could be supportive of the formation of strategic alliances in intermodal transport networks through the identification of structural hindrances to the formation of an alliance, the costs of such hindrances to stakeholders and possible solutions for their resolution. | 28 | 19 | 16.2 |

3. Conclusions

As a contribution to the Periodic Study on e-Maritime, a survey was carried out to determine stakeholders' opinions on how the e-Maritime initiative would have the greatest positive effect on the maritime & logistics industry. The survey consisted of a 28 statements with respondents asked to what extent they thought they were relevant.

The e-Maritime statements that were used in the survey are not necessarily the totality of options for e-Maritime. They do, however, provide a basis for examining the objectives and activities of e-Maritime. For analysis, the e-Maritime statements were put into three generic groups based on the general area to which the statement related. The table shows that most stakeholders considered that e-maritime had the greatest role to play in increasing efficiency.

² Participants in the transport & logistics industry: People engaged in ship operations, port & terminal operations, haulage operations, train operations, freight forwarding, stevedoring, ship & port agencies, regulatory functions including customs, health & safety, security, police and animal welfare.

| Ref. | Generic Grouping of e-Maritime Statements | No. of Occurrences | Rank Ref. No's |
|-------------|------------------------------------------------------------------|---------------------------|------------------------------------------------------------|
| 1 | Improved Maritime Transport & Logistics Efficiencies | 16 | 1, 2, 3, 4, 6, 11, 12, 16, 18, 19, 20, 22, 24, 25, 27, 28. |
| 2 | Improved Regulatory Efficiencies | 9 | 2, 5, 7, 8, 9, 10, 17, 23, 26. |
| 3 | Improved Safety, Security, Environmental Management Efficiencies | 5 | 13, 14, 15, 16, 21 |
| | Total | 30 | |

Note:

- a. The total number of occurrences is 30, two more than the number of statements (28). This is because two statements are applicable to more than one generic group.
- b. Ref. 2 & 3 relate primarily to regulatory authorities and, hence, the distinction between them is rather fine. Also, the improved efficiency of regulatory activities has a strong positive bearing on maritime transport & logistics operations.