Survey on the provision of internet access to seafarers for personal use on board ships

RESULTS

ICS and ECSA conducted the survey from December 2018 to January 2019, with the active assistance of the Asian Shipowners' Association (ASA).

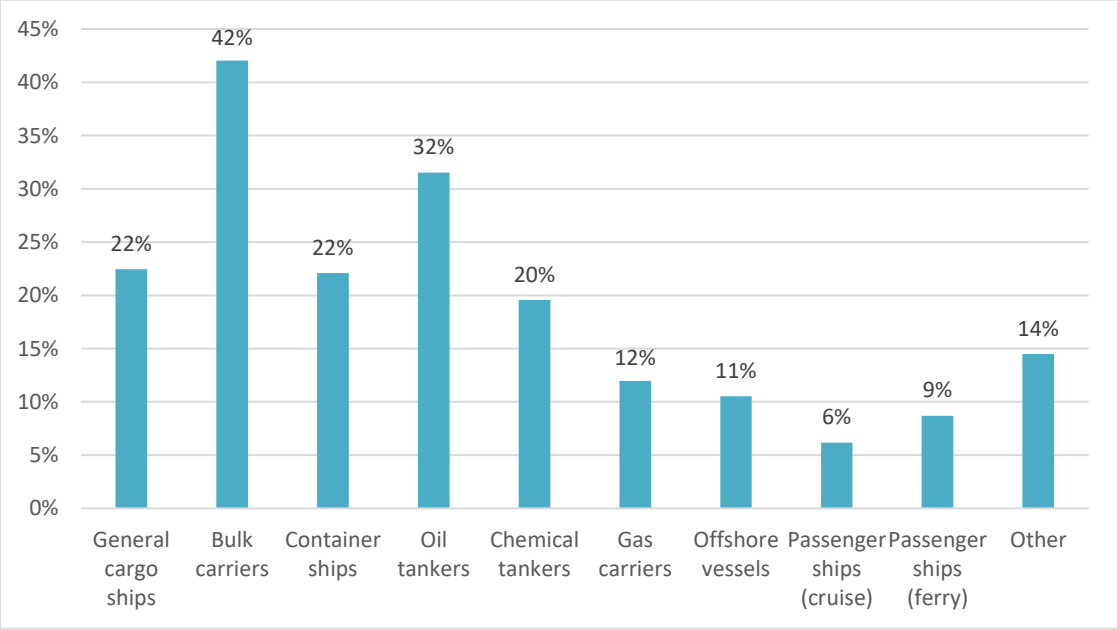
The aim of the survey was to collect information from shipping companies on the provision of internet access to seafarers for personal use on board ships. The intention was to use the survey results and analysis to inform any future work or positions of ICS and ECSA.

Number of respondents: 276 companies (linked to ICS, ECSA & ASA)

1. How many ships does the company operate?

Number of ships: 11,665 ships
Size of company fleets: Range from 1 ship to 750 ships.
Average size of company fleet: 42 ships

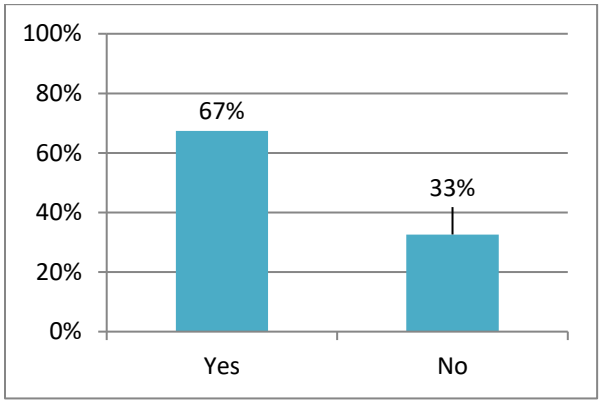
2. What type(s) of ships does the company operate?



Other types of ships included: Dredgers, service operation vessels (SOVs), pilot boats, harbour tugs, mobile offshore drilling units (MODUs), drill ships, cement carriers, ro-ro ships, pure care and truck carriers (PCTCs), heavy-life vessels, cable-lay vessels, yachts, bunker barges, accommodation vessels.

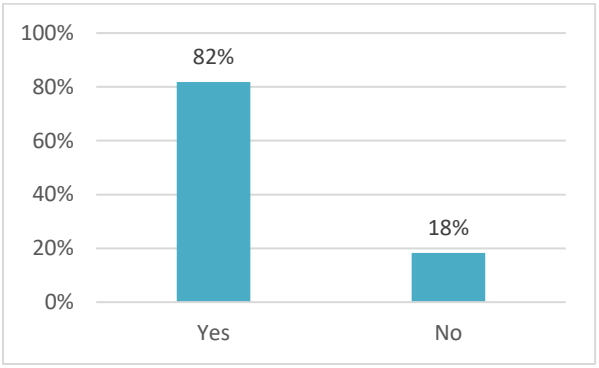
Analysis: The responses indicate a profile of respondents that closely reflects the profile of the world fleet, taking also into account the diversity of other types of ships specified under "Other". It can therefore be concluded that the survey was completed by a representative sample of companies. It is also considered a fairly large sample given that 11,665 ships equates to around 14% of the world fleet.

3. Do any of the ships operated by the company fly the flag of an EU Member State?



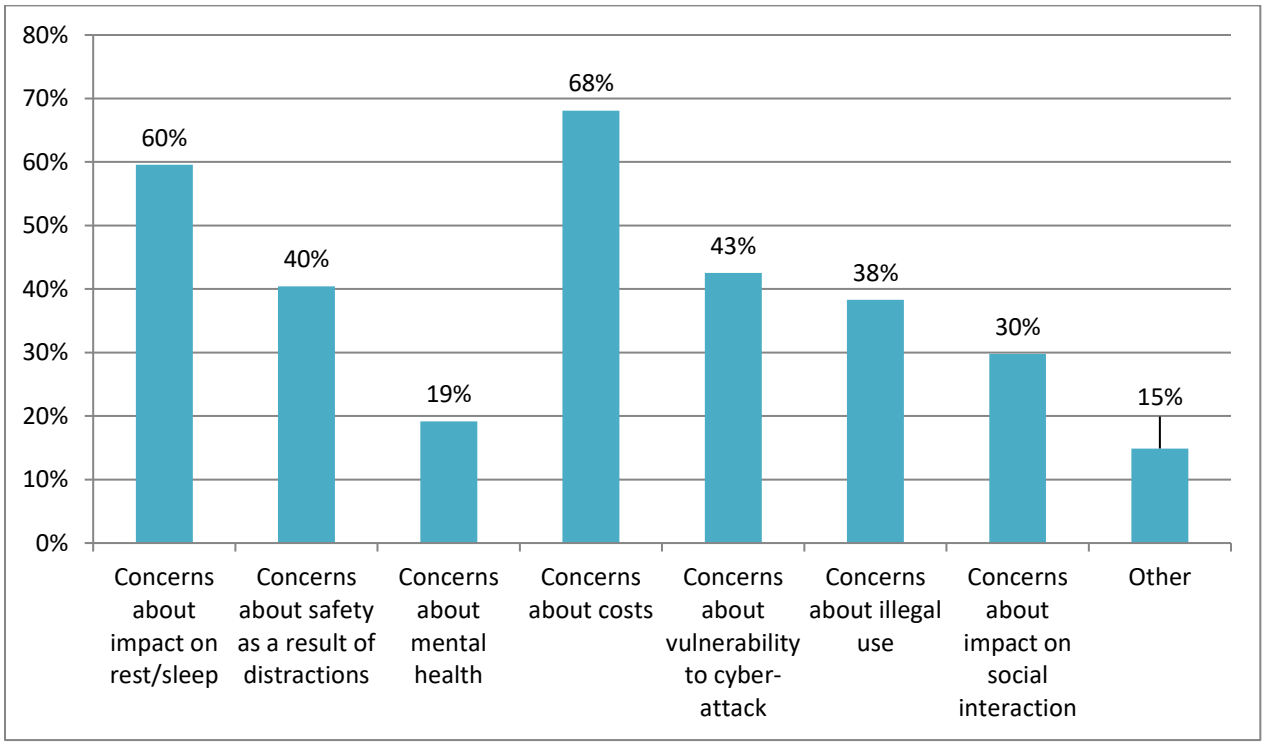
Note: This question would be answered "Yes" even if only one ship operated by the company was flagged to an EU Member State.

4. Does the company provide internet access to seafarers for their personal use on board ships?



Analysis: The responses indicate that 82% of companies provide internet access to seafarers for personal use on board ships. This suggests that provision of internet access to seafarers for personal use on board ships has become more widespread and available to seafarers than previously imagined.

5. What are some of the company's reasons for not providing internet access to seafarers for personal use on board ships?



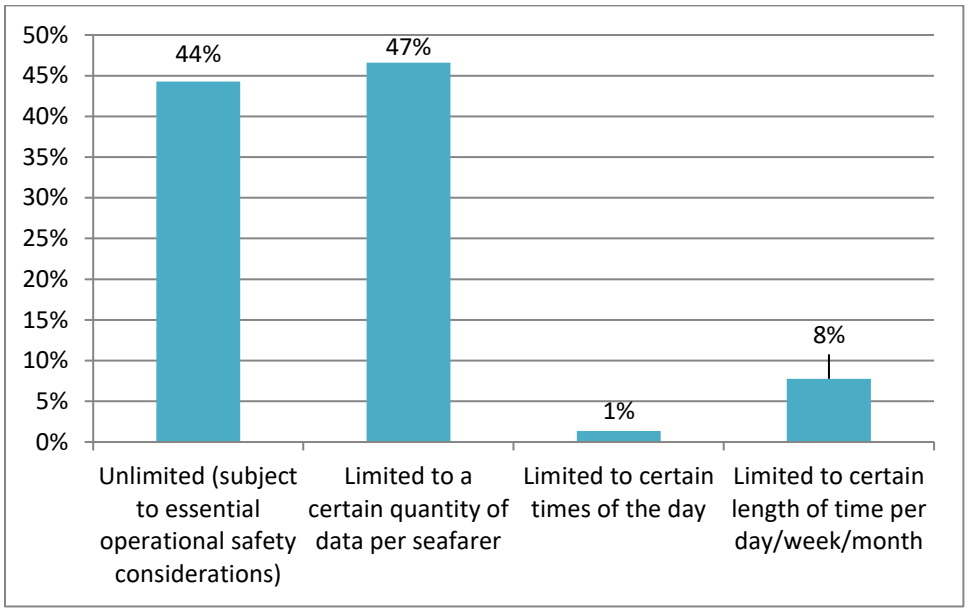
Other concerns included:

- The feasibility of providing internet due to the current IT infrastructure of the ships;
- The strength of the Wi-Fi signal as this was not envisioned when the ships were built;
- Internet access made crew restless due to the time difference with whom they were often communicating; and
- Wi-Fi signal would end up being available in areas on board ships where accessing the internet could be a distraction and affect productivity or performance.

Note: Only respondents that indicated that they did not provide internet access to seafarers for personal use on board ships were asked this question.

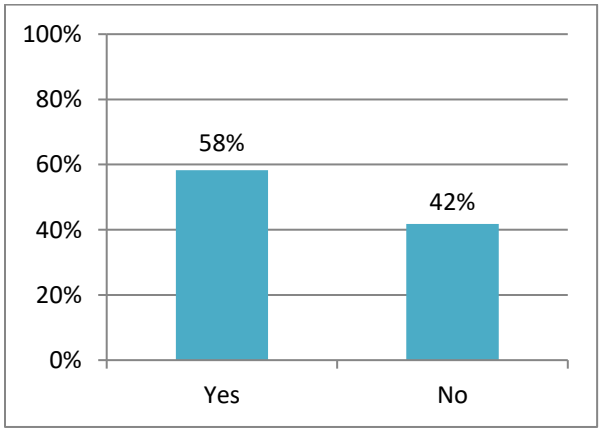
Analysis: The responses indicate that the two primary reasons for not providing are concerns about the costs involved (68%) and concerns about the potential impact on rest/sleep (60%). Other concerns offered as options in the survey appear to be distinctly secondary (i.e. concerns about safety, cyber-security, illegal use and social interaction), with concerns about the impact on mental health a tertiary concern of some companies.

6. What is the parameter on internet access by seafarers for personal use on board ships?



Analysis: The responses indicate that the primary parameter of control of internet access by seafarers for personal use is related to data allowance: "unlimited" (up to availability) or "limited" (seafarers have a personal data allowance). Control related to a time allowance appears to be quite rare. Seafarers appear to have access to "unlimited" data almost as often as "limited" data, which could suggest provision costs are decreasing.

7. Is internet access for personal use provided free of charge to seafarers?



Analysis: The responses indicate that some companies provide internet access to seafarers for personal use free of charge whilst others charge seafarers for the internet access, with a slight majority providing it free of charge (58%).

8. What is the charge to seafarers for the internet access?

Note: Only respondents that indicated that they did provide internet access to seafarers for personal use on board ships were asked this question.

Most of those respondents indicated that seafarers are charged for a data allowance.

Average charge (USD/MB): $0.23 / MB
Median & Mode charge: $0.20 / MB
Lowest charge: $0.02 / MB
Highest charge: $1.40 / MB

Examples of some of the most common data allowance packages:

$40 for 500 MB
$25 for 100 MB
$30 for 100 MB
$10 for 50 MB

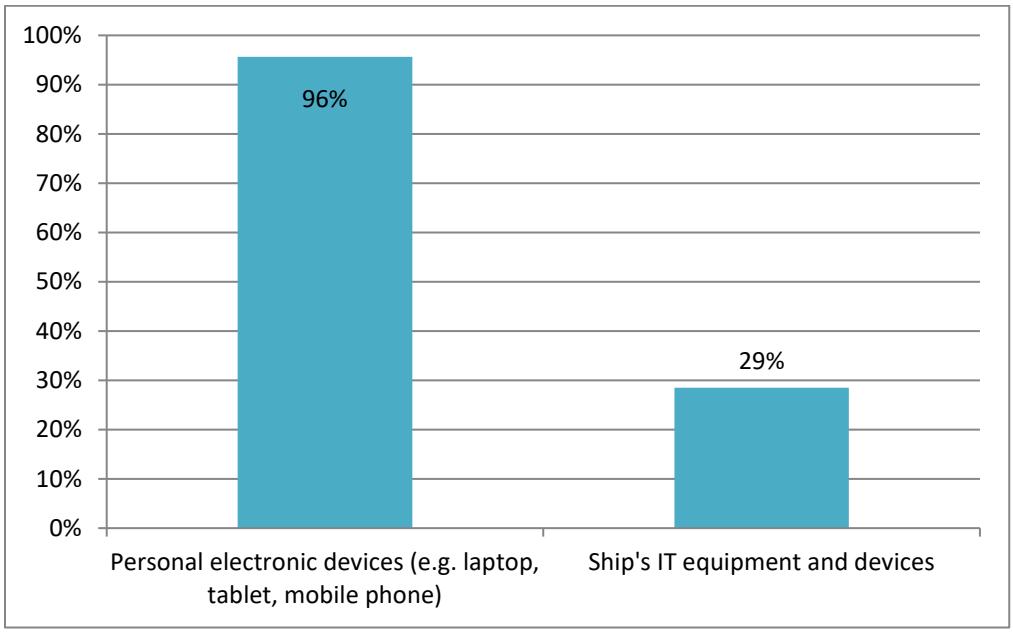
Only 11 companies indicated that seafarers are charged based on a time allowance. Some examples of time allowance packages:

$50 / month *unlimited up to availability
$40 / month *unlimited up to availability
$6 / day *unlimited up to availability

Analysis: The responses indicate that there are several metrics for charging seafarers to access the internet for personal use on board ships. These can be categorized as being based on a data allowance (MB) or a time allowance (minute, week or month). Given that 100 MB of data can provide roughly 4 to 5 hours of web browsing or on social media, or the sending/receiving of over 3000 WhatsApp or email messages, it might be determined that these are appropriate amounts of data allowance being made available given the circumstances of it being provided on board ships. At an average cost of $0.23/MB or equivalent packages of $25 per 100 MB, it appears that the charges to seafarers are fairly consistent, which might confirm that they are a direct function of the costs of providing the internet connection on board ships. To assess whether these costs are “reasonable”, it might be considered appropriate to compare them to mobile data packages or roaming charges ashore. However, comparing costs is not feasible and appropriate as it does not take into account the connection speeds, the reliability, the premium paid by the company to make it available, the wide variations in the costs of internet connectivity around the world, or the relevance of the cost of living in the country of normal residence of the seafarer (which is what might define an individual seafarer’s idea of “reasonable”). It has been reported that the average cost of internet for passengers on cruise ships is an average $0.75/minute or sometimes packages for social media websites for around $5.00/day. Hence internet access for seafarers is generally considerably cheaper than for cruise ship passengers, suggesting again it may be a direct function of the cost of

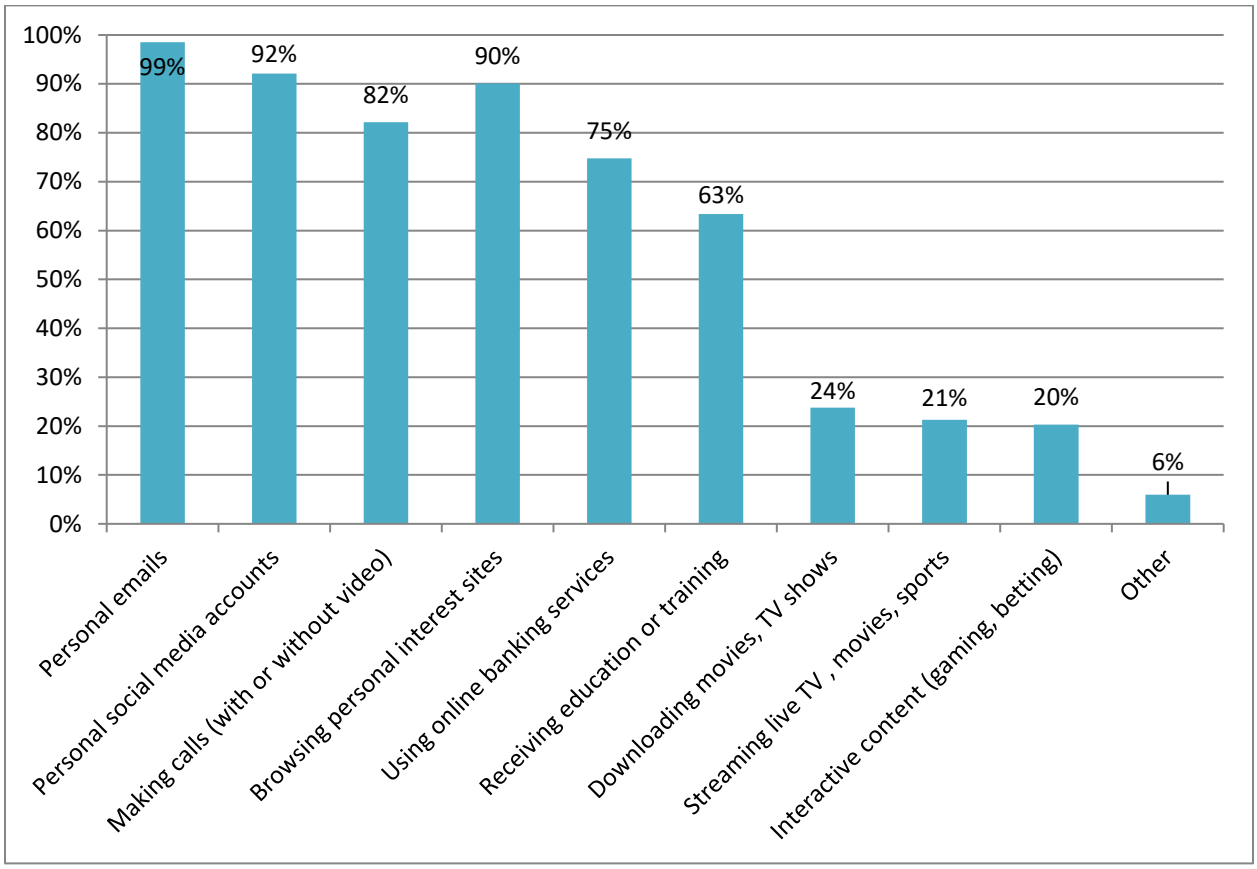
provision. Since the business models of shipping companies are unlikely to include seeking to profit from providing internet access to their seafarers (instead more likely to be linked to recruitment and retention efforts), it should be assumed that the costs will normally be a function of the cost of provision, meaning that the costs could potentially always be considered inherently "reasonable". Therefore, the responses indicate that, where there is a charge to seafarers for internet access for personal use, the costs appear to be "reasonable" (in line with Guideline B3.1.11 of the MLC, 2006).

9. What devices on board ship are seafarers permitted to use to access the internet for personal use?



Analysis: The responses indicate that the provision of internet access to seafarers for personal use is generally intended to be used on seafarers' personal electronic devices. A considerable number of respondents indicated both personal electronic devices and ship's IT and equipment, but this may be due to the fact internet is used on board for operational reasons etc. and these responses are simply the respondent also reflecting that usage too. Companies might not permit seafarers to browse the internet or send personal emails on their ship's IT equipment and devices.

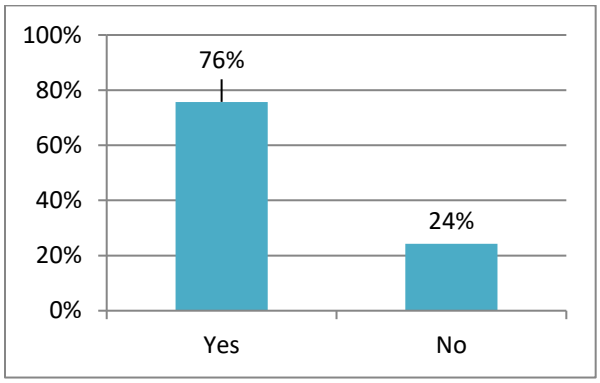
10. For which personal uses are seafarers permitted to use the internet access on board ships?



Other uses included: Web chat services, Skype etc.

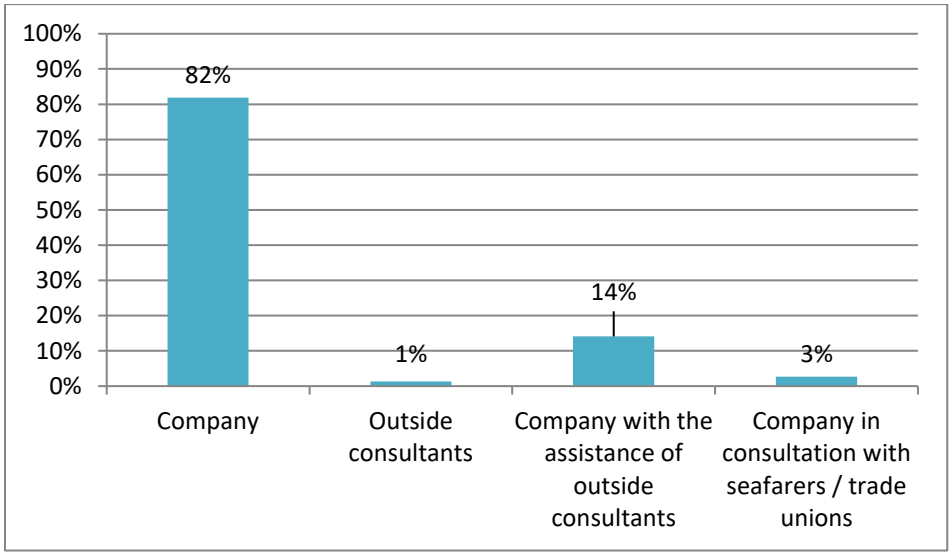
Analysis: The responses indicate that the survey addressed most of the primary uses of internet access by seafarers on board ships. Indications of lesser use of internet on board ships for downloading or streaming content is likely to be a function of the data required to do so, issues of connection speeds, or restrictions on downloading and streaming.

11. Does your company have a written policy concerning internet access by seafarers for personal use on board ships?



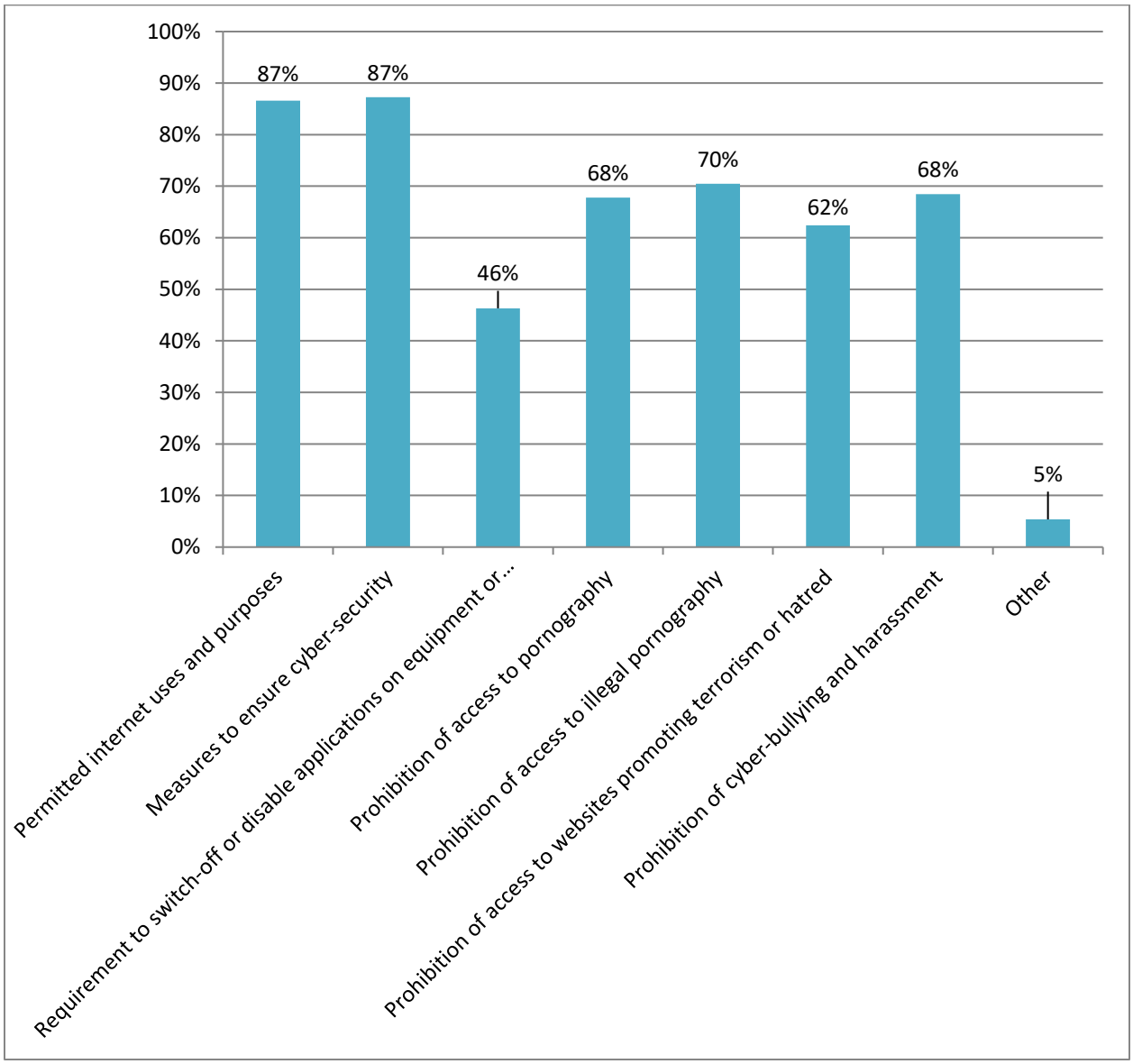
Analysis: The responses indicate that a majority of companies have a written policy related to internet access by seafarers for personal use on board ships. However, it is quite surprising (perhaps alarming from a cyber-security perspective), that nearly a quarter of companies indicated that they have not put any written policy in place. Such policies are common to most workplaces where internet is made available (if only for work-related purposes).

12. Who developed the written policy concerning internet access by seafarers for personal use on board ships?



Analysis: Where there is a written policy related to internet access by seafarers for personal use on board ship, the responses indicate (as might have been expected) that this is normally developed by the company. Companies do not appear to consider that the development of such a policy required consultancy services or that there was any need to consult the representatives of seafarers or seafarers themselves.

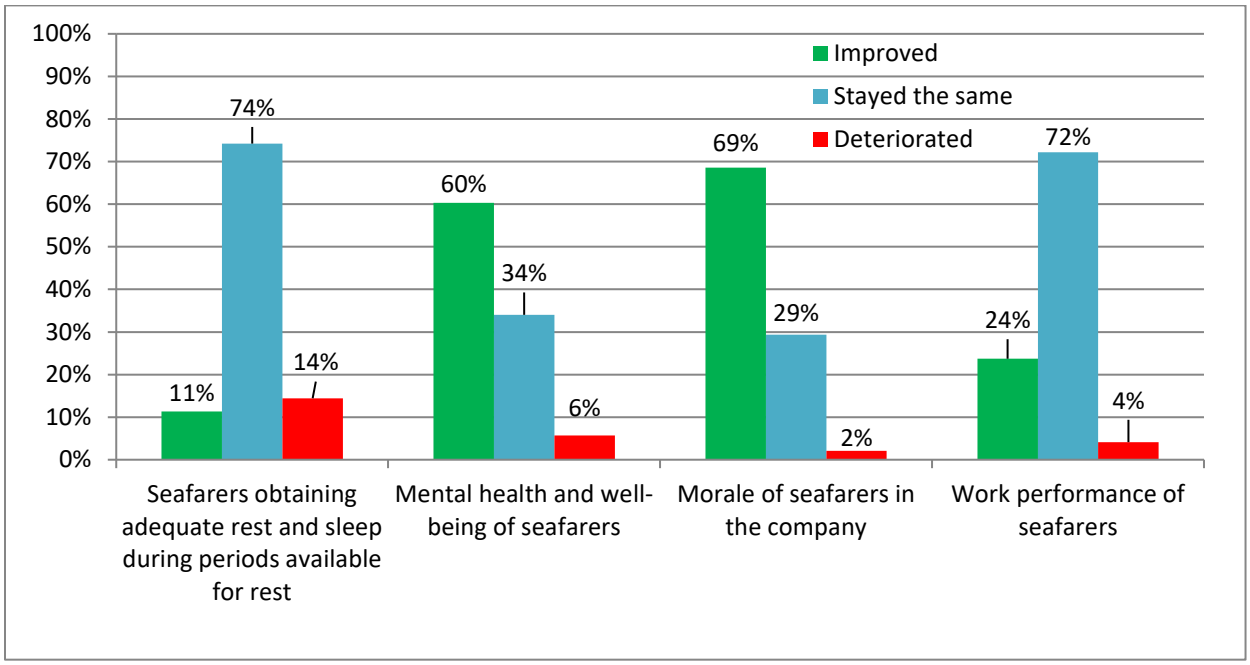
13. What does the written policy concerning internet access by seafarers for personal use on board ships cover?



Other subjects covered: Policies related to use of social media, prohibition of live streaming content.

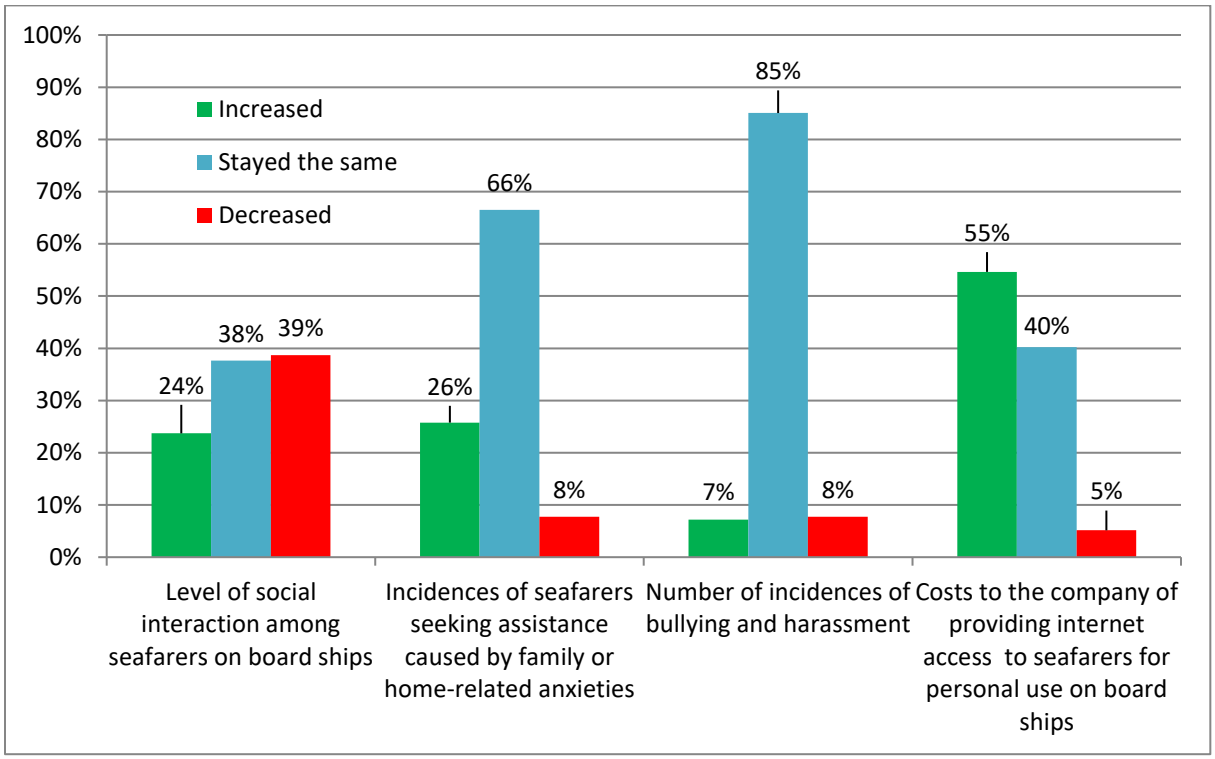
Analysis: The responses indicate that the survey addressed most of the key concerns that one would expect be covered in a written policy for internet access by seafarers for personal use on board ships (possibly due to the general nature of those options provided), and therefore only served to confirm these and some obvious prohibitions.

14. In your opinion, how has the provision of internet access to seafarers for personal use on board ships affected the following?



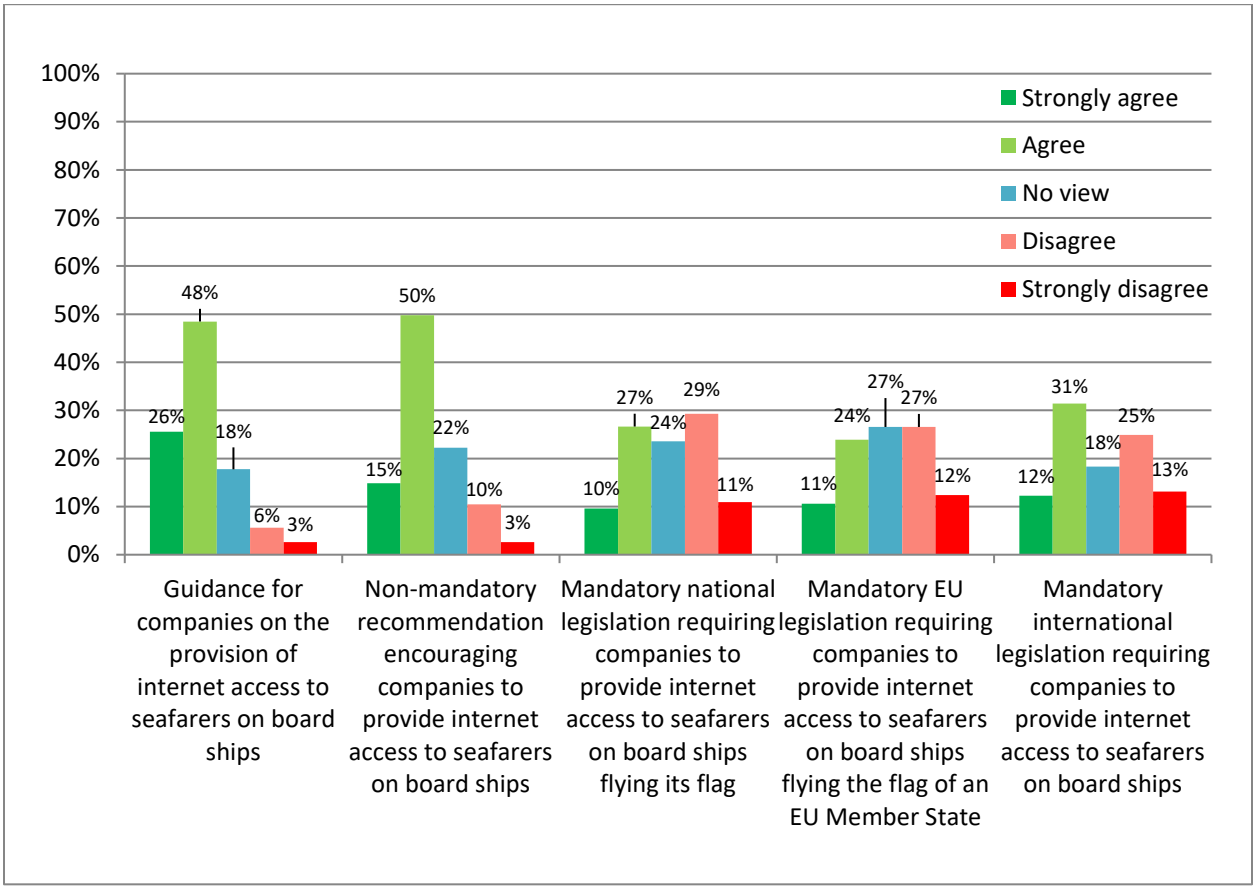
Analysis: The responses indicate that the provision of internet access to seafarers for personal use on board ships has not affected some matters where it might have previously been imagined that there would be an impact or consequences. Whilst there have been concerns expressed that internet access may negatively impact upon seafarers obtaining adequate rest and sleep during periods available for rest, 74% of companies reported that this has been unaffected. Similarly, whilst there have been concerns expressed as to whether internet access may negatively or positively impact upon the work performance of seafarers, 72% of companies reported that this has stayed the same (i.e. not deteriorated). The responses indicate that the provision of internet access to seafarers for personal use may have improved the mental health and well-being of seafarers (60%) and the morale of seafarers in the company (69%).

15. In your opinion, how has the provision of internet access to seafarers for personal use on board ships changed the following?



Analysis: The responses indicate that, in general, the provision of internet access to seafarers for personal use on board ships has not affected some of the areas where it might have previously been imagined that there would be an impact or consequences. However, it should be noted that the survey did not ask about the effects upon the recruitment or retention of seafarers, which may be where companies might have perceived an impact. Social interaction among seafarers is reported as "staying the same" as often as it "decreased" on board ships. The majority of companies reported that the number of reported incidences of seafarers seeking assistance due to family or home-related anxieties have stayed the same, despite speculation that increased communications with family/home might generate more anxieties about happenings and life shore. The vast majority of companies responded that the number of reported incidences of bullying and harassment have not increased, despite speculation that internet access might expose seafarers to a greater risk of online bullying or harassment.

16. What would the company's view be if any of the following proposals were being discussed related to the provision of internet access to seafarers for personal use on board ships?



Analysis: The responses indicate that there is no majority support for any form of mandatory requirement to provide internet access to seafarers for personal use on board ships. Regarding mandatory international legislation, only an aggregated 43% "strongly agree" or "agree" that this should be discussed or pursued. Regarding mandatory EU legislation (regional), only an aggregated 35% "strongly agree" or "agree" that this should be discussed or pursued. Regarding mandatory national legislation, only an aggregated 37% "strongly agree" or "agree" that this should be discussed or pursued. The responses indicate an aggregated 65% "strongly agree" or "agree" that a non-mandatory recommendation would be acceptable. (It is noted that this arguably exists already (to some extent) in Guideline B3.1.11 of the MLC, 2006.) With fewer than 10% of respondents indicating that they would "strongly disagree" or "disagree" and an aggregated 74% who indicate they would "strongly agree" or "agree", the responses indicate that companies would be interested in industry guidance related to the provision of internet access to seafarers for personal use on board ships.

Key findings

Based on the responses to the survey, the following information has been gathered:

- Over 80% of companies provide internet access to seafarers for personal use on board their ships, the majority (58%) provide it at no cost for seafarers, while some ask seafarers for reasonable charge.

- Companies do not support any form of mandatory requirement (international, regional or national) to provide internet access to seafarers for personal use on board ships.

- Companies would support the development of industry guidance related to the provision of internet access to seafarers for personal use on board ships.

- Companies that do not make internet provision for their seafarers for personal use on board ships may be primarily concerned about the costs involved and the possible negative impact on the quality or quantity of rest/sleep obtained by seafarers.

- The majority of companies have developed written policies specifically to address internet access by seafarers for personal use on board ships.

- The provision of internet access to seafarers for personal use on board ships has not been shown to negatively impact upon them obtaining adequate rest/sleep.

- The provision of internet access to seafarers for personal use on board ships has not been shown to negatively impact upon work performance but rather has shown a (small) positive impact.

- The provision of internet access to seafarers for personal use on board ships has appeared to contribute to improved mental health and well-being of seafarers.

- The provision of internet access to seafarers for personal use on board ships has appeared to contribute to improved morale of seafarers.

- The provision of internet access to seafarers for personal use has not appeared to contribute to an increase in the number of reported incidences of anxieties among seafarers related to family or friends.

- The provision of internet access to seafarers for personal use on board ships has not appeared to contribute to an increase in the number of reported incidences of bullying or harassment.