



**PORT of
vancouver**

ICSER Update Survey Results and Next Steps

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June 14, 2019

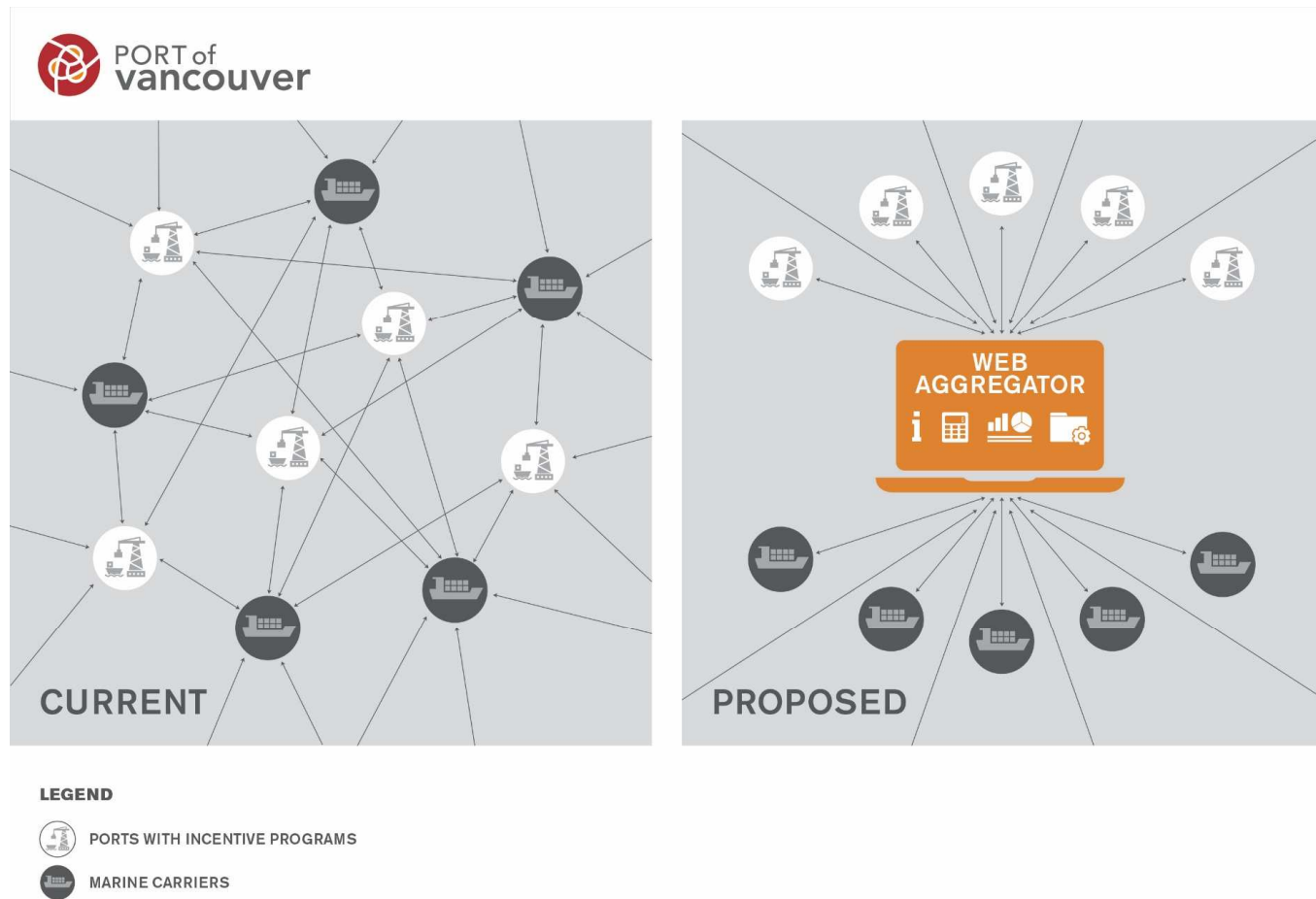
Process

- 3 surveys:
 - Marine carriers and related associations
 - Ports, governments and related associations
 - Other stakeholders
- Surveys open February 20 - April 10, 2019 (7 weeks)
 - Launched by email
 - Three broad email reminders
 - One round of individual email follow ups where no responses received
- 137 surveys received
- www.porttalk.ca/ship-incentive-collaboration
- Support by ERG and EERA

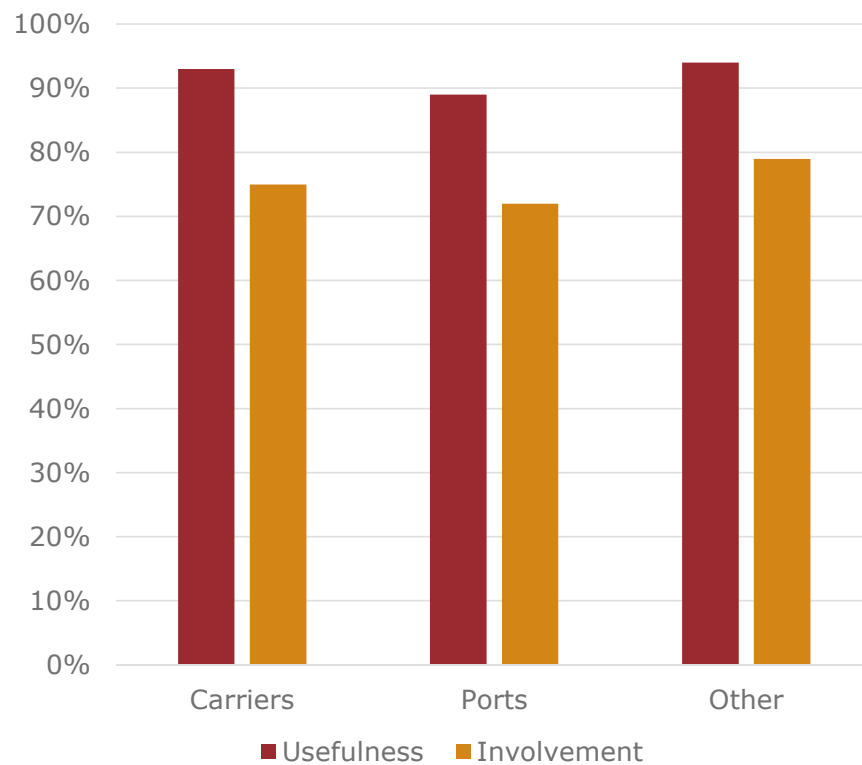
Media

- GreenPort newsletter March 5 (email)
- Port Strategy newsletter March 5 (email)
- Ports & Harbours magazine
- Port Strategy magazine
- IAPH Insider newsletter March 7 (email)
- World Ocean Council newsletter March 13 (email)
- Safety4Sea news article March 13 (web)
- IAPH Insider newsletter reminder April 4 (email)
- GreenPort magazine May 8

Proposal

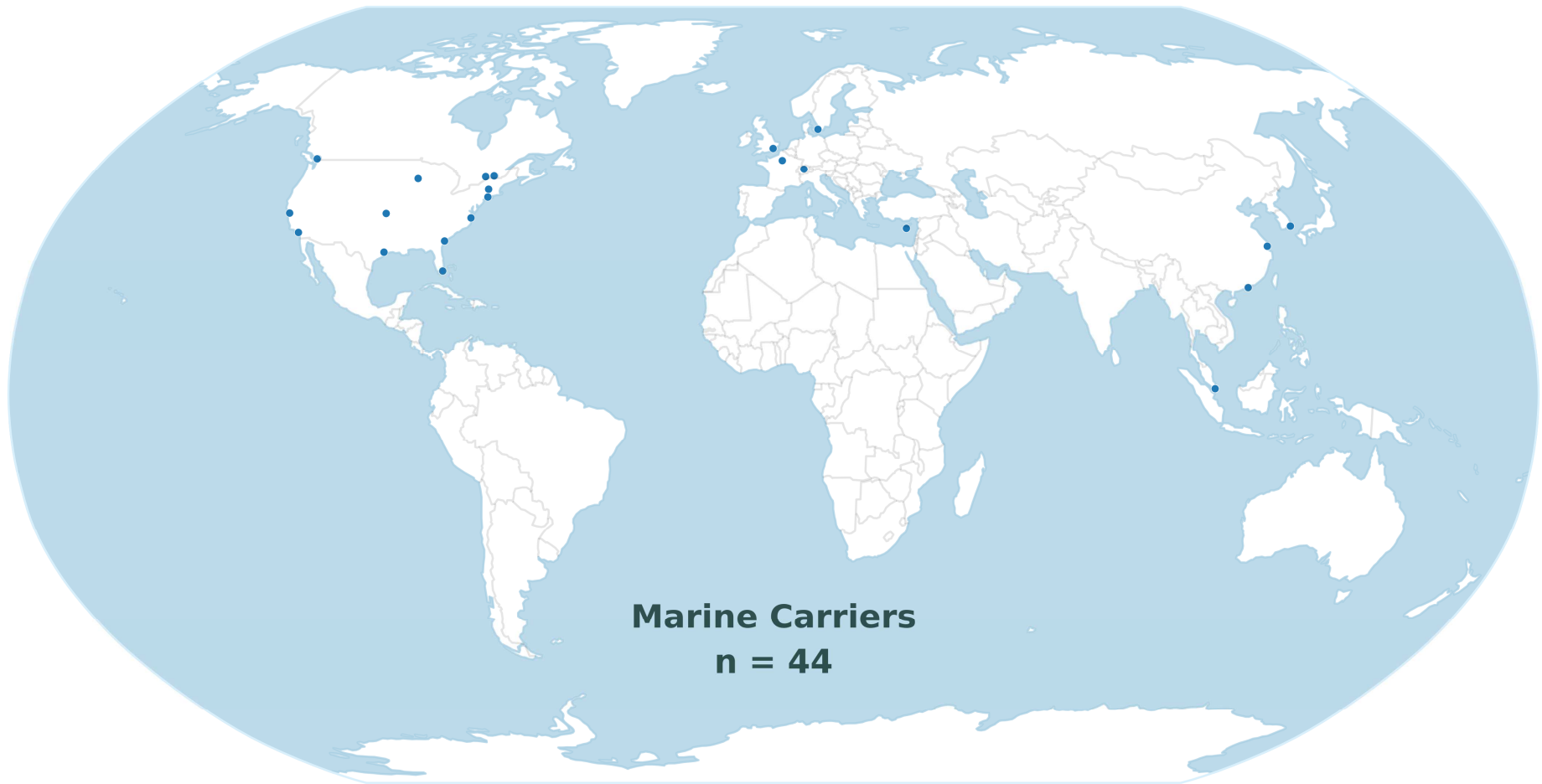


All Stakeholders-Phase I Stakeholder Engagement Survey

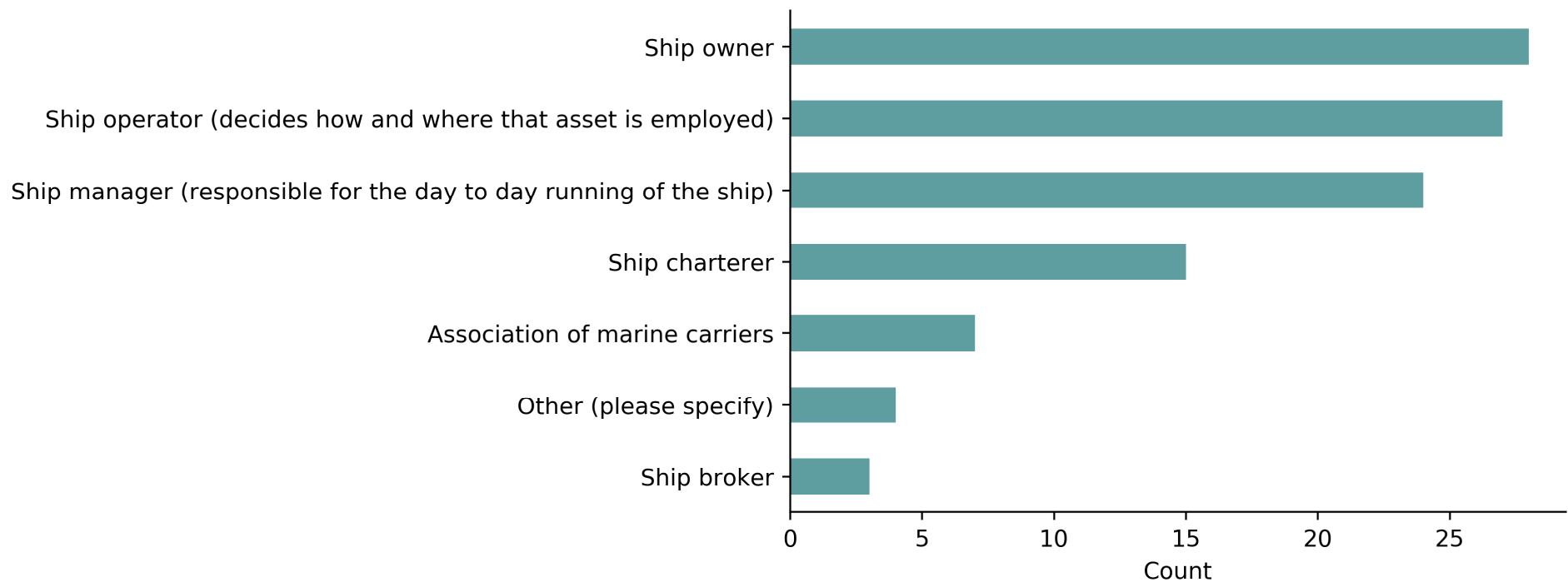


- Goal to validate and refine approach
- International project team + ERG/EERA
- Pending positive outcome, Phase II
 - Business case
 - Financial model
 - Operational model

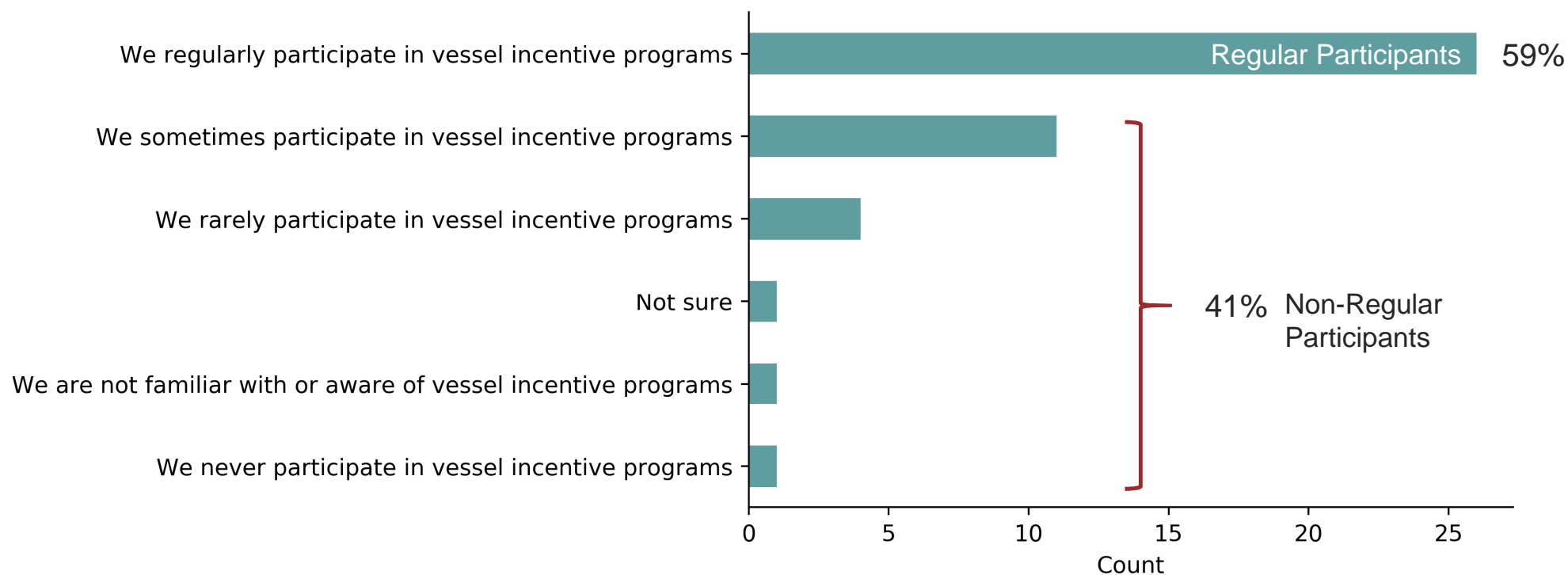
Marine carriers and related associations



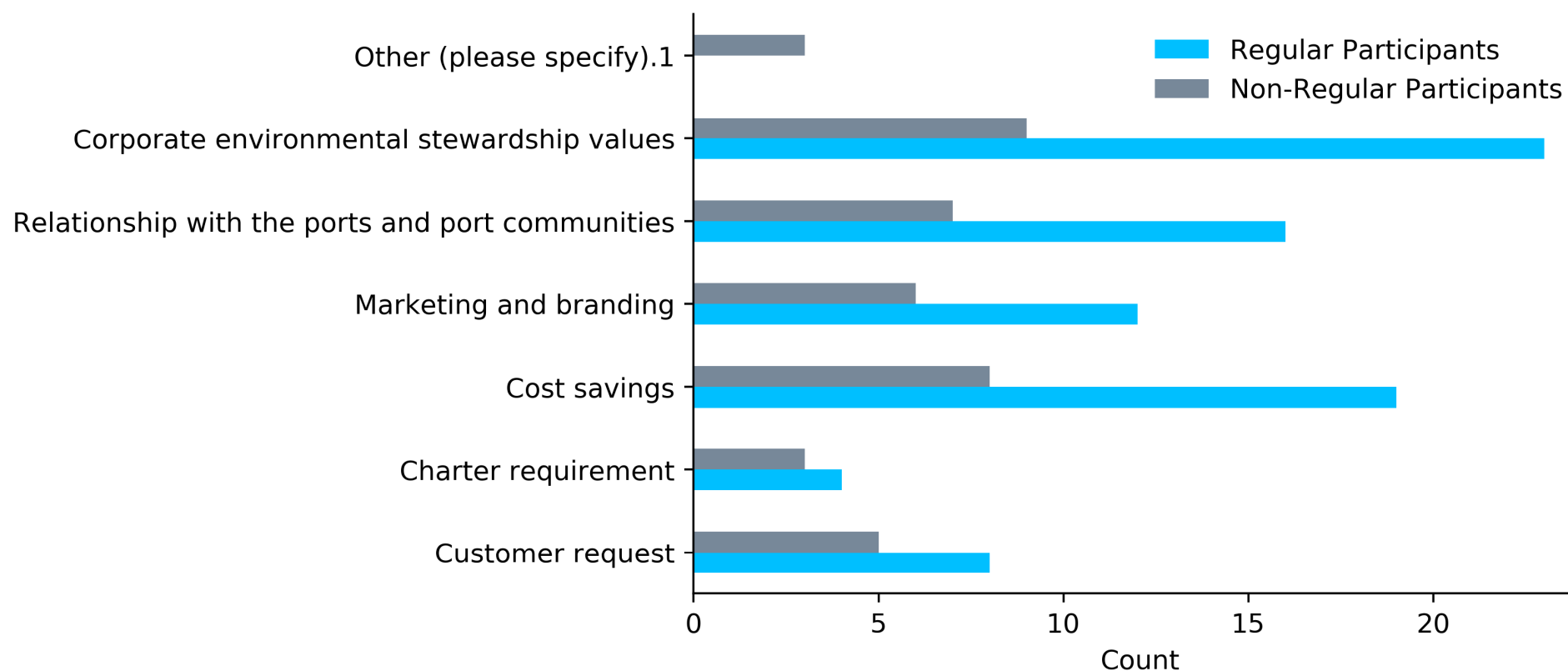
Marine Carriers-Role



Marine Carriers-Participation



Marine Carriers-Reason for Participating in Incentive Programs



Marine Carriers-Port/Vessel Decisions

Do _____ factor into port routing decisions?

	Always	Sometimes	Rarely	Never	Not Sure
Vessel incentive programs		8	11	19	
Environmental Infrastructure	3	13	9	15	

Do _____ factor into vessel routing decisions?

	Always	Sometimes	Rarely	Never	Not Sure
Vessel incentive programs	1	6	10	20	
Environmental Infrastructure	3	14	7	15	

Marine Carriers-Factors Increasing Incentive Program Participation

	Mean	Median	Mode
Corporate Values	3.364	4.0	4.0
Easier Application	3.250	4.0	4.0
Better Information	3.182	4.0	4.0
More ports	3.091	4.0	4.0
Track Cumulative Benefits	3.000	3.0	4.0
Greater Stability	3.000	3.0	4.0
Similar Incentive Eligibility Criteria	2.932	3.0	3.0
Larger incentives	2.886	3.5	4.0

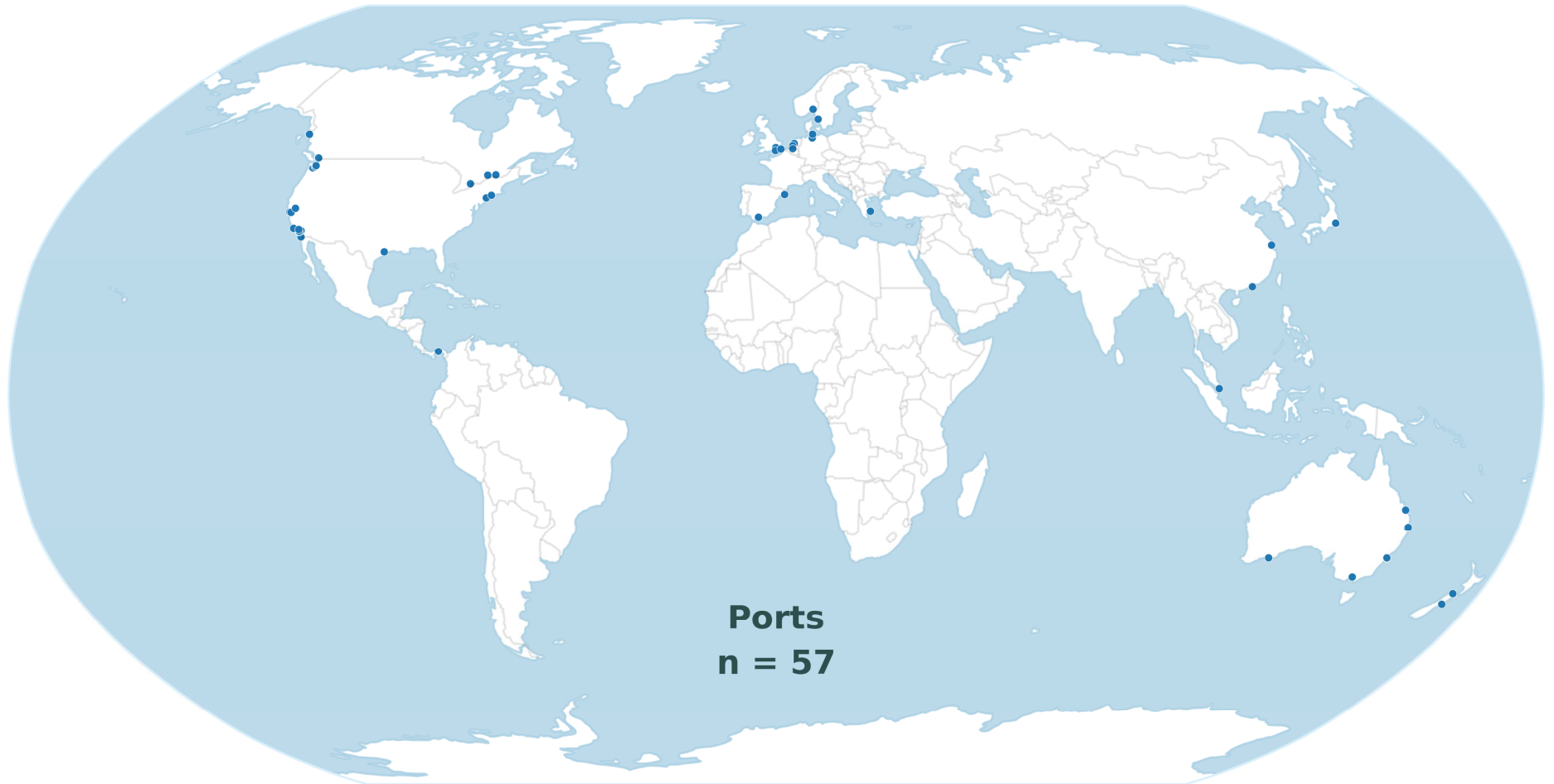
Marine Carriers-Factors Increasing Use of Environmental Infrastructure

	Mean	Median	Mode
More Financial Incentives	3.409	4.0	4.0
Corporate Values	3.273	4.0	4.0
Ease of Access	3.136	3.0	4.0
Environmental Benefits	3.091	3.0	4.0
More ports offer infrastructure	3.023	3.0	4.0
Confidence in infrastructure	3.023	3.0	4.0
Media Recognition	2.591	3.0	3.0

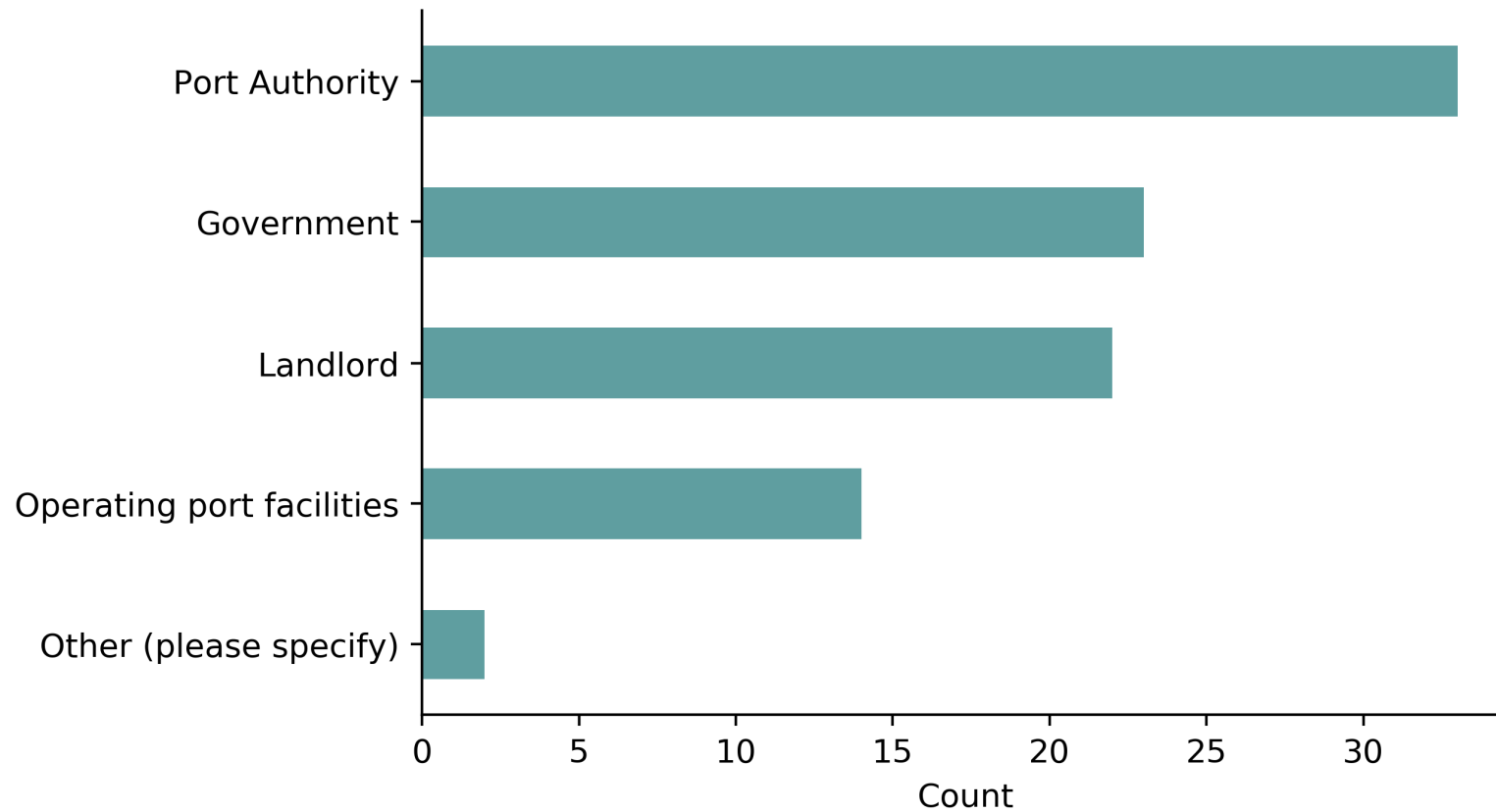
Marine Carriers-Additional comments/themes

- More transparency/access to information including for crews
- Inclusion of others in the supply chain e.g. charters, cargo owners
- Early step could be spreadsheet or database of programs
- Making costs more comparable e.g. using shore power vs. not

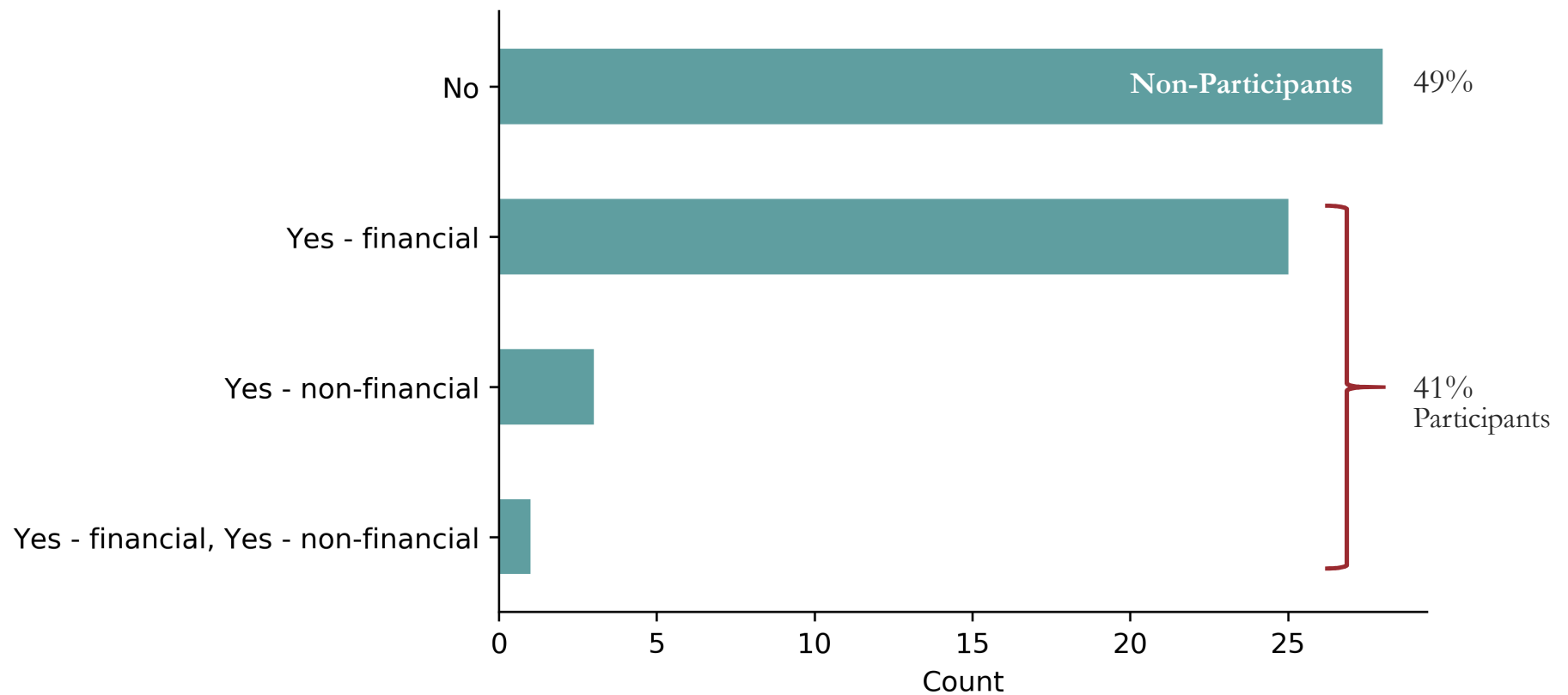
Ports and related governments/associations



Ports-Role



Ports-Incentive Participation



Ports-Factors for Maintaining and Increasing Incentive Program Participation

	Mean	Median	Mode
More green vessels at your port	3.588	4.0	4.0
More green vessels in global fleet	3.353	4.0	4.0
Increased participation in incentive program	3.283	3.0	4.0
Reduced time and admin costs	3.160	3.0	4.0
Improved customer experience	3.065	3.0	3.0
Improved Communication	3.022	3.0	3.0
More ports offering incentives	2.900	3.0	4.0
Better understanding of other incentive programs	2.800	3.0	3.0

Very important (4), Moderately important (3), Slightly important (2), Not important (1), Not sure (0)

Ports-Factors for Maintaining and Increasing Use of Env. Infrastructure

	Mean	Median	Mode
Increase in vessels using your env. infrastructure	3.455	4.0	4.0
Increase in vessels using env. infrastructure globally	3.347	4.0	4.0
Increase in the number of ports offering env. infrastructure	3.340	4.0	4.0
Better understanding of env. infrastructure offered	3.104	3.0	4.0
Improved building of reputation and confidence	2.977	3.0	4.0
Improved communication of env. infrastructure	2.929	3.0	3.0

Very important (4), Moderately important (3), Slightly important (2), Not important (1), Not sure (0)

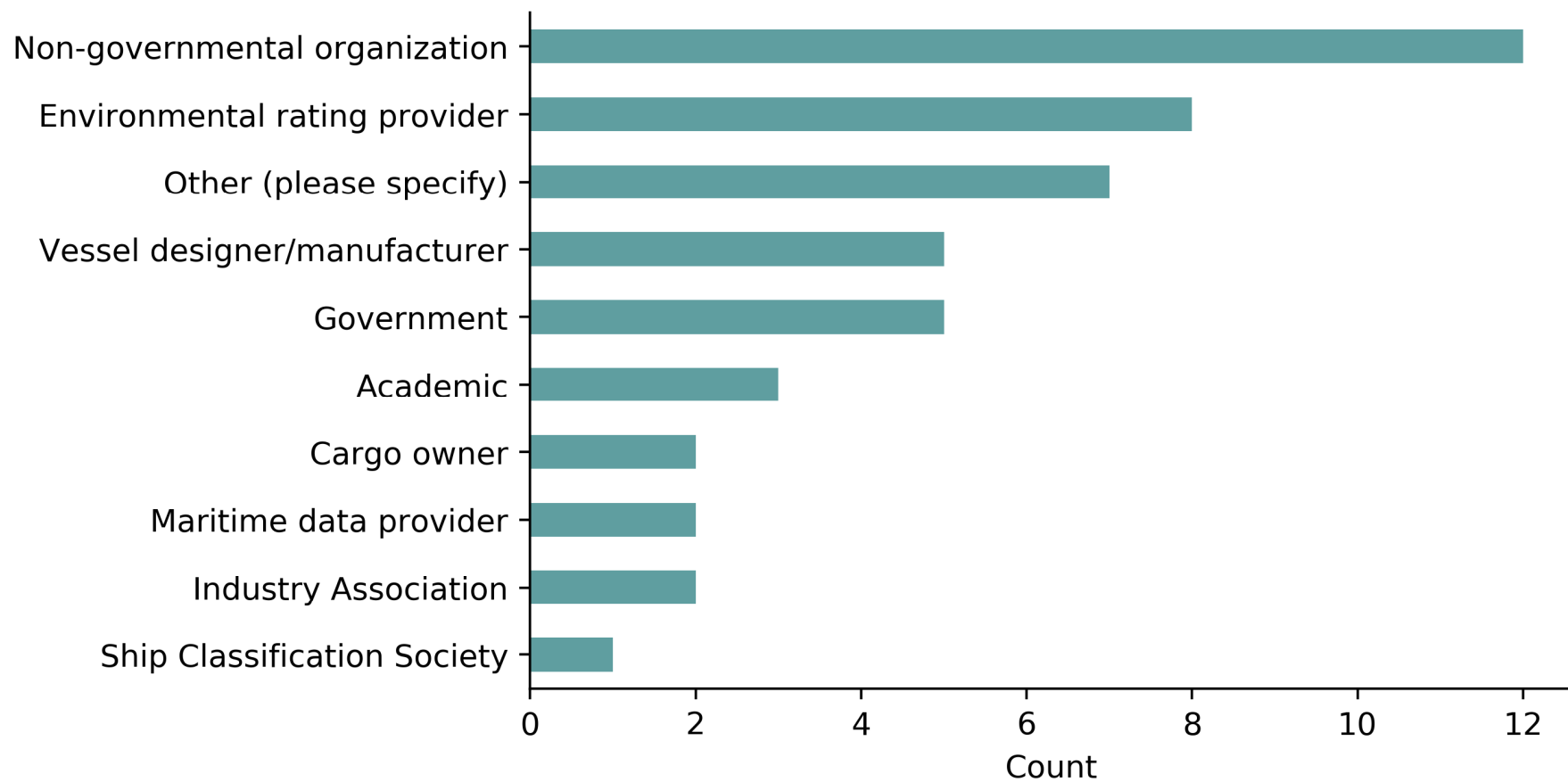
Ports-Additional comments/themes

- Identification of emission reductions associated with incentives, do the incentives effect change
- \$/tonne reduced for incentives vs. other reduction options
- Port competitiveness issues/attraction of cleaner vessels to a port
- Issues around internal resources to administer incentives and finances (for incentives themselves if cost to port)
- For infrastructure, consistency among ports in a geographical area and/or along a trade route
- Things working ok as they are/Proposal will improve things
- How to operate and maintain website

Other Stakeholders



Other-Role



Other-Incentive Awareness

47% Actively engaged in incentive programs and topics

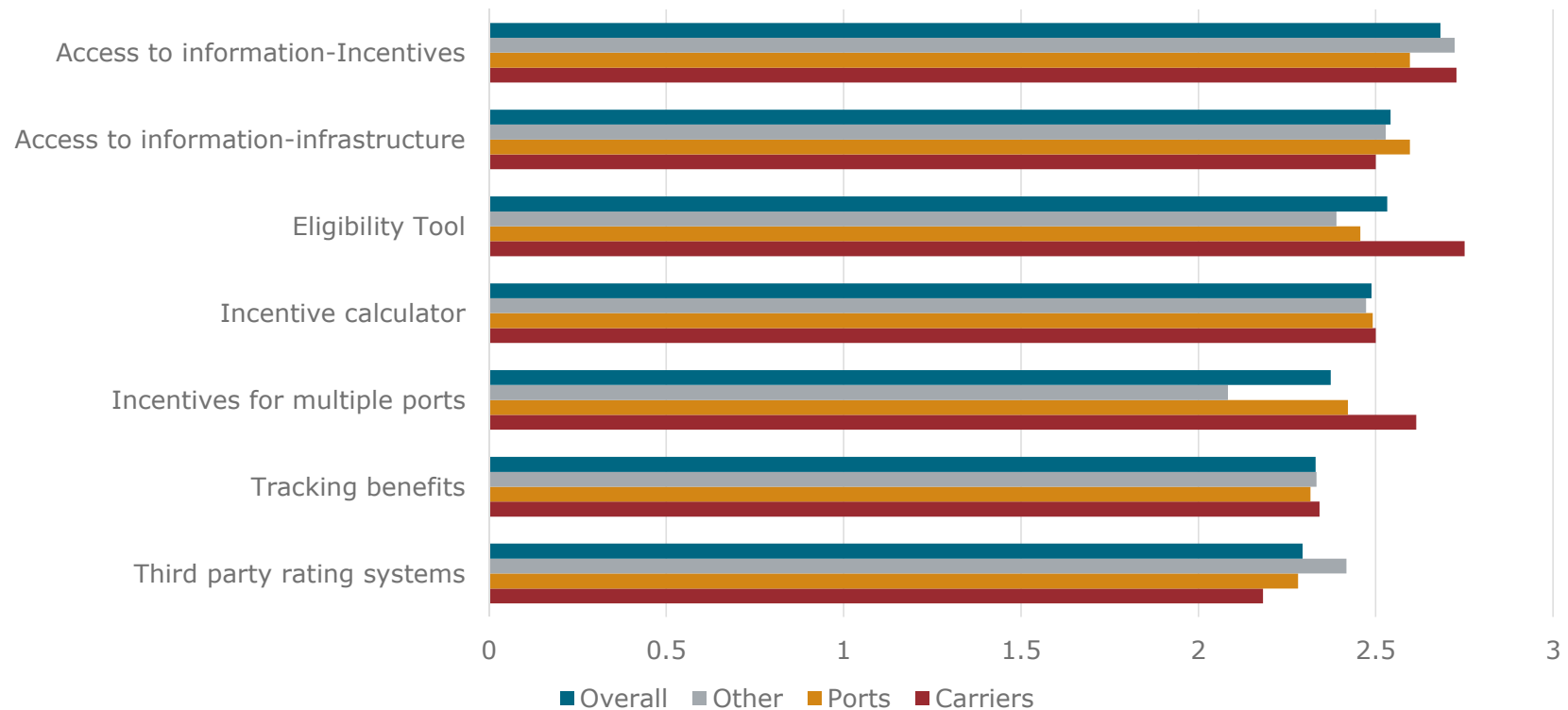
28% Generally familiar with incentive programs and topics

22% Aware of incentive programs and topics

Other-Additional comment themes

- Potential inclusion of non-port incentives
- Cost-benefit analysis
- Best practice identification
- Website should be multi-lingual
- Training on web tool, meetings with committee, promotion at events, list serve for sending out major updates
- Helps suppliers develop business case for customers on environmental improvements to vessels

All Stakeholders-Usefulness by Function



Next Steps

- Focus group user story webinars (**June 13 and 17**)
 - Incorporate feedback
- User story feedback due (**June 21**)
- Develop proposal for ICSEER based on survey results and user stories
- Share proposal with Project Team (**mid-July**)
 - Incorporate feedback
- Share proposal with broader stakeholder group (**end-July**)
 - Incorporate feedback
- Final report (**end-August**)



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Thank you

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