



Summary report of the contributions received to the e-Maritime public online consultation

1. INTRODUCTION

The European Commission has committed itself to improve the competitiveness of the European maritime transport sector and recognises e-Maritime initiative as being one of the key initiatives in this field.

The e-Maritime initiative builds upon the guidelines set in the Lisbon Agenda and the White Paper on Transport policy. Furthermore, in the White Paper Mid-term review the European Commission states that it will propose measures for the implementation of e-Maritime systems. Also the directive on the creation of a European maritime transport space without barriers, and the directive regarding the EU Maritime Transport Strategy 2018 are specifying the need to establish an e-Maritime framework.

e-Maritime is an ambitious initiative which affects a large number of stakeholders, both public and private, from various maritime transport sectors. It is therefore necessary to assess the possible impacts before drafting the legislative proposal and the communication on the EU e-Maritime.

The aim of this public online consultation was to collect views on e-Maritime in order to assess the stakeholder support for the proposed measures and to hear stakeholders' opinion on the potential impacts. This information will help the Commission to identify possible policy options for the EU e-Maritime initiative.

The public consultation was launched on 26 April and stayed opened until 27 June - the length of the consultation period being therefore eight weeks and six days. The questionnaire had 19 questions of which five were compulsory and 14 were optional.

This report seeks to assist stakeholders to obtain an overview and to present the responses reflecting the major positions of the stakeholders. The report does not intend to summarise all of the comments made by respondents. However, all comments were considered, whether or not they appear in the report.

Some contributions were received by mail after the closing date. Those contributions are not taken in account in this document but they will be examined separately.

2. RESPONDENTS

The public consultation elicited much interest from a broad range of organisations, public authorities and individuals. All together, the European Commission received a total of 102 contributions, 37 by individuals, the remaining 65 by organisations.

2.1. By sector

Respondents were asked to indicate in which sector(s) they are engaged. Choosing multiple sectors was permitted due to varying practices and responsibilities of industry and authorities from one Member State to another, e.g. ownership arrangements of a port maybe public or private.

Jointly ‘Ship owners’ and ‘Ship operators’ were the largest participating group with 34% of the respondents indicating an involvement with the sector, while ‘Port authorities’ were the single largest sector to take part in the consultation. ‘Education / training / research organisations’, ‘Maritime authorities’, ‘IT providers’, ‘Harbourmasters’ and pilots followed closely behind.

Sectors	Replies
Port authority	25
Educational / training / research organisation	24
Maritime authority	20
IT provider	18
Ship operator	18
Ship owner	17
Harbourmaster	16
Pilotage	16
Other	14
Ship brokers and agents	12
Port state control	11
Terminal operator	10
Freight forwarders/logistic services	10
Multimodal transport operators	9
Customs operators	8
Shortsea Promotion Centre	7
Coast guard	6
Cargo handlers	5
Stevedores	5
Shippers / receivers	5
Exporting/importing agents	5
Maritime law / insurance	5
Rail/truck operators	4
Ship crews; seafarers' trade union/worker's organisation; etc	4
Vessel inspection: Classification society	4
Entities responsible for health; veterinary and phytosanitary controls	3
Inland terminals	3
Marketing / PR	2
Dockers	1
Large producers / retailers	1

2.2. Familiarity

Respondents were asked to comment on their level of familiarity with the EU e-Maritime initiative. A quarter considered the topic as being very or fairly familiar to them, and only 8% of respondents said that it was new to them.

3. CONSULTATION

The questionnaire was divided into five subtopics.

- 1) General questions
- 2) Applications
- 3) Proposed measures
- 4) Potential impacts
- 5) Final considerations

Each subtopic was presented to the respondents with a preceding section explaining the present situation and introducing the rationale behind the questions.

Some respondents elaborated the answers further by giving detailed comments on the technical implementation of the e-Maritime platform or on the presented applications. These comments have been noted but they are not summarised in this document where the focus is on broader objectives of the EU e-Maritime framework.

The comments collected in this consultation have been summarised and structured in order of appearance in the questionnaire.

Opinions outlined in the present report do not necessarily reflect the view of the Commission.

4. PRESENTATION OF RESPONSES

4.1. Summary

There is a consensus that the EU e-Maritime initiative is important and worthwhile.

There is widespread support and agreement that maritime reporting data should be submitted electronically and only once. Therefore, notwithstanding the importance of the other proposed measures, the technical standardisation process and the implementation of National Single Window emerge as measures receiving the highest support.

With regard to possible applications, the general opinion is that administrative domain applications are more urgent than others

Given the complexity of the initiative and the desired priority for administrative applications, a step-by-step approach should be considered.

A large number of respondents stress that it is essential to establish an open, comprehensive and regular coordination with all stakeholders involved at European and international levels.

There should be careful evaluation as to whether applications in the business domain require public intervention or could be left for the industry to develop.

4.2. General questions

Despite the progress achieved in recent years in maritime transport information systems, there are a number of underlying problems affecting efficiency, performance and quality of services related to maritime transport.

Most important operational problems the EU e-Maritime initiative should address

Among the respondents there is general agreement about the following problems in the maritime transport sector:

- due to the international dimension and cultural reasons the sector is fragmented;
- in addition to EU legislation and international agreements, national legislations impose different requirements on ports and ships operating in different Member States;
- the lack of harmonisation and homogeneity leads to different procedures in public administration and businesses in different Member States, regions or even local operators.

There is a general recognition that the lack of common reporting templates or data structures, lack of established procedures and lack of data sharing and interoperability causes unnecessary reporting duplications, wastes resources, and increases the probability of errors.

Level of investment in information systems

The question on the level of investment used for the information systems elicited divergent views from low to high.

Most of the respondents agree that the level of investment by smaller ports or smaller companies is generally quite low, with some still even working with faxes and making carbon copies with typewriters.

On the other hand, as pointed out by various stakeholders, the investment to on-board communication systems has increased significantly during the last decades and many major ports have invested heavily in port community systems. Some respondents also note that some Member States have already made considerable investments in Single Window developments.

A few respondents mention that the level of investment in Europe is low compared to that in Asia.

4.3. Applications

The e-Maritime Applications will demonstrate the potential benefits of e-Maritime in real life situations involving maritime stakeholders across Europe. The applications are listed in application domains in order to ensure focus of specific stakeholders needs and compliant with the global principles for interoperability. The questionnaire asked respondents to comment on the structure, importance and additional benefits of the 28 example applications in 5 application domains:

- Administration applications,
- Ship operation applications,
- Port/Terminal operations applications,
- Transport logistics applications and
- Applications improving life at sea and promoting seafaring.

Structure of the EU e-Maritime domains

The proposed application structure is well received. Some contributions mention the potential overlap with certain domains, namely the Administrative and Port application ones. An alternative approach of grouping the domains by categories of users is also proposed by one respondent.

Applications evaluated

The Single Window is regarded as the key application by nearly everyone or, as one of the respondents phrases it, as "the essence of the e-Maritime initiative".

With regard to the other applications, the respondents have more divided views. The following table presents the top 11 applications ranked in order of the support received by the respondents. The Administration domain has 6 of the top applications.

Rank	Application	Domain
1	Support for National Single Windows, one-stop-shop developments or a European Single Window including common reporting interface and dynamic integration with existing ones	Administration
2	Establishing co-operative transport networks and integration of short-sea-shipping into logistics	Transport logistics
3	Support for compliance to and enforcement of regulations	Administration
4	Improved interoperable maritime surveillance/monitoring systems for traffic, ship and cargo facilitating EU and national administrations to collaborate in safety, security and environmental risk management in support of proactive or remedial operations	Administration
5	Integrated systems for monitoring, evaluating and managing situations including improved risk assessment and decision support systems	Administration
6	Improved automation in ship reporting	Ship operation
7	Solutions for more effective and coordinated controls and inspections	Administration

8	Fleet and ship routing and scheduling	Ship operation
9	Integration of Port Single Windows with national and international web portals	Port / Terminal operations
10	Delivering an EU system for statistical data on maritime transport	Administration
11	e-Learning and e-training for career development both at sea and in land	Life-at-sea

As some respondents point out, each sector has its own business processes and, therefore, the value of the application depends on the sector.

The other applications also receive positive comments.

Many of the contributions stress that the e-Maritime initiative should first focus its efforts on the Administrative domain applications, namely the Single Window, before considering others.

Many respondents are concerned about the possible applications which could be used to manage commercial data flows and thus interfere with the normal business practices. The respondents suggest that such applications should be left to be developed by the industry.

Also some contributions pointed out that there are applications which benefits can not be evaluated fully without further information.

Many respondents also provide new ideas on possible applications: a shore based pilotage; a harmonised decision support system; applications for automated multimodal management and for establishing interoperability with international supply chains, linking with Single Windows of Asia, Africa and America for inbound/outbound information. A number of respondents mention the need to look more closely at e-Maritime applications that depend on the weather and ocean environment and to develop those together with the meteorological and oceanographic community.

One respondent suggests considering technical facilities supporting the broadband connections rather than developing the Life-at-Sea applications itself, as those would naturally follow if the means are in place.

Additional benefits

The respondents consider that there are a number of additional benefits which could emerge on the different fields from the e-Maritime applications:

Safety, security, data reliability

- Overall increase of safety
- Enhanced security along sea borders and co-operation with security agencies
- Correct, timely available and adaptable data
- Ship defects could be transmitted more easily to the relevant authorities in the next port
- Reliable access to up-to-date information for pilots and bridge team
- Reduced distraction of ship officers as a result of automated reporting

- More efficient ship inspection regimes based up ship profiling
- Reliable platform to exchange data is valuable for safety and business processes
- Knowledge of the cargo that the maritime industry is transporting – both intra-EU cargo as well as the EU's international trade

Research, education, future initiatives

- Assist in streamlining, coordinating and simplifying numerous current and future initiatives
- More comprehensive base to deliver training services
- Standardised system allows production of comprehensive teaching material
- Better statistics are very valuable for research
- Common platform identifies stakeholders and generates the exchange of ideas between them.

Business, planning

- Harmonised standards and processes are fostering the development of the maritime transport ICT sector
- Supports the single market
- Statistics allow the forecasting of trends that could be used to calculate the economic development and benefits.
- The definition of this framework can effectively be used by consultants and service providers to link their services within the proposed framework
- Sets essential milestones for basic functions of a competent port administration
- Uniform way of capturing data regarding port traffic, moment and volumes helps to forecast the trends that affects the ports, strategies and future developments

4.4. Measures

The Commission presented eight measures for evaluation:

M1 Guidance, information and support on interoperable e-Maritime systems

M2 Actions to define e-Maritime standards

M3 Measures to require the implementation of National Single Windows

M4 Measures to support stakeholders in implementing the necessary e-Maritime ICT infrastructure

M5 Actions to support the intelligent use of data

M6 Actions to optimise traffic inside and around ports

M7 Actions to support e-services for seafarers

M8 Measures to support ship-shore broadband communication

In the questionnaire each measure was followed by a short description of the purpose of the measure and with possible examples, if any.

Measures evaluated

The questionnaire asked each respondent to indicate whether a proposed measure is considered as very important, important, not important or if they had no opinion on it.

Figure 1 shows the importance of the measures given by the respondents when comparing the answers which rated the measures as "Important" and "Very important" against those which rated them as "Not important".

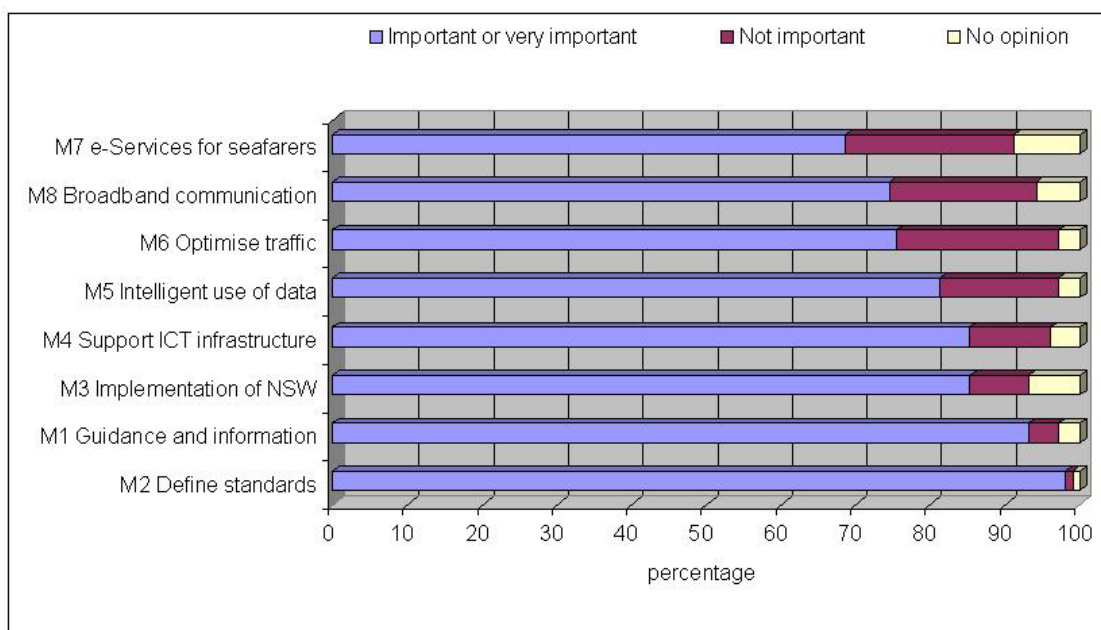


Figure 1, Important and Very important vs. Not important

As can be seen from Figure 1, all of the measures are considered important or very important by minimum of a 60% of respondents. The measure proposing to define e-Maritime standards receives strong support and practically no opposition.

Figure 2 places the measures in order by percentage of contributions considering a measure as very important.

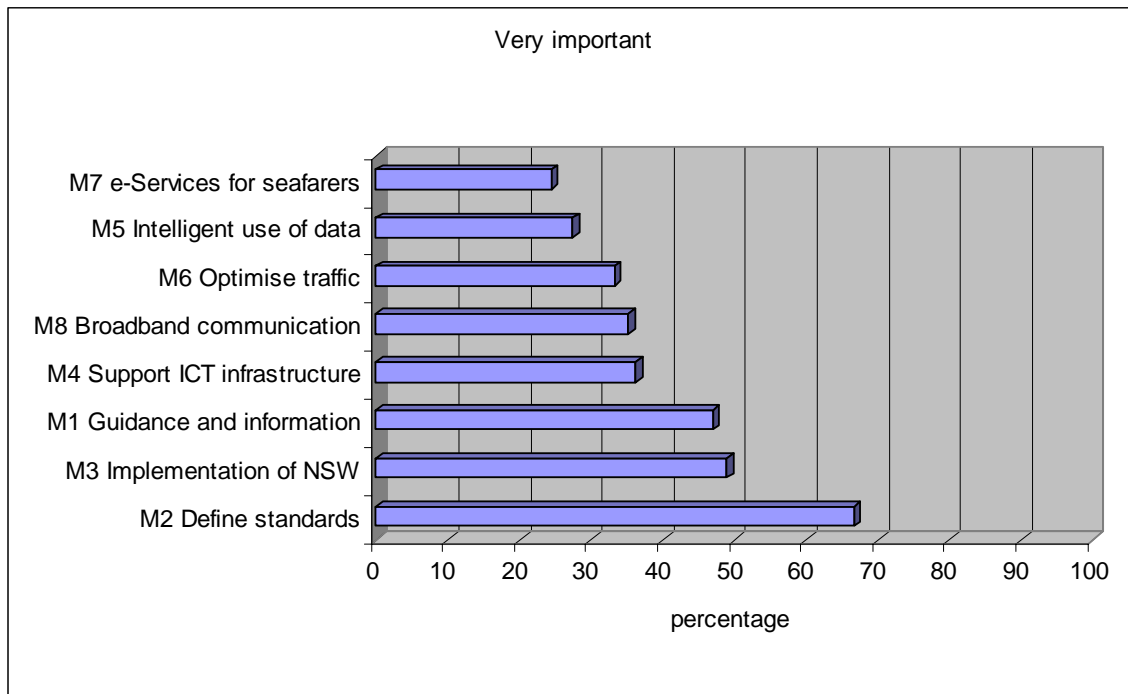


Figure 2, Percentage of respondents considering a measure very important

Closer to 50% of the respondents consider also the measures M1 and M3 as being very important.

Measure M6, e-Services for seafarers, receives least support. A possible reason for this, based on comments made by some of the respondents, is that the e-Services for seafarers primarily focus on one defined sector, and thus receives little support from the respondents of other sectors.

Other possible measures

Respondents generally agree that all the necessary measures are listed. Some new measures are proposed but those can be considered as part of those already listed rather than a measure by itself. For example proposals related to data protection or coordination with e-Navigation or other relevant interest groups are part of measures M1 and M2, and any other measure where necessary.

Measures considered most important

The most highly valued measures are those already presented in Figures 1 and 2, i.e. M2, M3 and M1.

However, a difference can be noted between some sectors. While there is a strong support for the three first measures by all respondents, a number of pilots, harbour masters, research institutions, IT and hardware providers mention the measure M8

(Measures to support ship-shore broadband communication) as the most important one. Interestingly, as can be seen in Figure 1, this measure is not so well rated in the evaluation. The respondents who support this measure are emphasising that a good broadband connection would facilitate all the other measures.

European Single Window

More than half of the contributions fully support the idea of establishing a European Single Window (ESW). One quarter of the answers support it with some reservations and about 10 percent do not see a need for this kind of central system.

There are some concerns that flexibility, which is relevant for national requirements, would be lost. One respondent is concerned about the complexity of implementing such a system.

Nearly all of those opposing the European Single Window endorse the view that interoperable existing systems or National Single Windows remove the need for any centralised system.

4.5. Potential impacts of the measures

The European Commission asked the respondents to provide their views on the possible impacts associated with the EU e-Maritime initiative.

- (1) Modal share: impacts on the number of travellers or tonnes of freight which will be diverted from other transport modes to the maritime mode;
- (2) Efficiency of maritime operations: impacts on the rationalisation of the port and ship operations through the provision to transport users with real time information on available infrastructures, etc.;
- (3) Reduction of administrative burdens: impacts in terms of number and complexity of transactions for a single port call, lead time of the custom operations and number of electronic transactions;
- (4) Safety: impacts in terms of reduction of accidents;
- (5) Job quality in terms of improved access for the workforce to professional development on e-training services, improved communication facilities and improved information, education and entertainment services;

Impacts evaluated

The respondents were asked to select from one of the five possible impacts: very negative, negative, no impact, positive or very positive.

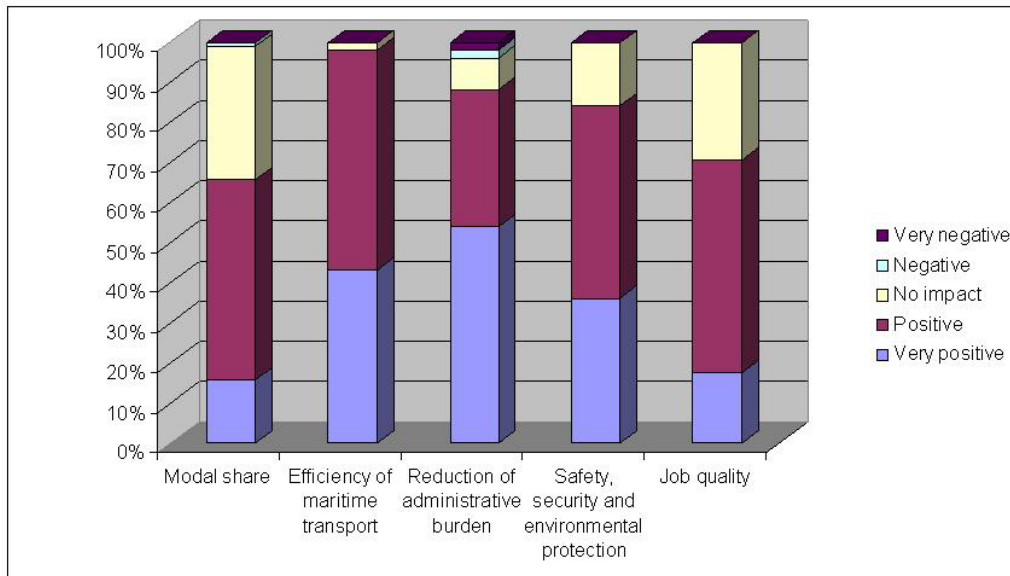


Figure 3, Impacts evaluated

The answers suggest that a strong positive impact could be expected in terms of the ‘Efficiency of maritime transport sector’. Practically no negative impact is predicted with regard to any of the five areas. The ‘Modal share’ is regarded as the least affected by the EU e-Maritime initiative.

Other possible impacts

Three respondents are concerned about the impacts to ships agents and they stress that their role as central coordinators for port operations has to be recognised. One response also mentions that the impacts on non-EU vessels should be assessed. Two contributions suggest that the EU e-Maritime initiative will have positive impacts on combating illicit trade. A positive impact on the cooperation and coordination between authorities is mentioned by two respondents.

Type and scale of impacts

There is a strong consensus among the respondents that the e-Maritime initiative will have a very positive and serious impact on the ‘Efficiency of the maritime transport sector’.

A few contributions note that there could be negative impacts if e-Maritime compete with other regional or international initiatives or if the industry is not properly consulted.

4.6. Final considerations

Data for assessing the impacts

Respondents were asked to suggest what kind of data could be used to assess the impacts on the proposed measures.

Most of the responses proposed collecting data related to reduction in waiting time:

- Time gained when performing different duties on-board, in ports or in HQ

- Waiting time for vessel at berthing, arrival and clearing of cargo
- Waiting time for trucks before loading or unloading
- Time taken to perform certain reporting operations

A number of respondents also propose the use of data related to numbers:

- Number of reporting requirements per vessel call and to how many national authorities
- Number of transmission per vessel call and to how many national authorities
- Number of reporting requirement and transmission per vessel call in the EU and to how many member states
- Number of ports equipped with e-Maritime services
- Number of vessels accessing e-Maritime applications
- Number of multimodal links benefiting from e-Maritime
- Number of personnel working on reporting operations
- Number of inspections (reduction due to coordination or focusing)
- Number of seafarers from the EU
- Percentage of centralised customs clearances of all customs clearance

Two respondents proposed the use of Key Performance Indicators, such as World Bank Logistics Performance Index (LPI).

Problems during the implementation of the EU e-Maritime components

According to the majority of contributions there, are two key issues which could emerge and thus should be carefully tackled in order to make e-Maritime a success: failure to manage change and lack of coordination. Failure to manage change will cause reluctance and resistance to the adoption of new systems or procedures. Lack of coordination can cause overlapping, contradictions and conflicts with other initiatives. Both problems could slow down the progress, reduce the benefits and increase the costs.

The respondents propose the same general solution to avoid both of these problems: comprehensive, continuous and open information sharing and consultation with all parties (sectoral, regional, national and international).

Numerous respondents stressed the need to ensure the confidentiality and the reliability of data, without which EU e-Maritime initiative would fail.

Other comments

A number of contributions also provide some suggestions on the issues that e-Maritime could address.

A number of respondents note that it is important to link e-Maritime with other relevant systems and initiatives, such as eNavigation, eCustoms and eFreight.

Two of the respondents propose to use the EU e-Maritime initiative for promoting the use of English as a single language for reporting. In contrast, another respondent, who also considers the language issue to be important, mentions that the e-Maritime

applications could be developed in the same way as European automated banking systems in different languages.

Three contributions ask the Commission to come up with an agreed plan of implementation and a step-by-step process.

Creating an inventory of existing systems is also proposed by few respondents.

One respondent proposes the legal obligation of the authorities to maintain a list of web addresses for available online reporting systems.

One response suggests paying close attention to the inland waterway and river transports as enhanced integration and data links would make the short sea shipping more competitive with other modes.

One respondent welcomes e-services for seafarers and emphasises that seafarer training should be developed as strategy for total career development, with maritime & logistics shore employments being practical progressive paths. e-Maritime could be central to the delivery of continuous professional and personal development programmes within a total career strategy.

Finally, a number of stakeholders express their strong support for the EU e-Maritime initiative and acknowledged the Commission's involvement in the well written and clear questionnaire which introduced the EU e-Maritime initiative comprehensibly.