
2024
ANALYSIS
REPORT



IMPACT **MEASUREMENT**



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SURFRIDER AND GREEN MARINE EUROPE

For the past 5 years, Surfrider Foundation Europe (SFE) has been incubating the Green Marine Europe (GME) environmental certification program, with the support of Green Marine on the other side of the Atlantic. This close collaboration to transpose to Europe an 11-indicator standard covering key issues (air, water and soil quality, biodiversity and climate) stems from SFE's desire to create optimal conditions for proactively accompanying the European maritime industry on the road to sustainability, going beyond current regulations.

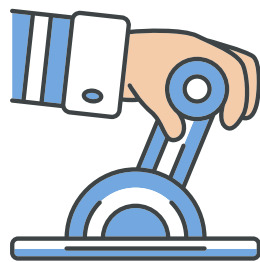
In just 5 years, Green Marine Europe has opened its certification to shipowners and then to shipyards. It now has 66 members in 10 European countries (Belgium, the UK, France, Germany, Luxembourg, Monaco, the Netherlands, Portugal, Spain and Sweden), including 31 participants, 26 supporters and associations and 9 partners.

These 5 years constitute a cycle that needs to be evaluated.



ASSESSMENT CHALLENGES

This study is based on the methodology now tried and tested by Surfrider Foundation Europe - that of the impact measurement agency Improve. It addresses 3 main issues.



01. Steering

Steering certification: ensuring that GME has genuine buy-in from its participants.

02. Communication

External stakeholders (customers, suppliers, investors) and internal stakeholders (employee commitment).

03. Innovation

Continuous improvement and innovation, thanks to the identification of improvement levers for the relevant development of performance indicators.



SCOPE OF THE STUDY

25 shipowners

3 shipyards

28 companies



The impact study focused on the 28 companies certified GME in 2024 for the 2023 year.

They include 25 shipowners and 3 shipyards. This group reflects the diversity of the companies integrated within GME's scope: passenger ships (ferries, hovercrafts, high-speed vessels (HSC) and cruise ships), tankers, bulk carriers, container ships, tugs, offshore vessels, ro-ro ships, service vessels (for laying submarine cables, scientific research, etc.).

The selected year of certification chosen is the first for some companies - such as shipyards - but the fifth for a number of shipowners, who are pioneers in their GME commitment. The aim was to assess the extent to which the standards had been adopted and integrated.

In all, 22 companies responded to the survey.

This study consisted of 3 questionnaires, for 3 different target audiences:

- The Technical/QHSE/CSR/Fleet Departments, which are at the forefront of the deployment and monitoring of the standards internally. A total of 22 responses were received, with a participation rate of over 71%.
- General management, the main decision-makers regarding GME participation. A total of 20 responses, with a participation rate of over 67.5%.
- Sales, marketing and communications departments, which promote GME to their external stakeholders (suppliers, customers, passengers). A total of 12 responses, with a participation rate of over 35.5%.

The wide range of jobs and job titles corresponds to the heterogeneity of the certified companies - from large international groups to small family businesses, from the world's 3rd largest container carrier to the inter-island passenger and freight transport company with one vessel. It was important to design this study in an inclusive way, taking into account the variety of organisations in the companies concerned, given their size and field of activity.



Note: the low participation rate for the Sales/Marketing/Communications target should be put into perspective in the light of the very wide range of companies certified in this area. See Page 10 on representativeness.



METHODOLOGY

The very limited size of the samples studied, as well as the heterogeneity of the target companies, meant that it was not possible to cross-reference variables for relevant inputs. Although attempts were made to do this, they only added limited value to the analysis. We have therefore opted for direct use of the data collected. This point has an impact on representativeness - see Page 10.

The methodology is based on a structured and progressive approach to gathering information at different levels of analysis, while providing a contextual, operational and strategic understanding of Green Marine Europe's impact.

This methodology combines several levels of analysis (characterisation, performance, impact, prospective) and several types of questions (closed, graduated scale, open) to provide a comprehensive and nuanced view of the effects of Green Marine Europe.

It enables both quantifiable results to be measured and qualitative feedback to be captured, which will provide valuable input for improving the programme.



For the Technical Departments/OSHE/CSR, the questionnaire breaks down as follows:

- 5 characterisation questions
- 3 performance questions
- 5 impact questions
- 3 open and exploratory questions

For General Management:

- 5 characterisation questions
- 4 performance questions
- 5 impact questions
- 6 forward-looking questions

For Sales/Marketing/Communications Departments:

- 5 characterisation questions
- 2 performance questions



ASSESSMENT STAGES

Three target groups, three evaluative questions

Representativeness: requirement for a margin of error of between 5 and 10%

- *Technical/QHSE/CSR Departments: ~9.9 % (acceptable, within the 5-10 % range)*
- *General Management: ~10.6 % (slightly above the upper limit).*
- *Marketing/Sales/Communications Department: ~14.5 % (beyond the target range, less representative, given the small number of companies on the entire panel with a real approach to these issues with dedicated HR, generally due to their sector of maritime activity).*

To what extent does Green Marine Europe's standards framework influence the behaviour of top management of the certified companies and how does that strengthen the autonomy and recognition of dedicated teams in their operational decisions?

In what way does GME provide leverage for internal teams, particularly in terms of resources, visibility and attention given to their initiatives on environmental issues?

Does GME form part of the communications strategy of certified companies in their stakeholder relations, particularly in terms of raising passenger awareness of the issues at stake.



OUR HYPOTHESES

MAIN HYPOTHESES

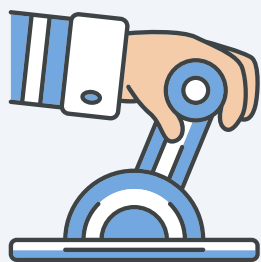
GME helps you to manage your company's environmental transition.

SECONDARY HYPOTHESES

- SH1 GME helps to roll out the environmental transition plan
- SH2 GME helps steer the company's environmental strategy
- SH3 GME is a tool for evaluating and measuring the progress of the company's environmental strategy
- SH4 GME contributes to increasing the skills of managers and teams in charge of the environmental transition
- SH5 GME strengthens employee commitment
- SH6 GME strengthens the employer brand image
- SH7 GME strengthens positioning as a sustainable player in its ecosystem of external stakeholders
- SH8 GME facilitates the financing of the company's environmental transition.



GME, A **TOOL** FOR STEERING THE ENVIRONMENTAL TRANSITION



For Technical/QHSE/CSR/Fleet Managers

More than 86% of respondents in the Technical/QHSE/CSR/Fleet Departments consider GME to be a lever for improving the management of their environmental transition plan.

Over 72% of them see GME as a steering tool in the deployment of the environmental transition strategy. For more than 81%, GME is a tool for evaluating the environmental transition strategy and its progress.

For the General Management

For companies certified for at least 3 years:

- 66%+ indicate being influenced by GME and its performance indicators in making their strategic decisions
- Nearly 90%: GME contributes to better management of the ecological transition strategy

For those certified for less than 3 years :

100%

of respondents see GME as helping them to make future strategic decisions, as contributing to better management of the environmental transition, and as uniting teams around the environmental transition strategy.



Management is in favour of Green Marine Europe certification. They want us to make progress to show both internally and externally that we are taking concrete action to promote the environmental and energy transition. The Marketing and Communications departments are also particularly interested in our progress towards Green Marine Europe certification. They appreciate being able to showcase the company's improvement actions on board our ships or at events."

BRITTANY FERRIES



The framework enables us to cover all the issues and to have a global view of our impact. This helps to raise awareness and influences decision-making."

LA MERIDIONALE

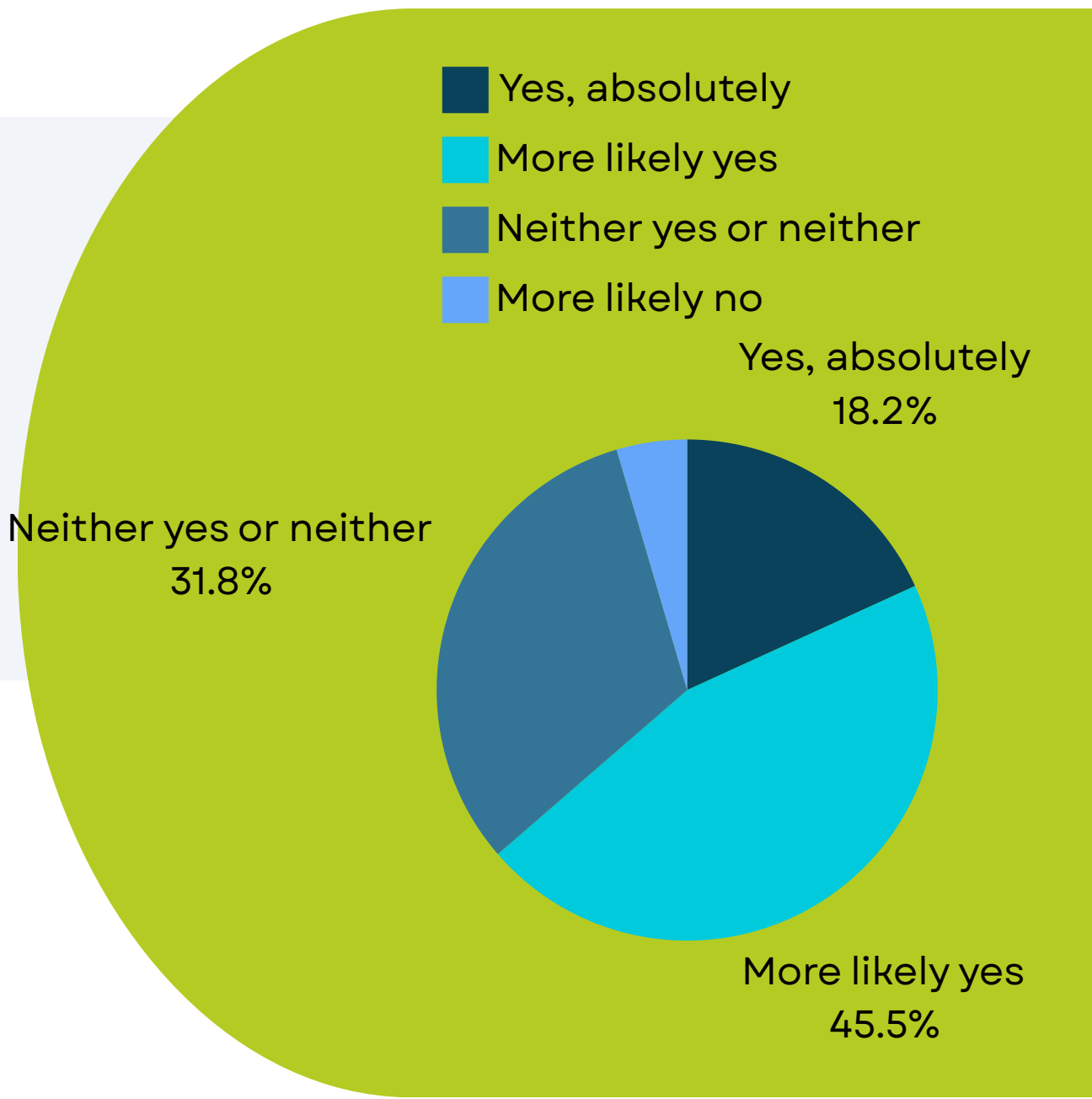


This enabled us to set realistic targets to achieve."

SOCATRA

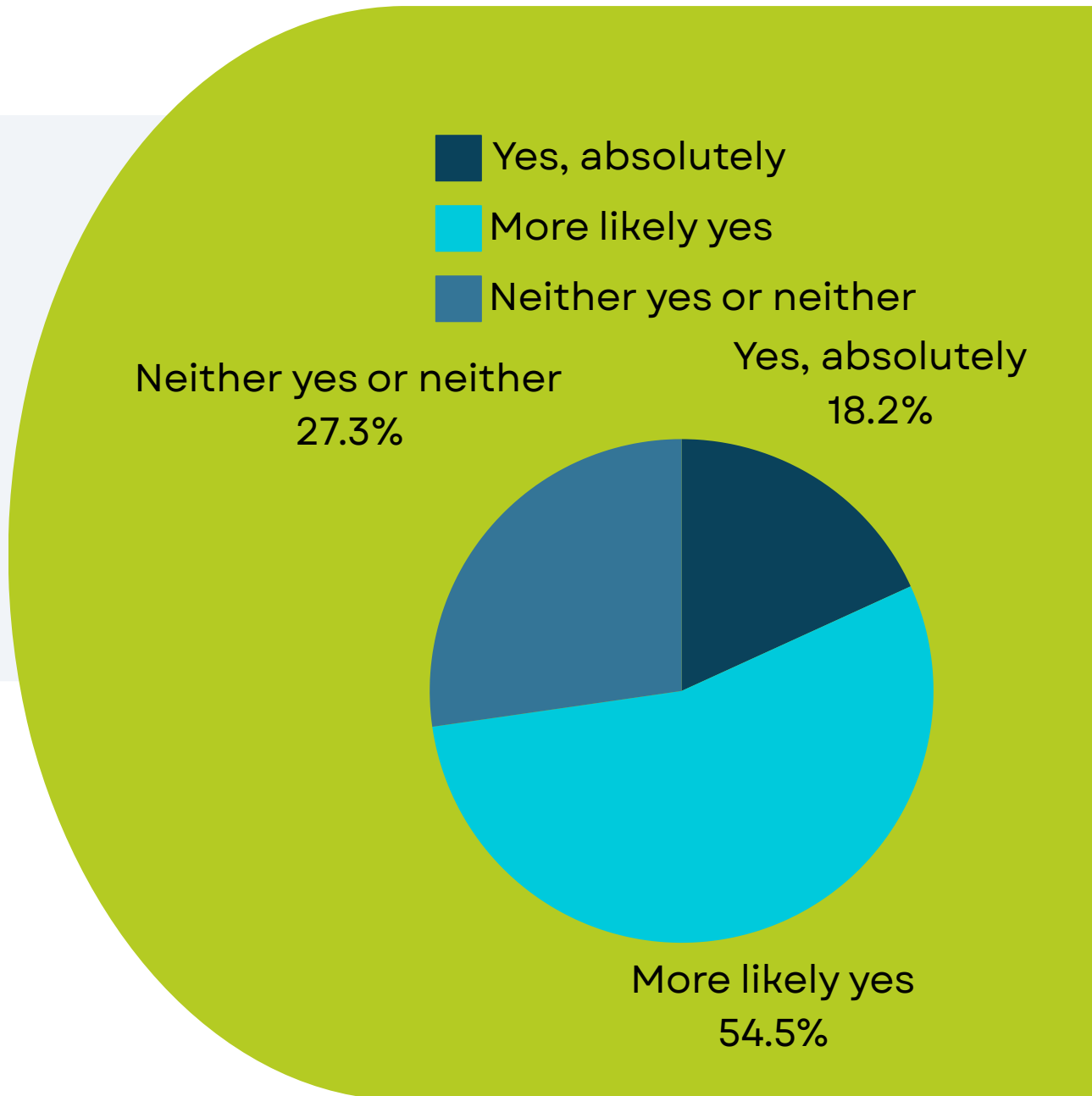
For the Technical/QHSE/CSR/Fleet target groups, the notion of steering the environmental transition plan is reinforced by the usefulness of certification and its standards in increasing the skills of the top management questioned in the study (Graph 1). All 22 respondents to the survey (see Page 7) answered the question on the development of top management skills.

Graph 1



For the Technical/QHSE/CSR/Fleet target, the notion of steering the environmental transition plan is reinforced by the usefulness of certification and its standards in increasing the skills of the teams dedicated to these issues (Graph 2). The 22 respondents to the survey (see Page 7) answered the question about increasing the skills of their teams.

Graph 2



GME, SERVING **EMPLOYEE COMMITMENT** AND THE EMPLOYER BRAND



For the General Management

Among companies certified for less than 3 years

100% of the General Management respondents from companies certified for less than 3 years consider GME to be an aid to team cohesion when it comes to their environmental transition strategy

80% see GME as helping them to better position themselves as players in the environmental transition

For the General Management


Among companies certified for for at least 3 years

For more than 77% of respondents, GME is a way of uniting teams around an environmental transition strategy and better positioning the company as a player in the environmental transition in the eyes of external stakeholders.

For Technical/QHSE/CSR/Fleet Managers

More than 80% of respondents consider that GME is a source of internal recognition for them.

Over 72% see GME as a source of external recognition. And over 68% see GME as a vehicle for team cohesion.

 *GME fits in perfectly with our approach to reducing our impact, and not just in terms of carbon. Our Bourbon Offshore Surf subsidiary is acting as a “pilot” subsidiary, with the aim of seeing other international ship managers get involved at a later stage.” BOURBON*


 *As the GME project manager, I and the employees involved, were put in charge of the internal communications regarding the GME certification, as well as for our annual sustainability report.” MARITIMA*


GME, AN ELEMENT OF EXTERNAL COMMUNICATIONS



More than 90% of respondents from Marketing and Communications departments include GME in their communications strategy

Nearly 92% of respondents are of the view that GME will play an increasing role in their communication strategy

 *Environmental issues are regularly raised on our various communication channels. This encourages us to promote our actions and develop new ones".*
ARANUI

 *GME is in line with the environmental communication that will be intensifying over the coming months".*
CORSICA LINEA

CONCLUSION AND PERSPECTIVES

Our main hypotheses and the secondary hypotheses (SH1 to SH7) are validated by the study. Whether certified for less or more than 3 years, the maritime companies surveyed attest to the genuine usefulness of certification and the GME framework in terms of environmental transition, in terms of both its strategic design and in its practical implementation and evaluation.

GME's relevance in response to the environmental problems of the target groups is reflected both among the General Management and in the Technical/QHSE/CSR/Fleet departments.

This relevance leads to increased employee commitment, which is fueled by the positive influence of the standards.

Similarly, GME is becoming an increasingly important part of the communications strategy of the respondent companies.

Finally, GME is strengthening and regarded as being able to strengthen the positioning of certified companies as players in the environmental transition within their sphere of activities (stakeholder community).

There are two areas for improvement. The first lies in GME's role as a facilitator of financing for environmental transition (SH8), since 70% of General Management respondents stated that they did not establish this link between certification and obtaining financing.

The second lies in raising awareness among passengers (ferry and cruise companies) of the environmental efforts of the said companies, as well as the issues involved in preserving marine ecosystems.