Paving the way for the digitalization of the road transport

Project n° IFPN-100194 - Final Report

Version number:	01
Language:	English
Title:	Paving the way for the digitalization of the road transport documentation in Italy: final report
Main author:	Uniontrasporti
Dissemination level:	Public
Lead contractor:	Unioncamere/Uniontrasporti
Due date:	31/08/2025
Delivery date:	28/8/2025
Delivery date updated document:	-

CONTROL SHEET

Version history			
Version	**Date**	**Main author**	**Complete %**
01	24/07/2025	Luca Zanetta	25%
02	1/08/2025	Jennifer Casula Luca Zanetta	50%
03	8/8/2025	Luca Zanetta	100%
04	26/08/2025	Luca Zanetta	Incorporation of comments and suggestions

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Circulation			
Recipient	**Date of submission**		

Table of contents

List of figures

List of tables

Acronymes

CATI	Computer Assisted Telephone Interview
CEF	Connecting Europe Facility
CMR	Convention des Marchandises par Route
e-CMR	Electronic CMR
eFTI	Electronic Freight Transport Information
e-TIR	Electronic Transport International Routier
GPS	Global Positioning System
IRU	International Road Transport Union
MIT	Italian Ministry of Infrastructures and Transports
MSME	Micro Small and Medium Enterprise
PID	Digital Business Point
PNRR	Piano Nazionale di Ripresa e Resilienza

1 Introduction

At the end of 2023, around thirty-three countries had ratified the Additional Protocol to the Convention on the Contract for the International Carriage of Goods by Road (CMR) concerning the Electronic Consignment Note (e-CMR).

The Italian Government has indicated the signature of the Additional Protocol among the milestones of the PNRR (Piano Nazionale di Ripresa e Resilienza) and specifically in mission 3 - component 2 on the matter of simplification of logistical procedures and digitization of documents.

This milestone was achieved in March 2024 just few months before the kick-off of this project "Paving the way for the digitalization of the road transport documentation in Italy" co-financed by IRU (International Road transport Union) and Italian Union of Chambers of Commerce, Industry, Handicraft and Agriculture – Unioncamere, with the technical support of Uniontrasporti, that aims at raising awareness among all the actors of road freight transport in Italy (from the freight sender to the carrier up to the recipient) about the digitalization of the transport document (benefits, impacts, instruction for the implementation, ..) to pave the way to the adoption of the digital consignment note (e-CMR) that can be considered one of the first application of the eFTI regulations

This project proceeds the actions of the project "Towards the Implementation of the e-CMR system in Italy", started in 2021 and concluded at the end of 2022, always co-financed by IRU and Unioncamere, with the technical support of Uniontrasporti focused on testing and promoting the use of electronic waybills for road transport to/from Italy.

Both projects were developed under the *e-CMR Italy* initiative (https://ecmritaly.unioncamere.it/) one of the several action put in place by the Italian Chambers of Commerce system to support the digital transformation of the transport and logistics companies and more in general of the companies operating in different economic sectors.

The International Road Transport Union has promoted the introduction of a digital consignment note, e-CMR, as a secure and reliable way to exchange digital data between public institutions, actors in the transport chain and service providers since 2008. Nevertheless, the e-CMR is not yet a widespread standard practice in road freight international transport, non-only because some Countries have not yet ratified the related protocol but also because there are some resistances of companies to make the digital leap.

2 Scope of the project

The scope of the project "Paving the way for the digitalization of the road transport documentation in Italy" is to prepare the ground for a rapid, widespread and, if possible, smooth adoption of the electronic consignment note and, more generally, of an electronic format for the various documents required in international but also national road freight transport.

Like the paper CMR, the e-CMR must be completed and signed by different parties at specific times. Therefore, its use must be agreed upon and shared by at least the three main parties involved in road freight transport: the sender, the carrier, and the recipient.

The transition from a paper document to an electronic document involves a change in the tools used to do things: typically filling out and signing the document.

This transformation must be undertaken by all three entities, each of which employs personnel who may not have the digital skills required by the new operating context.

The same considerations also apply to the Authorities or bodies that must verify the accuracy of the transport documentation on the road.

In this context, raising awareness about the opportunities offered by the digitization of road freight transport documents is essential, as well as the measures that each of these actors must adopt, including in coordination with others. In fact, the adoption of e-CMR will produce the expected benefits only if all stakeholders along the road freight transport supply chain collaborate.

To maximize the reach and appeal of the awareness campaign, the project aims to actively involve the most relevant Italian transport and logistic trade associations and various national and international e-CMR application providers in the design and organization of the activities.

3 Project objectives

The Italian Government approved Italy's accession to the Additional Protocol to the Convention on the Contract for the International Carriage of Goods by Road (CMR) concerning the Electronic Consignment Note on March 4th, 2025 (Law No. 37 of March 8, 2024).

From 26 September, electronic waybills (e-CMR) will be fully operational in Italy as well, marking a decisive step towards the digitization of road freight transport.

However, the adoption of the e-CMR by Italian companies still needs to be supported and facilitated through promotional and dissemination activities that spread awareness of the advantages of using digital documentation and how to approach the introduction of digital documents into road freight international transport operational processes.

Moreover, all the various actors involved in road freight transport, sender, carrier, recipient, and the Authorities deputy to the control of the transport documentation, must work together in order to define and agree how to manage digital documents of which the electronic consignment note represents only the first (or one of the first) applications.

On this basis, the following objectives were identified for this project, "Paving the way for the digitalization of the road transport documentation in Italy":

- **Objective 1:** dissemination activity on the trends of digitization of transport documents;

- **Objective 2:** facilitate networking and meeting between the stakeholders involved in the digital transformation process of the transport document, namely:
  - ✓ Businesses/operators;
  - ✓ Technology providers;
  - ✓ Authorities and their technical bodies;

- **Objective 3**: identify obstacles and solutions to implementation, surveying the stakeholders involved and through the interface of the associations.

To maximize the achievement of these objectives, Unioncamere, with the technical support of Uniontrasporti, has involved the most important Italian logistics and transport trade associations in defining the high-level content of the dissemination activity and in communicating the project's actions to its members (logistics and transport operators).

4   Project description

To achieve the objectives indicated, the Project was structured into the following five actions:

- Action 1 - Project Management
- Action 2 - Awareness raising activities (e-CMR awareness campaign and supply-demand meeting)
- Action 3 - e-CMR document control process: concept idea
- Action 4 - Road transport document digitalization survey: Italian scenario
- Action 5 - Communication

4.1   Action 1 - Project Management

This action ensures that the project achieves all its objectives, with a high level of quality, on time and within the allocated budget. In addition, it manages and facilitates a continuous flow of information and exchange among the teams involved in the Project and the relations with external stakeholders and partners. The governance of the project entrusted to Unioncamere guaranteed the networking with the trade associations and Authorities through various moments of discussion throughout the duration of the activities which allowed for the sharing of actions with stakeholders.

4.2   Action 2 - Awareness raising activities

Most Italian companies operating in the transport and logistics sector are small and medium-sized enterprises (SMEs) and therefore have limited time and resources to stay up to date on technological and regulatory developments, as well as perform a detailed scouting of the IT solution providers.

Considering the ratification of the additional protocol to the CMR convention by the Italian Government in April 2024 and the imminent entry into force of the eFTI regulation, an awareness raising campaign was considered fundamental to support a quick adoption of e-CMR by the Italian companies to increase their competitiveness in the market

This campaign was carried out by organizing webinars, open to all (upon registration through the "ecmritaly" website developed in the previous project "Towards the implementation of the e-CMR system in Italy").

More in detail, two sub-actions were performed:

1. **e-CMR awareness campaign:** to inform the Italian road transport community including the shippers and the recipients about the technological trends (such as e-CMR) and the regulatory framework evolutions (such as the eFTI framework regulation) of the digitization of the documents requested in the road freight transport.

2. **Supply-demand meetings:** in which a technology provider (representing the supply side) presents its e-CMR solution not only to companies in the transport and logistics sector but also to companies operating in the manufacturing, wholesale and retail trade of goods (representing the demand side).

The two sub-actions were decided to carry out in sequence because the "e-CMR awareness campaign" creates the conditions for the subsequent "supply-demand meetings".

In both the sub-action, the most relevant Italian transport and logistic trade associations (Assotir, Contrasporto, FAI, ANITA, CNA/FITA, Confartigianato Trasporti, Fedespedi, FIAP e Trasportounito) were involved discussing with them the design and organization of the webinars. Furthermore, the associations collaborated closely with "Action 5 – Communication" for the Project, informing their members about the scheduled webinars.

The "supply-demand meetings" were organized using a technology-neutral approach.

Special attention was given to ensure that the webinar was a dedicated and controlled space for the presentation of an e-CMR solution, not only via slides but also via demo establishing a series of rules for the organization and management of the webinar (Annex 8.1).

Then the e-CMR providers involved in the pilot of the previous project "Towards the Implementation of the e-CMR system in Italy" (Accudire, Poinira, Transfollows) and the suppliers recommended by the associations were directly contacted to illustrate the opportunity, offered by the project, to present its own solution to the Italian market.

At the same time, this information was also published on the "www.ecmr.italy" website (news "e-CMR Italy – The first cycle of e-CMR webinars has concluded: the second phase begins" on February 11, 2025), to reach other e-CMR suppliers potentially interested in this initiative.

Consistent with the expected duration of this sub-action in the project, for all e-CMR providers who expressed interest in the initiative and accepted the defined rules for the webinars, a dedicated "supply-demand meeting" was organized.

The "demand" was informed of the webinars with specific communication actions (including communications on the website "www.ecmr.italy") and through the involvement of trade associations.

4.3 Action 3 - e-CMR document control process: concept idea

Through an open and constructive discussions with the main transport and logistics associations from one side and with the Italian Ministry of Transport on the other side, a procedure for the roadside e-CMR control will be defined.

4.4 Action 4 - Road transport document digitalization survey: Italian scenario

The scope of this activity is the assessment of the current state, challenges and needs regarding the adoption of digital transport documents in Italy.

In the previous project "Towards the implementation of the e-CMR system in Italy" (2021-2022) an analysis of the Italian scenario regarding the digitalization of documents for the transport of goods by road to identify any critical issues that could have hindered the adoption of the e-CMR, was performed.

At that time, the Italian Government had not yet signed the additional protocol to the CMR convention and since then the technological and regulatory scenario evolved a lot.

Therefore, a new survey was conducted on the use of digital documents in national and/or international road freight transport, with a specific focus on knowledge and expectations related to the e-CMR (but not limited to this document).

Keeping the same size and distribution of the sample of the survey dated 2022 (1,600 Italian companies operating in the national and international road transport sector of which 1,100 operating solely at national level and 500 operating also at international level), substantially the same questions have been asked (with minor modifications) in order to be able to compare the responses obtained in the two surveys.

Furthermore, it was decided to extend the analysis scenario by asking the same questions to approximately 500 manufacturing companies that use road transport for the export of goods, to identify any differences in the responses of these actors in the road transport supply chain.

The questionnaire was administered between April and May 2025 and the survey report, the most significant results of which are reported in chapter 6.4, in addition to the analysis of the responses from the two

"categories" of companies interviewed (transport and logistics companies and manufacturing companies), includes a series of comparisons with the results of the 2022 survey (for the first category of interviewees).

4.5   Action 5 - Communications

This action is strategic element for reaching the Project's objectives (chapter 3).

Therefore, an integrated and coherent communication strategy was developed and implemented. The aim was to support all operational phases with targeted actions focused on information dissemination, promotion, and stakeholder engagement. A multi-channel approach was followed to design communications activities to ensure visibility for the project's key messages, foster the dissemination of results, and strengthen the sense of ownership among the partners involved.

In particular, actions focused on disseminating knowledge of the technological and regulatory evolution of the digitalization of road transport documents, and those to facilitate the networking among all stakeholders involved in this digital transformation process, even if with different roles - such as Authorities and their technical bodies, technology providers, and supply chain operators - must be supported by effective and timely communications efforts.

Therefore, an intensive communications campaign has been conducted on "ecmritaly.it" website (the website, originally developed as part of the project "Towards the implementation of the e-CMR system in Italy," was updated including both projects under the "e-CMR Italy" logo) and through the social media channels (e.g., LinkedIn, YouTube) of Unioncamere and Uniontrasporti.

4.6   Project GANTT

In Figure 1 the planned GANTT is depicted.

The project ran from July 2024 to June 2025: twelve months in total.

Over the course of the project, improved awareness of certain aspects, on the one hand, and the need to address the impact of external factors, on the other, resulted in a different timeline than planned in the GANTT for some activities, without, however, impacting the overall project duration or the expected outputs.

On the contrary, the quality of the objectives benefited.

Paving the way for the digitalization of the road transport documentation in Italy

ACTION	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	Jun.		Jul.	Aug.
	1	2	3	4	5	6	7	8	9	10	11	12		13	14
Project Management	M1														
Awareness raising activities				M2											
e-CMR awareness campaign															
Supply-demand meetings															
e-CMR document control process: concept idea															
Survey: transport doc. digitaliz. - Italian scenario										M3					
Communications												M4			
Project start	X														
Project end												X			
Deliverable										D1					D2

Figure 1: Project GANTT diagram

5 Project deliverables

As can be seen in Figure 1, two are the deliverables produced:

- D1: *e-CMR and e-FTI survey in Italy: transport, logistics, and manufacturing companies* in Italian (**Indagine e-CMR e e-FTI in Italia: imprese dei trasporti, della logistica e della manifattura**);

- D2: **Paving the way for the digitalization of the road transport documentation in Italy: final report.**

A brief description of the content of deliverable D1 is provided below[1].

5.1 **Deliverable 1** – "Indagine e-CMR e e-FTI in Italia: imprese dei trasporti, della logistica e della manifattura"

This document (in Italian) contains the results of a survey conducted among Italian companies in the manufacturing, transport, and logistics sectors. The aim of this survey was to assess the level of digitalization and current practices in managing documentation related to road freight transport, and to identify the main obstacles and expected benefits from adopting electronic documents, with a focus on e-CMR (action 4).

A 74-question survey was submitted to over 1.600 Italian companies that provide road transportation services differentiated in two main groups: the ones the work in Italy only and the one that work internationally.

Moreover, a subset of these questions, 57 questions, was also submitted to a sample of more than 500 Italian manufacturing companies that export by a road transport their goods.

The questions of the survey are divided into six main areas covering the following subjects:

- Digitization of processes
- Electronic instruments on board
- CMR
- e-CMR
- TIR/e-Tir
- Knowledge of legislation

Plus, some questions to characterize the sample survey of the survey, such as size, turnover and number of road transport carried out in a year.

The survey was designed based on the survey conducted as part of the project "Towards the implementation of the e-CMR system in Italy" to detect any changes compared to 2022 in the behaviors and opinions of companies in the economic sector considered (transport and logistics).

Some of the most significant outputs of the survey are reported in chapter 6.4.

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[1] The deliverable D2 is this report.

6   Key achievements of the project

In the following chapters the key results achieved in the actions of the Project are presented.

In particular, the focus is on Action 2, Awareness raising activities, and Action 4, Road transport document digitalization survey: Italian scenario.

6.1   e-CMR awareness campaign

The objective of this campaign is to inform the Italian road freight transport community about the possibility to improve the efficiency in the management of the international consignment note opened by the recent ratification of the Addition Protocol to the Convention on the Contract for the International Carriage of Goods by Road (CMR) by Italian Government.

However, numerous questions and doubts regarding various operational, administrative, and legal aspects must be answered before a company decides to use the electronic consignment note instead of the well-known paper version.

In fact, it's not enough to simply inform companies about what the e-CMR is, what its benefits are, and the fact that it can now also be used in Italy (starting in September 2024). It's also necessary to clearly and thoroughly explain how the current operational process (with the paper CMR) will need to change to use the e-CMR, how this documentation will be checked along the way, what requirements the e-CMR must meet to have the same legal value as its paper version, and so on.

Therefore, it was decided to organize three webinars, each one with a specific focus related to the electronic consignment note:

- e-CMR and the digital transition of road freight transport documents
- What a company needs to know before using e-CMR, including regulatory issues and enroute controls procedures.
- Experience and lessons learned from pioneering e-CMR users in Italy.

Depending on the focus of the webinar, several speakers were invited, from representatives of the Italian Ministry of Infrastructure and Transport to university professors, lawyers, traffic police inspectors, and some of Italy's leading transport and logistics operators.

To facilitate company participation, it was decided to organize webinars rather than in-person events.

The first webinar "e-CMR: una realtà anche per l'Italia" (e-CMR: a reality for Italy too), was held on October 23, 2024, about a month after the e-CMR became fully operational in Italy. As it can see by looking at the agenda (Figure 2 - in Italian), this webinar had an institutional approach (the others have been more operational) with the participation of representatives of the Ministry of Infrastructure and Transport and RAM, its internal logistics, infrastructure, and transport company, as speakers.

The second webinar "e-CMR: istruzioni per l'uso" (e-CMR: instructions for use) was held on November 19, 2024 (see the agenda in Figure 3 – in Italian) with speakers with expertise in various fields: strategic, operational, legal, regulatory compliance.

The last one of this series of webinars, "e-CMR: le esperienze delle imprese" (e-CMR: the experiences of companies) was held on January 21, 2024 (see the agenda in Figure 4 – in Italian). It's important to note that many of the companies that accepted to share its experiences on the e-CMR in this webinar were the actors of the e-CMR pilot in the previous project "Towards the implementation of the e-CMR system in Italy" that can be considered one of the most relevant experiences of the early day of the -CMR in Italy.

e-CMR: una realtà anche per l'Italia
23 ottobre 2024

15.00   **Saluti di benvenuto**
Marco Conte, vicesegretario generale di Unioncamere

15.10   **e-CMR e transizione digitale della logistica, sfida e opportunità per le imprese di autotrasporto**
Enrico Finocchi, Presidente del Comitato Centrale Albo Autotrasportatori

15:20   **Interoperabilità e la sicurezza informatica per la competitività del sistema logistico nazionale**
Donato Liguori, Direzione generale per i porti, la logistica e l'intermodalità – Ministero delle Infrastrutture e dei Trasporti

15:35   **Opportunità di finanziamento a supporto della transizione digitale**
Francesco Benevolo, Direttore operativo RAM Spa

15:55   **I controlli su strada: dalla CMR alla e-CMR**
Luciano Consalvi, Vice Ispettore della Polizia di Stato - Dipartimento della Pubblica Sicurezza – Servizio Polizia Stradale

16.15   **La digitalizzazione dei documenti legati alla consegna: approcci e benefici**
Paola Olivares, Direttrice dell'Osservatorio Digital B2b del Politecnico di Milano

16.35   **Progetto «Paving the way for the digitalization of the road transport documentation in Italy»**
Luca Zanetta, Responsabile Area BUL e 5G di Uniontrasporti

16.50   **Domande e risposte**

17.15   **Fine dei lavori**

Modera e coordina Antonello Fontanili, Direttore Uniontrasporti

UNIONCAMERE   con il supporto tecnico di UNIONTRASPORTI   In collaborazione con RAM Spa

Figure 2: e-CMR awareness webinars - Agenda of the webinar on October 23, 2024

e-CMR: istruzioni per l'uso
19 novembre 2024

14.30   **Saluti di benvenuto**
Alessandra Procesi, Responsabile Ufficio Registro Imprese e Convenzioni internazionali - Unioncamere

14.40   **e-CMR: opportunità e sfide**
Luca Zanetta, Responsabile Area BUL e 5G - Uniontrasporti

15:00   **La e-CMR: normativa internazionale, profili giuridici e implicazioni pratiche**
Rosa Abbate, Avvocato specializzato in diritto dei trasporti – PG Legal

15:25   **Il Change Management nel passaggio alla e-CMR: organizzazione, operatività, contrattualistica**
Abramo Vincenzi, CEO - Accudire Srl

15:50   **Dalla CMR alla e-CMR: nuove prospettive per i controlli al trasporto merci su strada**
Luciano Consalvi, Vice Ispettore della Polizia di Stato - Dipartimento della Pubblica Sicurezza – Servizio Polizia Stradale

16.15   **Domande e risposte**

16.30   **Fine dei lavori**

Modera e coordina Antonello Fontanili, Direttore Uniontrasporti

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Figure 3: e-CMR awareness webinars - Agenda of the webinar on November 19, 2024

e-CMR: le esperienze delle imprese
21 gennaio 2025

14:30	**Saluti di benvenuto** Alessandra Procesi, Responsabile Ufficio Registro Imprese e Convenzioni internazionali - Unioncamere
14:35	**e-CMR: come funziona** Michele Checchin, CEO - Chemex Srl
14:50	**e-CMR per lo spedizioniere: vantaggi e criticità di utilizzare la e-CMR con autotrasportatori terzi** Alessandro Barbiero, CEO - Barbiero Spa
15:10	**Codognotto 5.0: pronti per implementare la e-CMR** Matteo Benvenuti, Innovation Manager - Codognotto Spa
15:30	**Il futuro della e-CMR in Fercam** Hansjörg Faller, Direttore divisione trasporti internazionali - Fercam Spa
15:50	**Un anno dalla prima e-CMR: vantaggi e criticità del cambiamento** Claudio Riva, CEO - Riva Logistics & Services Srl
16:10	**L'esperienza di Epta spa: scenario di riferimento, questioni operative e prospettive future** Raniero Spaziani, Group Tax Manager e Manuela Fiore, Group Logistics Process Owner - Epta spa
16:30	**Dal trasporto nazionale a quello internazionale: sperimentazioni e opportunità con il documento digitale e-CMR** Giuliano Gugel, Direttore Operativo - Gugel
16:50	**Domande e risposte**
17:00	**Chiusura lavori**

Modera e coordina Antonello Fontanili, Direttore Uniontrasporti

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Figure 4: e-CMR awareness webinars - Agenda of the webinar on January 21, 2025

All three webinars were well attended (see Table 1): nearly three hundred people attended each webinar, with a peak of over four hundred in the first. In total, approximately one thousand people (993) attended this webinar series, representing nearly seven hundred companies (684).

These numbers demonstrate the great interest of Italian companies in the electronic consignment note but also their need to learn more.

Webinar / Participants	e-CMR: a reality for Italy too	e-CMR: instructions for use	e-CMR: the experiences of companies	Total
Presence (nr.)	428	294	271	993
Companies (nr.)	302	204	178	684

Table 1: e-CMR awareness webinars - Audience

As can be seen in Figure 1, most companies participating in the webinars belong to the "transportation and distribution" sector: approximately half of the companies in each of the three webinars belong to this economic sector (57% in the first webinar, 48% in the second, and 48% again in the third).

There was also significant participation from "manufacturing" companies (15%, 23%, and 22%), followed by companies in the "agriculture" sector (5%, 9%, and 5%).

Considering that the key actors in freight transport are the sender, the carrier and the recipient that can be identified in manufacturing or agriculture companies (sender), transport and distribution companies (carrier)

and manufacturing or wholesale/retail companies (recipient), respectively, the webinars can be considered very successful: in fact more than two/third of the company are from these economici sector.

It is important to note that interest in the webinars was maintained throughout the series.
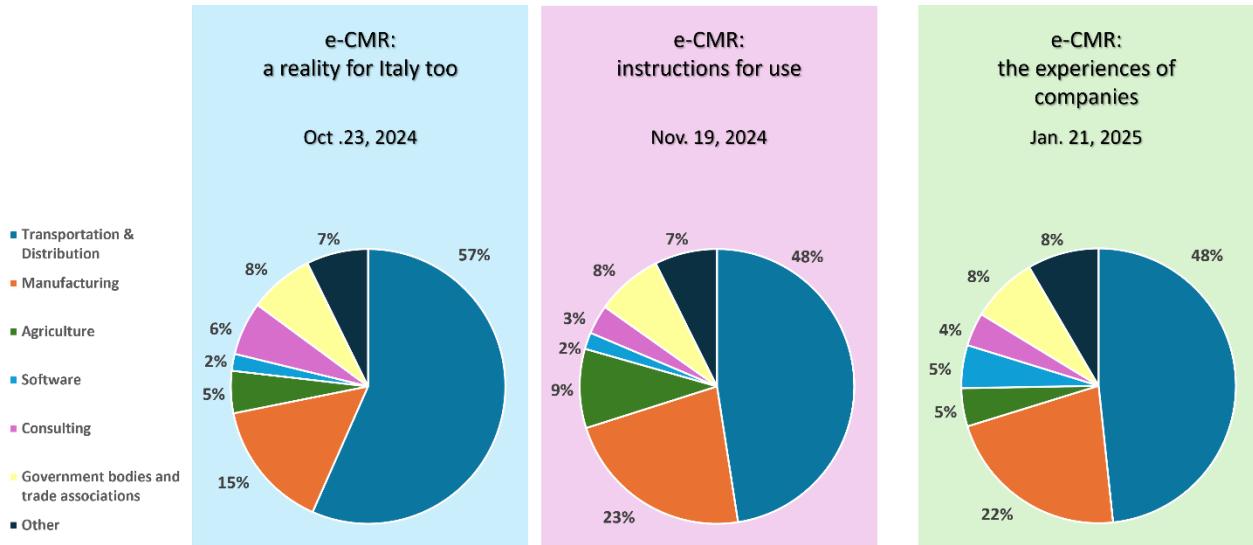
Figure 5: e-CMR awareness webinars - Distribution of the participating companies by economic sectors

6.2   Supply-demand meetings

As already said, the Italian manufacturing, transport, and logistics landscape is characterized by micro, small, and medium-sized enterprises (MSMEs) that, in general, lack the time and resources not only to stay informed about the evolution of the digital technologies and the associated regulations in the field of the digitization of transport documents, but also to scout potential providers of the new IT applications available on the market.

Therefore, the aim of this sub-action was to facilitate the matching between providers of e-CMR applications (and more generally, electronic document applications for road freight transport) and their potential users, with the ultimate goal of accelerating the adoption of the electronic consignment note and, more generally, the use of "digital" documents for road freight transport by Italian companies.

All the e-CMR providers to whom we presented this opportunity (some contacted directly, while others contacted us after reading the news on the "ecmritaly" website) enthusiastically joined the initiative.

This allowed us to organize six one-hour supply-demand meetings, each dedicated to a specific e-CMR application provider, between February and May 2025:

- Accudire on February 25, 2025;
- Pionira on March 11, 2025;
- Transfollow (ViaService) on March 25, 2025;
- Transporeon on April 8, 2025;
- Tesisquare on May 13, 2025;
- BitCargo on May 27, 2025.

Figure 6: Supply-demand meetings - e-CMR application providers

For each of this event a specific communication campaign was made using different channels, the ecmritaly website, Uniontrasporti and Unioncamere social media channels, direct mailing, with also the support of the most relevant Italian transport and logistic trade associations (Assotir, Contrasporto, FAI, ANITA, CNA/FITA, Confartigianato Trasporti, Fedespedi, FIAP e Trasportounito).

These efforts were rewarded with a large participation in these meetings: more than **800 participants** (855), representing **600 companies** (586) in total.

Supply-demand meeting *	Participants: heads	Participants: companies
A	131	93
B	128	83
C	153	105
D	83	58
E	189	136
F	171	111
TOTAL	**855**	**586**

Note *: Meetings are not listed in chronological order.

Table 2: Supply-demand meetings - Participants

Several companies attended more than one meeting: **almost 11% of the companies participated in more than three meetings** (Figure 7) confirming to appreciate these events also from the perspective of scouting technological solutions.
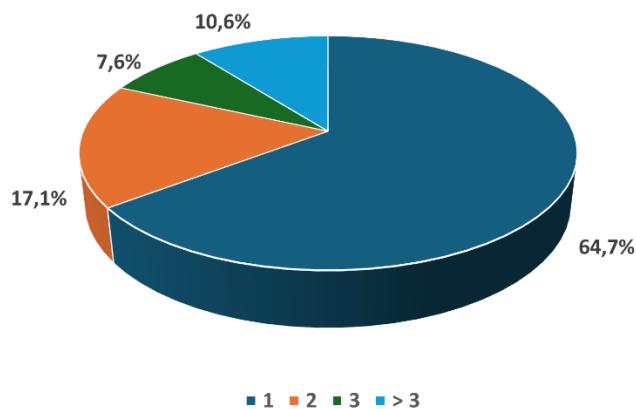
Figure 7: Supply-demand meetings - Frequency of attendance at meetings

The "single companies [2] " that attended the series of the supply-demand meetings were **340** in total.

Most of them belong to the "transportation and distribution" sector (39%), followed by the manufacturing companies (31%). It's worth noticing that the main actors in road freight transport, manufacturing and agricultural companies on one side (sender) and transport & distributions companies on the other (carrier), account for almost three quarters of the audience (73%).
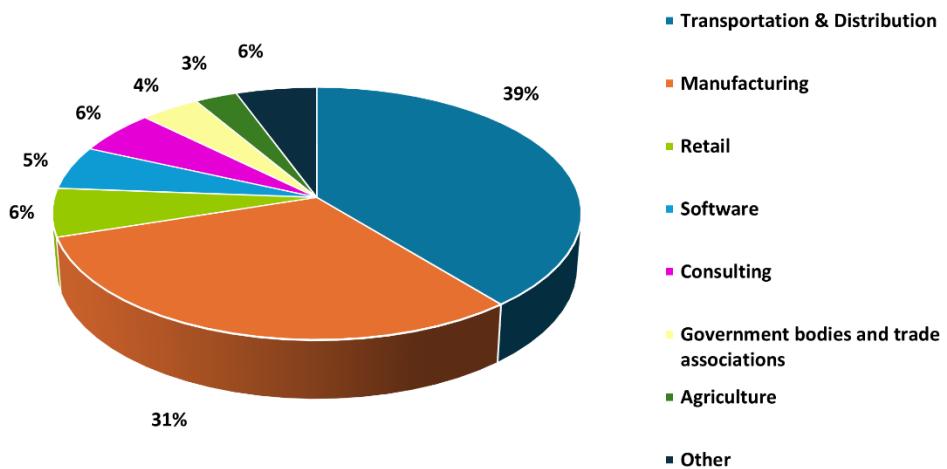
Figure 8: Supply-demand meetings - Distribution of the participating companies by economic sectors

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[2]   Single company: If employees from a given company have attended more than one meeting, the company is counted only once, regardless of the number of meetings attended and the number of employees.

6.3   e-CMR enroute control

One of the recurring questions asked during the webinars was: "How is the e-CMR checked by the police or other bodies responsible for checking the documents that the truck driver must have?".

This question highlights the importance for companies to fully understand how the check of the e-CMR will be performed along the route to properly train drivers.

It's not just the fear of a potential fine, but also the impact on transport operations of a potentially more time-consuming and complex check of an electronic document compared to a paper one.

Thanks to the participation of a representant of the traffic police as a speaker in the first two webinars, the e-CMR control process was explained to the companies and the reference to the proper normative was given.

What anticipated in the webinars was confirmed by the approval by of the "General Director for road safety and road transport " of MIT, on December 20, 2024, of the checklist prepared by the Ministry of the Interior, with the aim of standardizing and making roadside inspection activities more efficient (see Gazzetta Ufficiale nr. 3 - January 4, 2025): in the checklist, the electronic consignment note is indicated as one of the documents that the driver can present and consequently it is one of the documents that an agency responsible for on the road controls must check.

Provided that a driver can show the electronic consignment note on a tablet, smartphone, or other device to the officer, as the e-CMR must contain the same data required in the paper CMR, any penalty will be based on the accuracy and completeness of the data and not on the use of a "digital media."

6.4   Survey key results

This chapter briefly presents the results of two surveys: the first on a sample of road haulage companies and the second on a sample of manufacturing companies that export/import a significant portion of products/materials using road transport.

The survey questions were virtually identical for both samples and similar enough to those of the 2022 survey to allow for comparison of the responses provided by road haulage companies with those of 2022, on the one hand, and with those provided by manufacturing companies, on the other.

The surveys were conducted using CATI (Computer Assisted Telephone Interview) methodology with the operational support of Format Research Institute, during the period April-May 2025.

The overall survey results constitute the deliverable 1 – "Indagine e-CMR e e-FTI in Italia: imprese dei trasporti, della logistica e della manifattura"in Italian.

The sample of road haulage companies consisted of 1,611 firms, of which 1,100 operated exclusively domestically and 511 also operated internationally, while the sample of manufacturing firms consisted of 508 that made purchases from abroad or sold abroad for at least 20% of their total purchases or sales.

Both samples are representative of the respectively universe of companies in Italy [3].

The some of the characteristics of the two samples are in Figure 10 and in Figure 11.

---

[3]   Road haulage companies' sample: 95% confidence interval (error $\pm$4,3%).

Manufacturing companies' sample: 95% confidence interval (error $\pm$2,4%).

UNIVERSE of transport companies by area and size

Area	TOTAL	Class of employees	TOTAL
North West	15,825	1-9	54,351
North East	17,205	10-49	7,504
Center	10,938	>50	862
South and Islands	18,749	TOTAL	62,717
TOTAL	62,717		

Source: I.stat-Ice 2024.

SAMPLE of transport companies by area and size

Area	TOTAL	Class of employees	TOTAL
North West	516	1-9	818
North East	324	10-49	708
Center	270	>50	85
South and Islands	501	TOTAL	1,611
TOTAL	1,611		

UNIVERSE of manufacturing companies that export and import by area and size

Area	TOTAL	Class of employees	TOTAL
North West	24,169	1-9	24,399
North East	18,127	10-49	26,371
Center	12,085	>50	9,653
South and Islands	6.042	TOTAL	60,423
TOTAL	60,423		

Source: I.stat-Ice 2024.

SAMPLE of manufacturing companies that export and import by area and size

Area	TOTAL	Class of employees	TOTAL
North West	227	1-9	222
North East	80	10-49	255
Center	112	>50	31
South and Islands	89	TOTAL	508
TOTAL	508		

Figure 9: Universe and sample
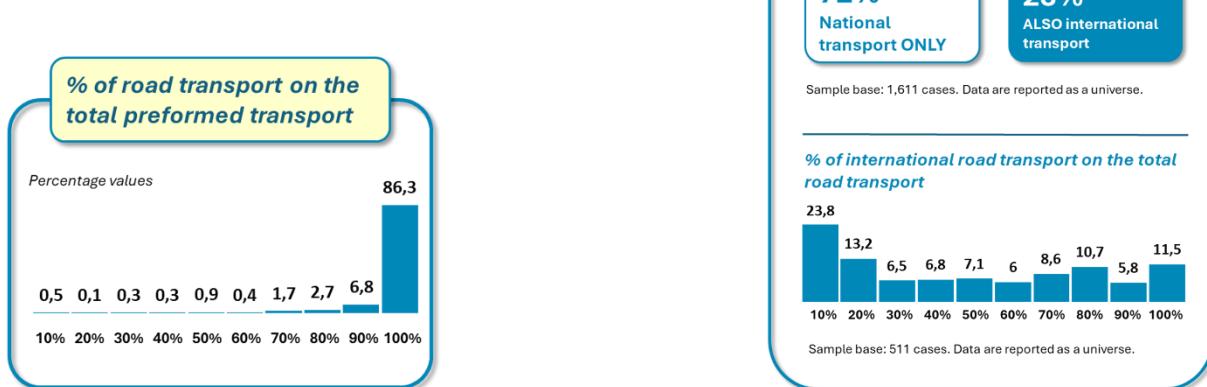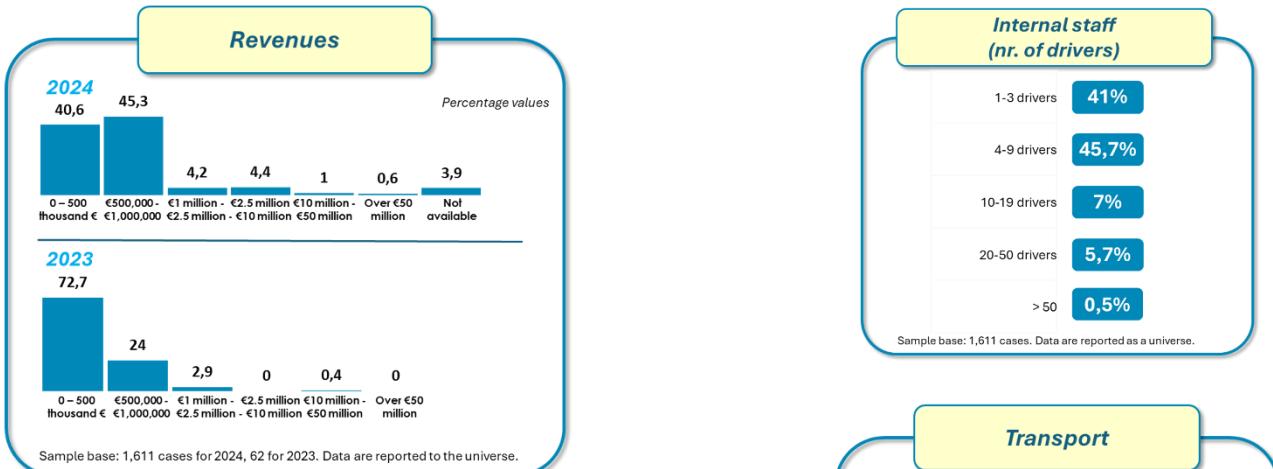
Figure 10: Road transport sample - Some characteristics

Revenues 2024

	8,5	24,3	24,6	22,6	9,4	1	9,5
	0 – 500 thousand €	€500,000 - €1,000,000	€1 million - €2.5 million	€2.5 million - €10 million	€10 million - €50 million	Over €50 million	ND

Freight transport management

100% with our staff	7,7%
75% with our staff and the rest with external transporters	7,6%
50% with our staff and the rest with external transporters	9,1%
25% with our staff and the rest with external transporters	5,8%
100% with external transporters	69,8%

% of road transport on total transport carried out

Percentage values

10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
2,7	2,2	2,4	1,2	3,7	2,9	9	8,6	4,7	62,5

% of international transport on total transport

Percentage values

10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
15,9	9,5	5,7	4,4	12,2	7,4	9,5	14,2	12,4	8,7

Sample base: 508 cases. Data are reported as a universe.

Figure 11: Manufacturing sample - Some characteristics

6.4.1 Transport companies: comparative insights of 2022 and 2025 surveys

The picture that emerges from comparing 2022 and 2025 shows a profoundly transformed business landscape. This is not simply a matter of greater technological diffusion, but a paradigm shift: digitalization is evolving from a tactical tool to a strategic lever.

This is set against a backdrop of uncertain and complex macroeconomic conditions: structural increases in operating costs, European regulatory pressure (eFTI Regulation adoption), and geopolitical tensions impacting value chains.

Yet, precisely in this scenario, the sector is responding by choosing—in part—to accelerate the technological transition, albeit with significant differences related to the structure, size, and location of companies.

The digitalization of operational processes (logistics, transportation, warehousing) is one of the areas where change is most pronounced: by 2025, nearly 90% of companies have at least partially implemented digital tools, compared to 70% in 2022 (Figure 12. At the same time, the average level of digitalization is increasing (49,7%), albeit with significant regional and size disparities.

How digital are your operational processes (freight operations, warehouse logistics, etc.)?

49,7% is the average level of digitalization of **operational processes**

87,8% of companies have at least partially digitalized their operational processes

70,7% in 2022

	Managed only on paper	25%	50%	75%	Fully digitalized
	12,2%	26,3%	25,6%	22,4%	13,5%
2022	29,3%	15%	29,7%	16,3%	9,7%

Accentuations

	Total	Northwest	Northeast	Center	South and Islands	1-9 employees	10-49 employees	>50
Completely	13,5	12,2	16,6	14,0	11,4	12,5	18,6	31,8
75%	22,4	25,0	20,9	27,4	18,8	21,5	27,9	33,7
50%	25,6	23,6	24,2	26,9	27,9	25,1	28,6	32,5
25%	26,3	28,5	25,9	19,6	28,6	28,0	16,6	2,0
Our operational processes are managed only on paper	12,2	10,6	12,4	12,1	13,4	12,9	8,4	0,0

Percentage values

Sample base: 1,611 cases. Data are reported as a universe.

Figure 12: Transport 2025-2022 - Digitalization of operational processes

The digitalization of administrative processes appears even more structured: 98,2% of companies report using digital tools for document management, ordering, and invoicing, compared to 94% in 2022 (Figure 13) In this area, the transition appears to have occurred almost completely, signaling a progressive standardization of management practices.

How digital are your administrative processes (order management, invoicing, etc.)?

68% is the average level of digitalization of **administrative processes**

98,2% of companies have at least partially digitalized their administrative processes

94% in 2022

	Managed only on paper	25%	50%	75%	Fully digitalized
	1,8%	10,9%	28,8%	30,4%	28,1%
2022	6%	11,6%	29,8%	28,2%	24,5%

Accentuations

	Total	Northwest	Northeast	Center	South and Islands	1-9 employees	10-49 employees	>50
Completely	28,1	29,6	29,7	29,5	24,6	27,3	32,1	42,9
75%	30,4	29,5	27,2	30	34,3	29,5	35,3	42,4
50%	28,8	31,2	30,7	26,7	26,2	29,3	26,6	14,7
25%	10,9	8,3	11,5	10,9	12,5	11,8	5,6	0
Our administrative processes are managed only on paper	1,8	1,4	1	2,9	2,4	2,1	0,4	0

Percentage values

Sample base: 1,611 cases. Data are reported as a universe.

Figure 13: Transport 2025-2022 - Digitalization of administrative processes

Communication between companies and customers/suppliers offers a prime example of "partial modernization" (Figure 14): email is now ubiquitous (98%), interfaces integrated with IT systems are becoming more widespread (15,7%), but a significant share (13,1%) still relies on paper—albeit a decline of more than 12 percentage points compared to 2022. Paper isn't disappearing, but it's retreating.

How do you communicate with customers/suppliers?

In paper form	By email	Direct interface of customer/supplier IT environments	Other
13,1%	**98%**	**15,7%**	**1,6%**
In 2022 it was **25,7%** ↓	In 2022 it was **95,3%** ↑	In 2022 it was **14,7%** ↑	In 2022 it was **0,5%** ↑
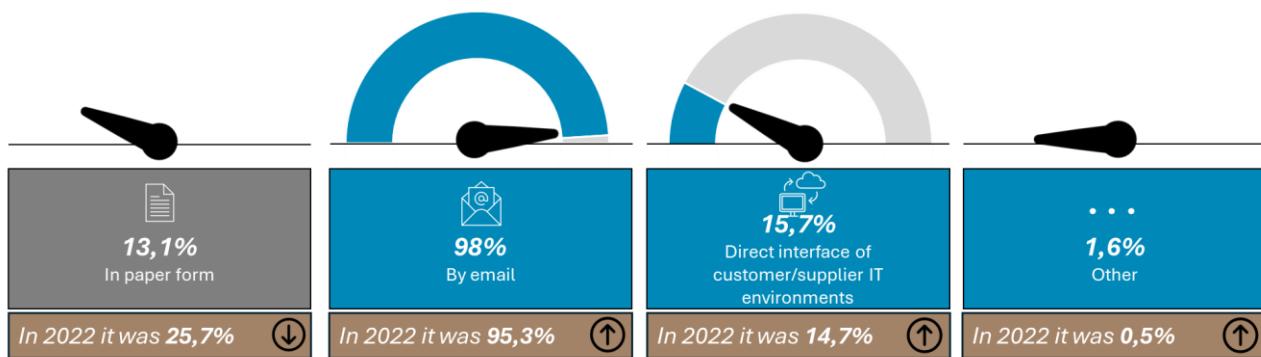
Sample size: 1,611 cases. Data are reported as a whole. The sum of responses is greater than 100% as multiple responses are permitted.

Figure 14: Transport 2025-2022 - Communications methods

Companies recognize the advantages of electronic management: real time, paper elimination, and accelerated flows (Figure 15). However, a cultural and infrastructural gap persists between the expected benefits and actual practice.

How advantageous (on a scale of 0 to 10) do you consider the following potential effects of using documents in electronic form?

Percentage values %

	0-6	7-8	9-10	2022 data VOTES 9-10
Real-time information exchange	29,8	33,0	37,1	35,3
Elimination of paper documents	30,9	34,2	34,9	31,4
Speed of invoicing and payment	31,2	33,8	34,9	32,6
Digital archive instead of physical	31,1	34,2	34,8	32,7
Ease of document management	30,5	35,8	33,7	32,4
Greater efficiency of operations	33,5	35,8	30,8	27,5
Economic savings	35,7	33,7	30,7	27,3
Ease of compilation and reading	34,3	35,4	30,4	27,9
Improving customer service	36,7	34,0	29,2	25,4
Less chance of making mistakes	37,9	35,4	26,7	26,2
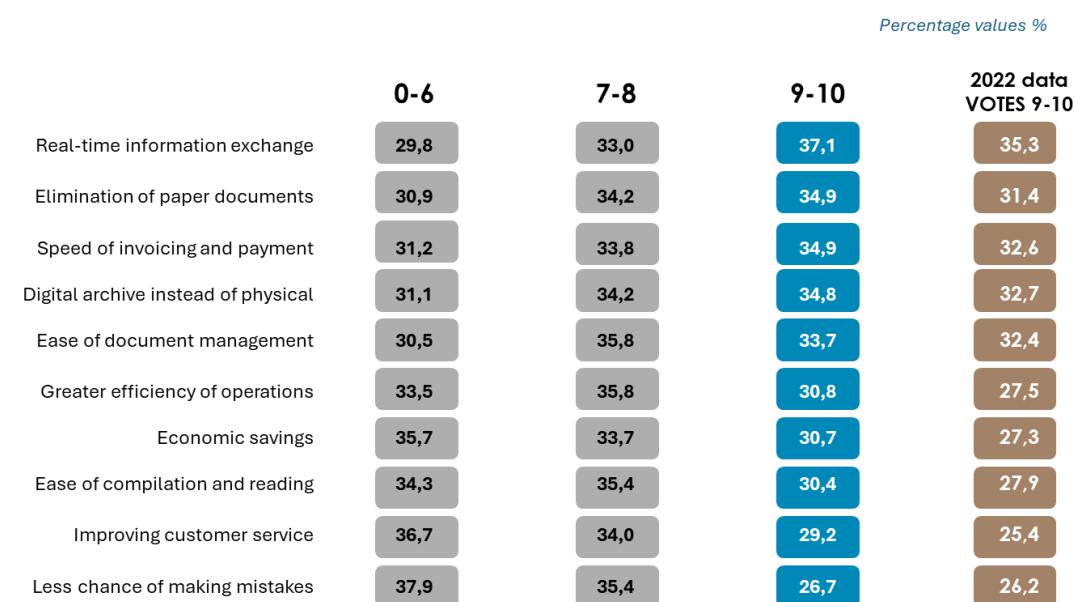
Sample base: 1,611 cases. Data are reported as a universe.

Figure 15: Transport 2025-2022 - Electronic documents recognized advantages

One of the most subtle yet decisive transformations concerns the driver: a functional figure who, in the new digital ecosystem, is positioned as an active hub of the information infrastructure. By 2025, 82.3% of drivers will use an Android smartphone as a "work" device, while 80,4% are permanently connected while traveling. Digital applications used on the move focus on navigation (79,3%) but also include document management

(36,2%), delivery tracking (21,5%), and photographic evidence collection. The presence of on-board units (65,7%) completes the picture of a connected fleet. This widespread digitalization represents a qualitative leap: the driver is no longer a passive terminal, but an informed actor empowered to manage data in real time. This opens up new perspectives in terms of control, safety, and logistics optimization.

Given an application, which device does the driver use?

	Mobile device	On-board unit
GPS Navigation	71,3%	28,7%
Manage documentation	61,9%	38,1%
Track & Trace	47,1%	52,9%
Other	42,9%	57,1%

READING GUIDE

71,3% of drivers who **have the choice between using mobile devices or the on-board unit** for GPS navigation choose to use the mobile device.
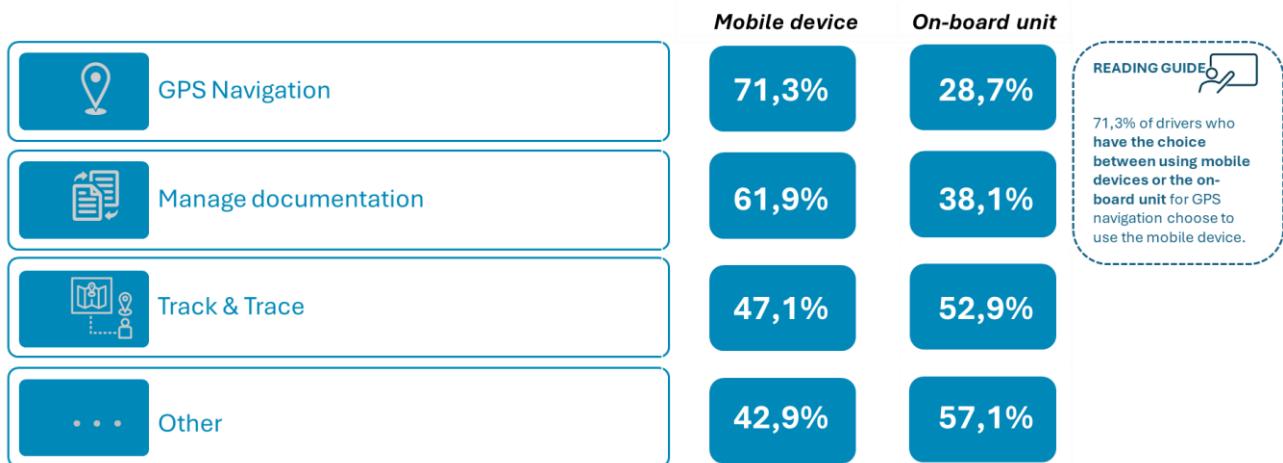
Sample base: 643 cases. Only companies that reported that their drivers use digital work applications on the on-board unit and the device. The data are reported as a whole. The sum of the responses is greater than 100% as multiple responses are permitted.

Figure 16: Transport 2025-2022 - Driver's preferred device per application

The dematerialization of the CMR represents a crucial test case. In 2025, despite the increased use of digital tools (from 20% to 35% for PC-based compilation), 65% of companies still draft the CMR by hand (Figure 17). Paper, here, persists due to inertia, but also due to a lack of standardization and constraints in processes shared with counterparties.

= 2022 data

Does your company complete the CMR (filling out fields 1 to 15)?

28,9 % No*   30,7%

43,7 % Yes   69,3%

27,4 % Just some of these fields

* the counterparty completes it

(If the company fills out the CMR)
How is the CMR filled out?

64,8 % By hand on the pre-printed   79,9%

35,2 % Compiling on PC   20,1%
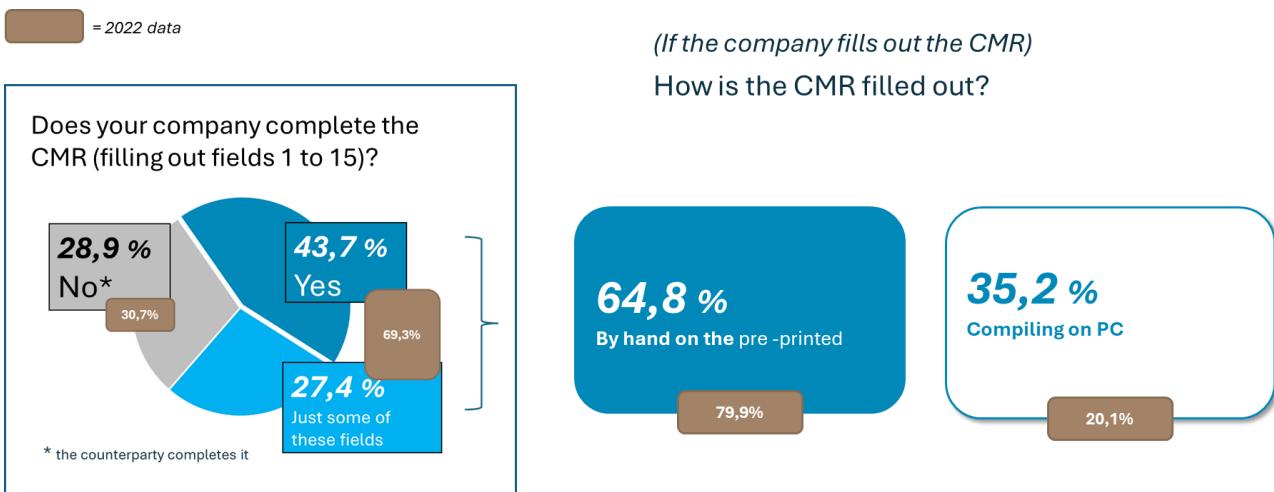
Sample base: 353 cases. Only companies that declared they have a CMR in place. Data are reported as a percentage of the total.

Figure 17: Transport 2025-2022 - Who completes the CMR (fields from 1 to 15)

The e-CMR, the electronic version of the consignment note, is known to a growing share of companies (46,7% vs. 45,3% in 2022), but actual adoption is still low (11,3% versus 1,2% in 2022).
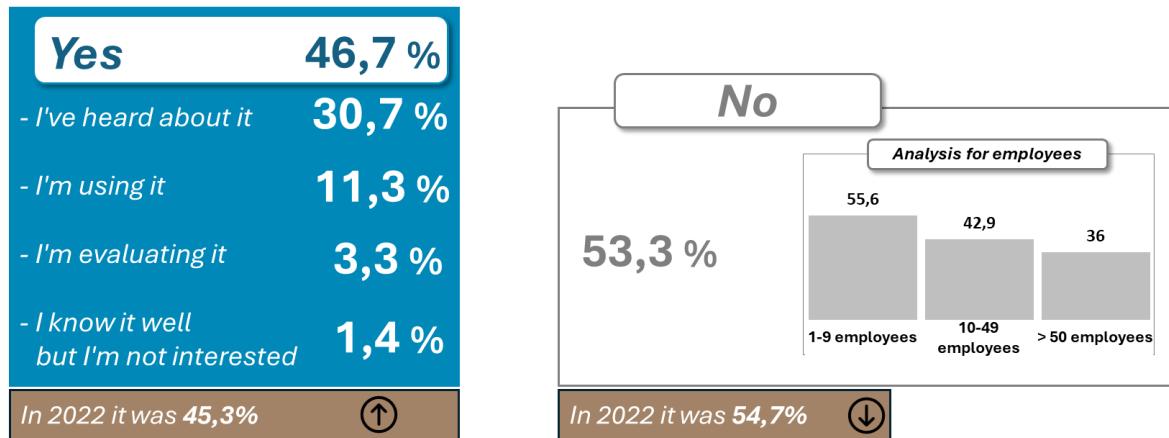
Do you know e-CMR (electronic consignment note)?

Figure 18: Transport 2025-2022 - e-CMR knowledge

Only 29% consider it a priority, compared to 50% who recognize its potential utility (Figure 19. The problem is not (only) technical, but regulatory and cultural: companies complain about critical issues with driver availability, compatibility with regulatory authorities, and the fragmentation of platforms.
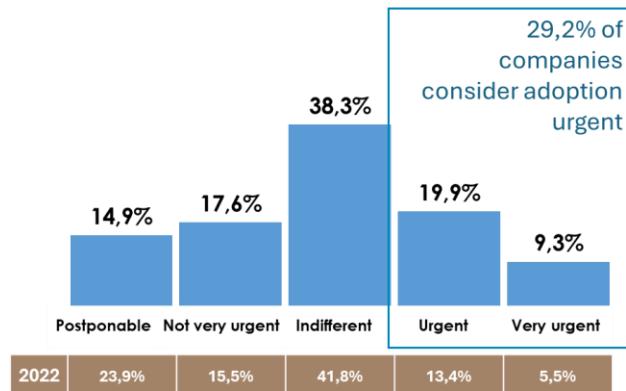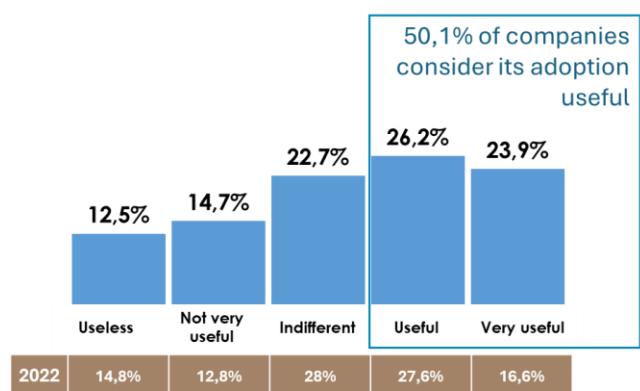
Figure 19: Transport 2025-2022 - Urgency and usefulness of e-CMR

Regarding obstacles to e-CMR adoption, the most perceived challenges for companies concern drivers' ability and willingness to use e-CMR (although the level of awareness is lower than in 2022) and interactions with government platforms. Costs, on the other hand, are less of a concern.

How critical do you consider (from 0: least critical to 10: most critical) the following factors to be in relation to the adoption of e-CMR for your company?
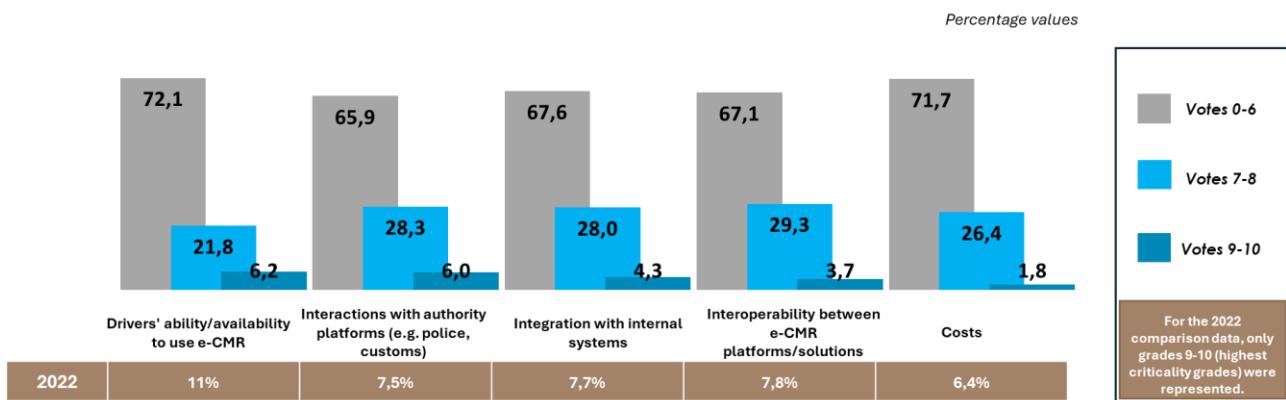
Figure 20: Transport 2025-2022 - Issues perceived as most critical to the adoption of e-CMR

Regulatory awareness represents the true systemic weakness:

- The European eFTI Regulation, which will require public administrations to accept data in electronic format starting in 2027, is known to only 6,4% of businesses while 93% are unaware of its existence or its implications.
- Although Italy has signed the international addendum on the e-CMR, a mismatch persists between legal possibility and daily practice: 76.3% know that Italy has adopted the e-CMR but almost 9.6% of them think that there are limitations in its use.

Where regulatory awareness is lacking, technological adoption is also slowed. Only 39,9% of businesses would favor a possible obligation for electronic documentation in transport, down from 48% in 2022.

The mechanism that the Public Administration should implement to support the use of electronic transport documentation is the activation of public funding (37.4%), followed by regulatory simplification (36%) and dissemination and awareness (33.4%): the demand for public policymakers is clear (Figure 21).

What lever can be used by the Public Administration to support the use of transport documentation in electronic format?
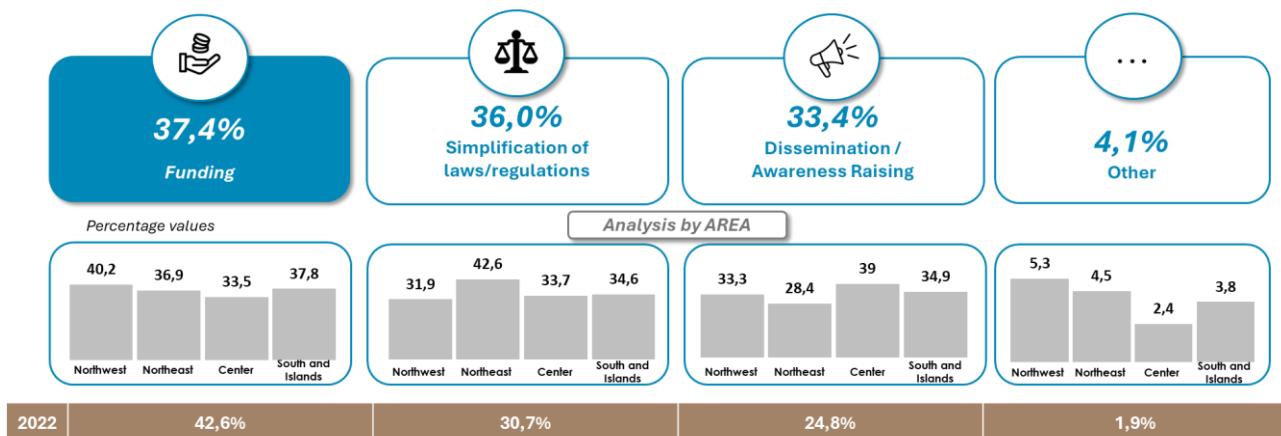
Figure 21: Transport 2025-2022 - How to support the e-CMR adoption

Final comments

The 2022–2025 comparison presents a dynamic picture, one of tangible progress but also persistent resistance. Digitalization is advancing, but not linearly: it is more easily achieved where economies of scale exist, trained human capital, and a long-term managerial vision exist. The next three years will be decisive. The full implementation of the e-CMR, the entry into force the eFTI regulations, and the requirement for interoperability between public and private systems represent a critical threshold, beyond which digitalization will no longer be optional but systemic. Only those who manage the regulatory and technological complexity will be able to access the economic and operational benefits of a truly integrated logistics system. On the other hand, inertia risks accentuating the competitive marginalization of those companies that fail to transform innovation into routine.

6.4.2 Survey 2025: Transport and manufacturing companies - comparative insights

The comparative analysis of manufacturing and transportation companies paints a complex but highly informative picture of the different evolutionary trajectories the two sectors are pursuing in terms of digitalization and the adoption of innovative tools for document and information management. While the transportation sector displays higher levels of operational digitalization with 87,8% of companies reporting having at least digitalized processes (Figure 22), manufacturing stands out for its more mature penetration of administrative processes, where 37% of companies have achieved full digitalization, compared to 28,1% in the transportation sector (Figure 23). This gap highlights two distinct approaches: transportation is digitalizing for contingent needs and logistics, while manufacturing is pursuing a more profound and strategic transformation, also driven by the need for integration into international supply chains.

How digital are your <u>operational processes</u> (freight operations, warehouse logistics, etc.)?
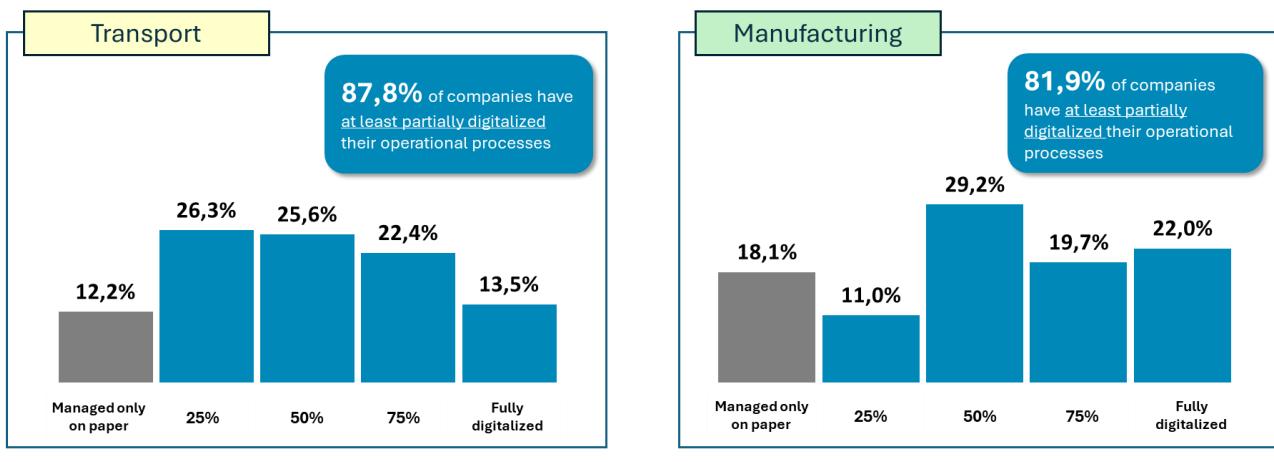

Figure 22: Transport-Manufacturing 2025 - Digitalization of operational processes

How digital are your <u>administrative processes</u> (order management, invoicing, etc.)?
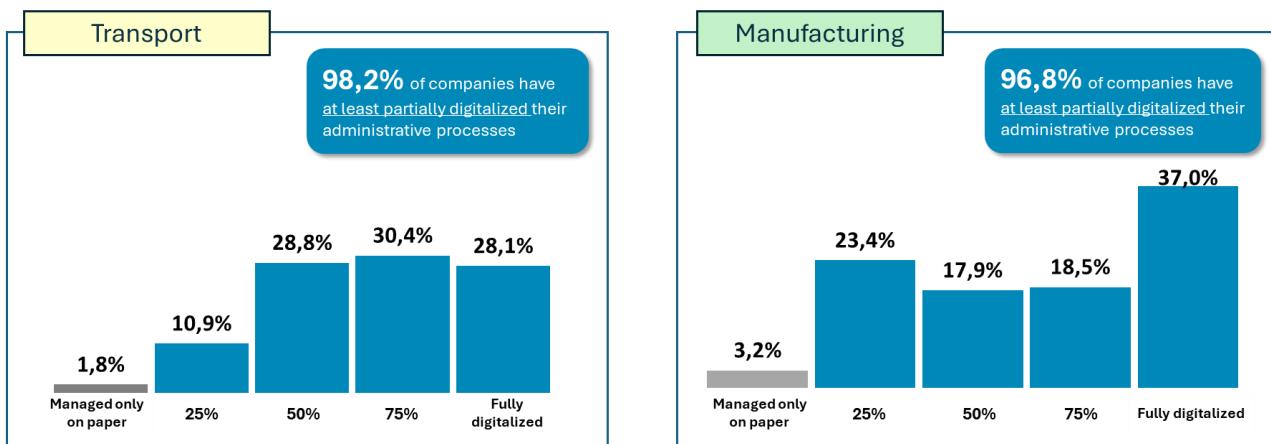
Transport

98,2% of companies have at least partially digitalized their administrative processes

	1,8%	10,9%	28,8%	30,4%	28,1%
	Managed only on paper	25%	50%	75%	Fully digitalized

Sample base: 1,611 cases. Data are reported as a universe.

Manufacturing

96,8% of companies have at least partially digitalized their administrative processes

	3,2%	23,4%	17,9%	18,5%	37,0%
	Managed only on paper	25%	50%	75%	Fully digitalized

Sample base: 508 cases. Data are reported as a universe.

Figure 23: Transport-Manufacturing 2025 - Digitalization of administrative processes

Interestingly, the convergence **on communication methods still centered on email** signals an intermediate level of relational digitalization and resistance to automation through portals and EDI systems.

How do you communicate with customers/suppliers?

Mode	Transport	Manufacturing
In paper form	13,1%	14,1%
By email	98%	94,1%
Direct interface of customer/supplier IT environments	15,7%	15,2%
Other	1,6%	8,4%

Sample base: 1,611 cases for the TRANSPORT sample and 508 cases for the MANUFACTURING sample.

The data are reported as a universe.

The sum of the responses is greater than 100% as multiple responses are permitted.

Figure 24: Transport-Manufacturing 2025 - Communications methods

However, it is in the area of electronic documents and the perception of their benefits that the clearest differences emerge: transport companies perceive the advantages of adopting digital documents more strongly, especially in terms of operational speed and real-time exchange, while in manufacturing the strategic value of digitalization appears less internalized (Figure 25).

How advantageous (on a scale of 0 to 10) do you consider the following potential effects of using documents in electronic form?

	Transport	Manufacturing
Real-time information exchange	37,1%	26,7 %
Elimination of paper documents	34,9%	27,8 %
Speed of invoicing and payment	34,9%	25,5 %
Digital archive instead of physical	34,8%	27,9 %
Ease of document management	33,7%	25,8 %
Greater efficiency of operations	30,8%	26,9 %
Economic savings	30,7%	26,5 %
Ease of compilation and reading	30,4%	25,6 %
Improving customer service	29,2%	25,9 %
Less chance of making mistakes	26,7%	24,3 %

Only values 9-10 are considered
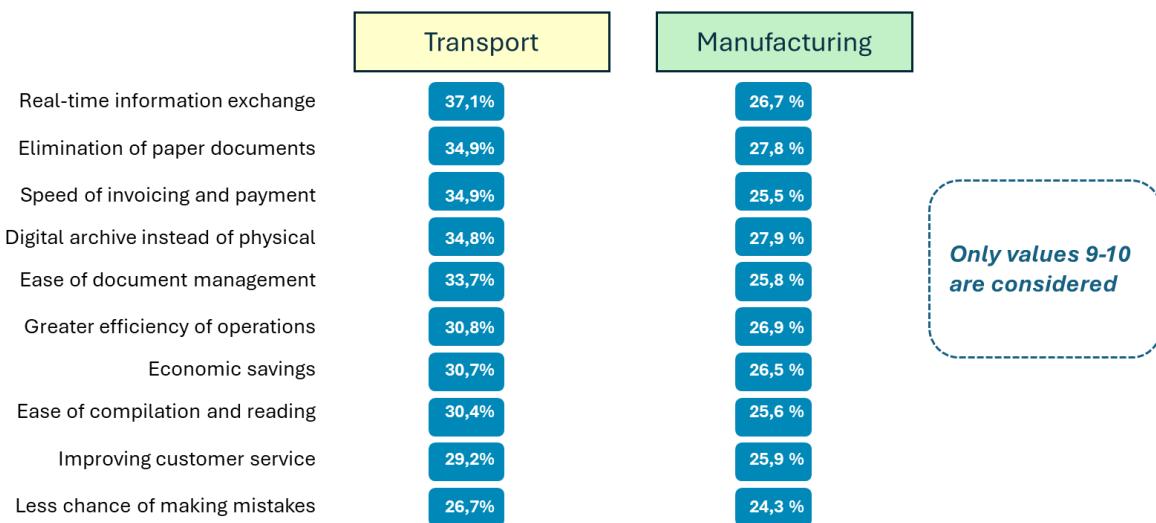
Sample base: 1,611 cases for the TRANSPORT sample and 508 cases for the MANUFACTURING sample.

The data are reported as a universe.

Figure 25: Transport-Manufacturing 2025 - Electronic documents recognized advantages

Interestingly, although completing fields 1 to 15 of the CMR is the sender's responsibility, manufacturing companies tend to delegate this task to their counterparts (70.4%). Therefore, most transport companies also complete some fields that fall under the sender's responsibility, demonstrating greater operational involvement (Figure 26).

Does your company complete the CMR (filling out fields from 1 to 15)?

Transport

28,9 %
No, the other party* completes it

43,7 % Yes

27,4 % Just some of these fields

Sample base: 511 cases. Only transport companies operating internationally.
Data are reported as a universe.

Manufacturing

70,4%
No, the other party* completes it

15,2% Yes

14,4% Just some of these fields

Sample base: 508 cases.
Data are reported as a universe.
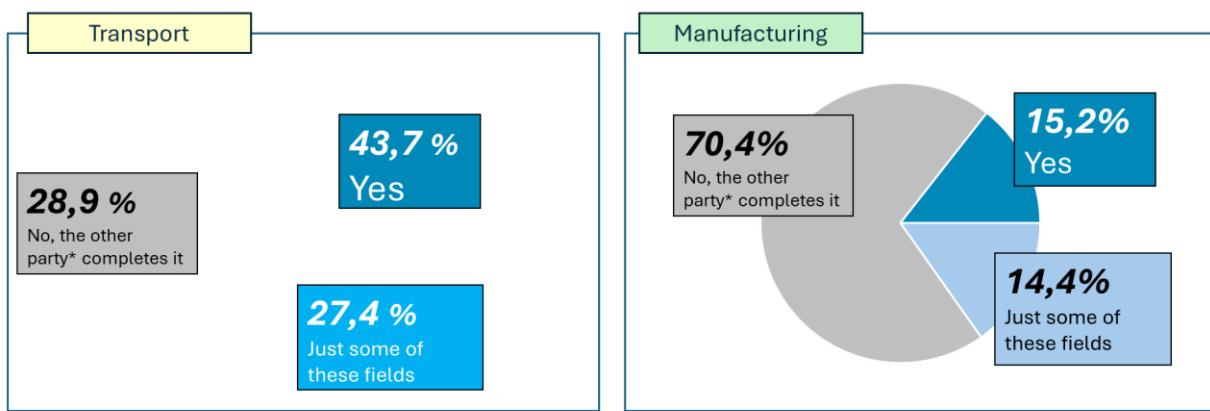
* the counterparty

Figure 26: Transport-Manufacturing 2025 - Who completes the CMR (fields from 1 to 15)

In terms of knowledge and adoption of the e-CMR, greater conceptual familiarity emerges in the transport sector, but a slightly higher rate of use in manufacturing (**12,9% versus 11,3%**), confirming the greater ability **to move from awareness to implementation**.

Do you know e-CMR (electronic consignment note)?

Transport	
Yes	**46,7** %
Of which... - *I've heard about it.*	**30,7** %
- *I'm using it*	**11,3** %
- *I'm evaluating it*	**3,3** %
- *I know him well but I'm not interested*	**1,4** %
No	**53,2** %

Sample base: 511 cases.
Only transport companies operating internationally.
Data are reported as a universe.

Manufacturing	
Yes	**36,6** %
Of which... - *I've heard about it.*	**17,9** %
- *I'm using it*	**12,9** %
- *I'm evaluating it*	**4,2** %
- *I know him well but I'm not interested*	**1,6** %
No	**63,4** %

Sample base: 508 cases.
Data are reported as a universe.

Figure 27: Transport-Manufacturing 2025 - e-CMR knowledge

The information sources are clearly distinct: the internet dominates for transport, while in manufacturing, customers and suppliers represent the main lever for dissemination, underlining a more relational and integrated approach in the latter case.

From whom or where did you get the information?

Transport		Manufacturing
53,3	From the Internet	29,1
26,7	From Customers/Suppliers	40,9
26,1	From the Associations	24,2
17,4	From the trade press	1,9
4,7	From the Government	8,1
0,3	Other	5,7
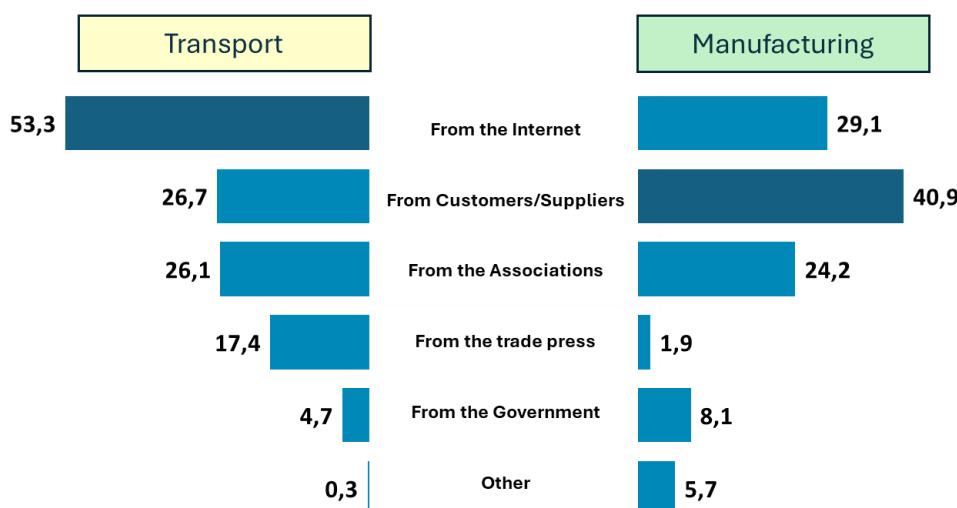
Sample base: 268 cases for the transportation sample and 172 cases for the manufacturing sample. Only those familiar with the e-CMR were included.
The data are reported as a universe.
The sum of the responses is greater than 100% as multiple responses are permitted.

Figure 28: Transport-Manufacturing 2025 - Information sources for the e-CMR

Furthermore, manufacturing companies show greater openness towards the e-CMR, with 67,9% recognizing its usefulness and 51,3% perceiving its urgency, compared to decidedly lower values in transport (50,1% and 29,9% respectively), where indifference and postponement prevail (Figure 29 and Figure 30).

How useful do you consider the adoption of e-CMR for your company (with a view to having a positive impact)?
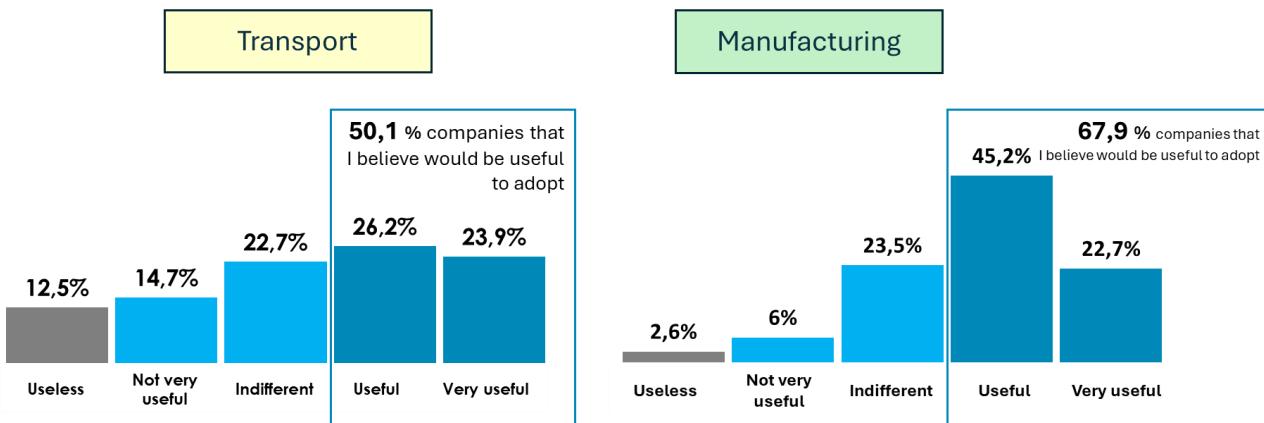
Transport

50,1 % companies that I believe would be useful to adopt

| 12,5% | 14,7% | 22,7% | 26,2% | 23,9% |
| Useless | Not very useful | Indifferent | Useful | Very useful |

Sample base: 511 cases. Only companies involved in international transport. Data are reported as a universe.

Manufacturing

67,9 % companies that I believe would be useful to adopt

| 2,6% | 6% | 23,5% | 45,2% | 22,7% |
| Useless | Not very useful | Indifferent | Useful | Very useful |

Sample base: 508 cases. Data are reported as a universe.

Note: *Among companies unfamiliar with e-CMR, opinions were gathered following a prompt explaining what "e-CMR" means.*

Figure 29: Transport-Manufacturing 2025 - e-CMR usefulness

How urgent do you consider the adoption of e-CMR for your company (how much of a priority is e-CMR)?
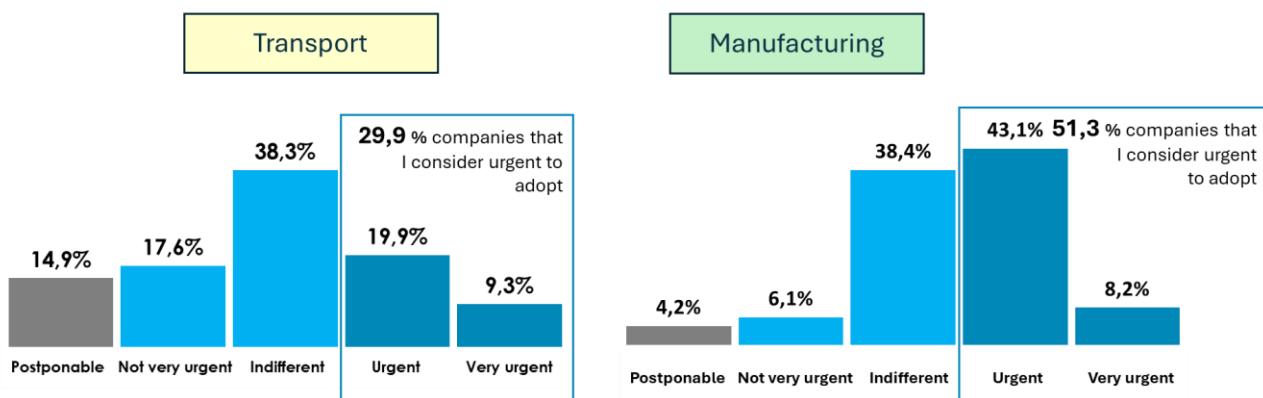
Transport

29,9 % companies that I consider urgent to adopt

| 14,9% | 17,6% | 38,3% | 19,9% | 9,3% |
| Postponable | Not very urgent | Indifferent | Urgent | Very urgent |

Sample base: 511 cases. Only companies involved in international transport. Data are reported as a universe.

Manufacturing

51,3 % companies that I consider urgent to adopt

| 4,2% | 6,1% | 38,4% | 43,1% | 8,2% |
| Postponable | Not very urgent | Indifferent | Urgent | Very urgent |

Sample base: 508 cases. Data are reported as a universe.

Note: *Among companies unfamiliar with e-CMR, opinions were gathered following a prompt explaining what "e-CMR" means.*

Figure 30: Transport-Manufacturing 2025 - e-CMR urgency

However, both sectors are optimistic about the positive economic impact of adopting e-CMR (Figure 31), with a large majority expecting a cost of less than 1 euro per document, although this expectation may underestimate the initial implementation costs (Figure 32).

How advantageous (from 0 to 10) do you consider the following potential effects of using e-CMR for your company?

	Transport	Manufacturing
Digital archive instead of physical	32,8%	15,0%
Ease of exchanging documents (in addition to the CMR, also photos and attachments)	27,6%	15,0%
No risk of losing past CMRs	25,2%	19,3%
document **recovery**	24,2%	15,6%
Speed of invoicing and payment settlement thanks to real-time proof of delivery	23,0%	20,4%
Enhanced Customer Service through Real-Time Management	22,8%	17,4%
Ease of reading thanks to the absence of handwritten parts	22,4%	16,6%
Reduction of administrative burdens for the driver	21,2%	17,8%
Process automation (e.g. opening barriers/security gates)	20,9%	16,4%
Elimination of paper CMR	19,7%	26,3%
Facilitating inspection and control processes	19,6%	17,7%
Collaboration between the various actors in the process in real time	17,9%	16,2%
Ease of creation and distribution of the e-CMR to drivers	15,0%	16,0%
Controlled compilation (absence of redundant data)	14,3%	17,7%

Only values 9-10 are considered

Sample base: 511 cases for the TRANSPORT sample and 508 cases for the MANUFACTURING sample.
The data are reported as a universe.
The sum of the responses is greater than 100% as multiple responses are permitted.

Figure 31: Transport-Manufacturing 2025 - e-CMR perceived benefits

How much do you expect to pay for using and managing the electronic consignment note?
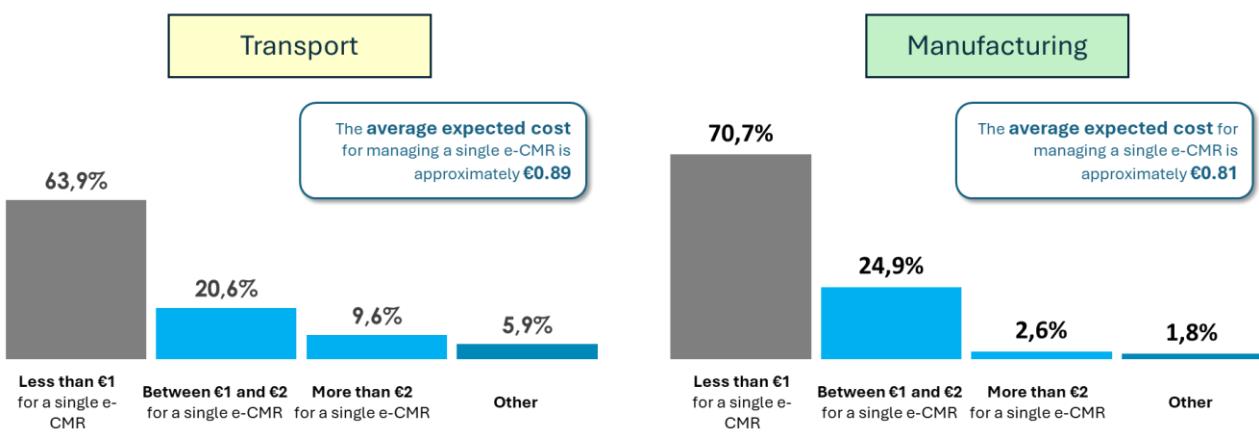
Transport

The **average expected cost** for managing a single e-CMR is approximately **€0.89**

- Less than €1 for a single e-CMR: 63,9%
- Between €1 and €2 for a single e-CMR: 20,6%
- More than €2 for a single e-CMR: 9,6%
- Other: 5,9%

Sample base: 511 cases. Only companies involved in international transport.
Data are reported as a universe.

Manufacturing

The **average expected cost** for managing a single e-CMR is approximately **€0.81**

- Less than €1 for a single e-CMR: 70,7%
- Between €1 and €2 for a single e-CMR: 24,9%
- More than €2 for a single e-CMR: 2,6%
- Other: 1,8%

Sample base: 508 cases.
Data are reported as a universe.

Figure 32: Transport-Manufacturing 2025 - e-CMR expected cost

A further point for reflection is the level of regulatory awareness. Both sectors demonstrate a good level of awareness regarding the applicability of the e-CMR in Italy, but significant gaps remain, especially regarding

knowledge of the eFTI addendum and the mandatory timeframes for compliance by public administrations. Extremely limited knowledge of the eFTI regulation is observed (over 80% of companies are unaware of it), with clear impacts on companies' ability to plan digital compliance in advance (Figure 33).
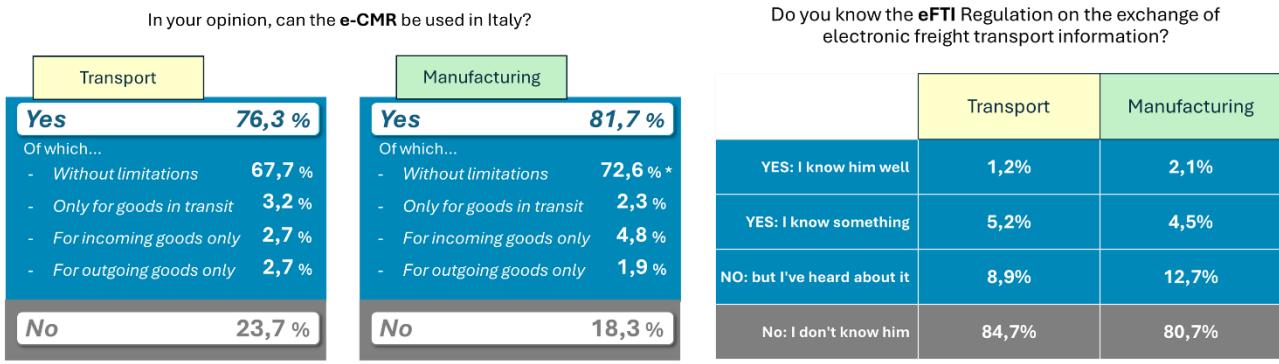

Figure 33: Transport-Manufacturing 2025 - e-CMR and eFTI knowledge

As far as the usefulness to extend the eFTI (electronic document and information exchange) logic to national transport (for example, to the DdT) both sectors are quite lukewarm, 39,8% transport and 32,1% manufacturing (Figure 34).
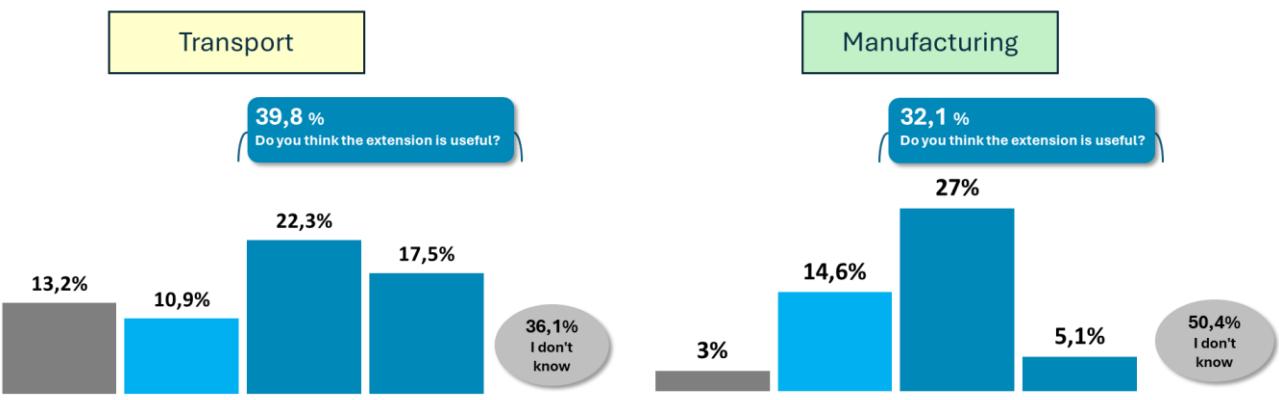
Figure 34: Transport-Manufacturing 2025 - eFTI logic also at national level

Finally, manufacturing stands out for its greater optimism regarding a future complete replacement of paper with digital (36,7% versus approximately 25% in transport), while the transport sector appears more inclined to hypothesize a coexistence of the two formats, confirming a more conservative stance (Figure 35).

Do you think electronic documentation will replace paper documentation
in the sector in which your company operates?

	Transport	Manufacturing
Yes, completely	**25,6%**	**36,7%**
Yes, partially	**67,7%**	**46,8%**
No, paper documentation will remain the most widespread	**6,7%**	**16,6%**

Sample base: 1,611 cases for the TRANSPORT sample and 508 for the MANUFACTURING sample.
The data are reported as a universe.

Figure 35: Transport-Manufacturing 2025 - Paper documents replacement

Manufacturing companies also show greater openness regarding a possible regulatory requirement to exclusively use electronic formats (50% versus 39,9%), but in both sectors, there is a polarization of opinions, signaling the need for strong, targeted, and sector-specific accompanying and institutional communication policies (Figure 36).

What lever can be used by the Public Administration to support the use of transport documentation in electronic format?

Possible actions	Transport	Manufacturing
Funding	37,4%	50,2%
Simplification of laws/regulations	36%	48,8%
Disclosure/Awareness Raising	33,4%	27,4%
Other	4,1%	5,3%

Sample base: 1,611 cases for the TRANSPORT sample and 508 for the MANUFACTURING sample.
The data are reported as a universe.

Figure 36: Transport-Manufacturing 2025 - How to support the e-CMR adoption

Finally, in the case of the electronic truck (e-TIR), the trends are reversed: transport considers it useful in 38,2% of cases, while manufacturing stands at a modest 17,9%, highlighting an informational and operational gap that still needs to be filled.

How useful do you consider the adoption of e-TIR (electronic TIR) for your company?

Values %

Transport: 38,2%

Manufacturing: 17,9%

Useless	Not very useful	Indifferent	Useful	Very useful	I don't know
8,1 / 5,4	14,4 / 20,2	29,8 / 17,2	22,9 / 8,6	15,3 / 9,3	9,6 / 39,4
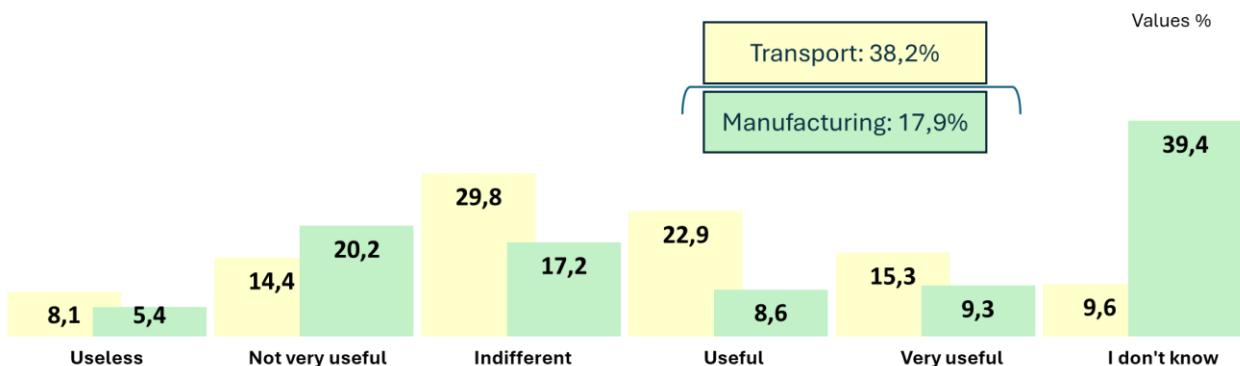
Sample base: 511 cases for the TRANSPORT sample and 508 for the MANUFACTURING sample.
Only companies engaged in international transport.
Data are reported as a universe.

Figure 37: Transport-Manufacturing 2025 - Usefulness of adopting e-TIR for the company

Final comments

Overall, the analysis highlights two sectors with different priorities, differentiated skills, and asymmetrical levels of digital maturity. Manufacturing is moving toward structural and systemic digitalization, while transportation is adopting digital tools more for operational needs than for strategic vision.

This suggests the opportunity, from a macroeconomic perspective, to develop tailor- made public and industrial policies capable of supporting digitalization based on each sector's level of readiness, taking into account the specific barriers and motivational drivers that drive them.

6.5   Communication activity

Communication was a strategic pillar throughout the e-CMR project development, playing a decisive role in ensuring Project visibility, stakeholders' participation, and the dissemination of results.

An integrated, coherent and multi-channels communication strategy was developed and implemented to support all operational phases with targeted actions.

In particular, the following activities were realized:

i)   **Restyling of the "ecmritaly.it" website** (Figure 38)**,** developed as part of the project "Towards the implementation of the e-CMR system in Italy,", to include both projects under the "e-CMR Italy" logo and to improve both accessibility and content organization, with special attention to user-friendliness for end users. This update played a crucial role in ensuring timely updates of project information, in alignment with regulatory developments and the progress of project activities.

More in detail, the intervention included:

✓   The creation of a new thematic label dedicated to the project *"Paving the way for the digitalization of the road transport documentation in Italy"*, structured into three sub-labels: **"awareness-raising"**, **"survey"**, and **"results"**, designed to guide users through the project's various phases and objectives.

✓   The introduction of a dedicated **"Events"** label, linked to an interactive calendar and a summary list of meetings/webinars related to the first and second informational/training phases. This

feature was designed to help users navigate and keep track of ongoing and upcoming project activities.

✓ The enhancement of the information architecture to include a dedicated section for managing informational **pop-ups** to draw users' attention to upcoming events, news, or featured content through a discreet yet effective display mode.
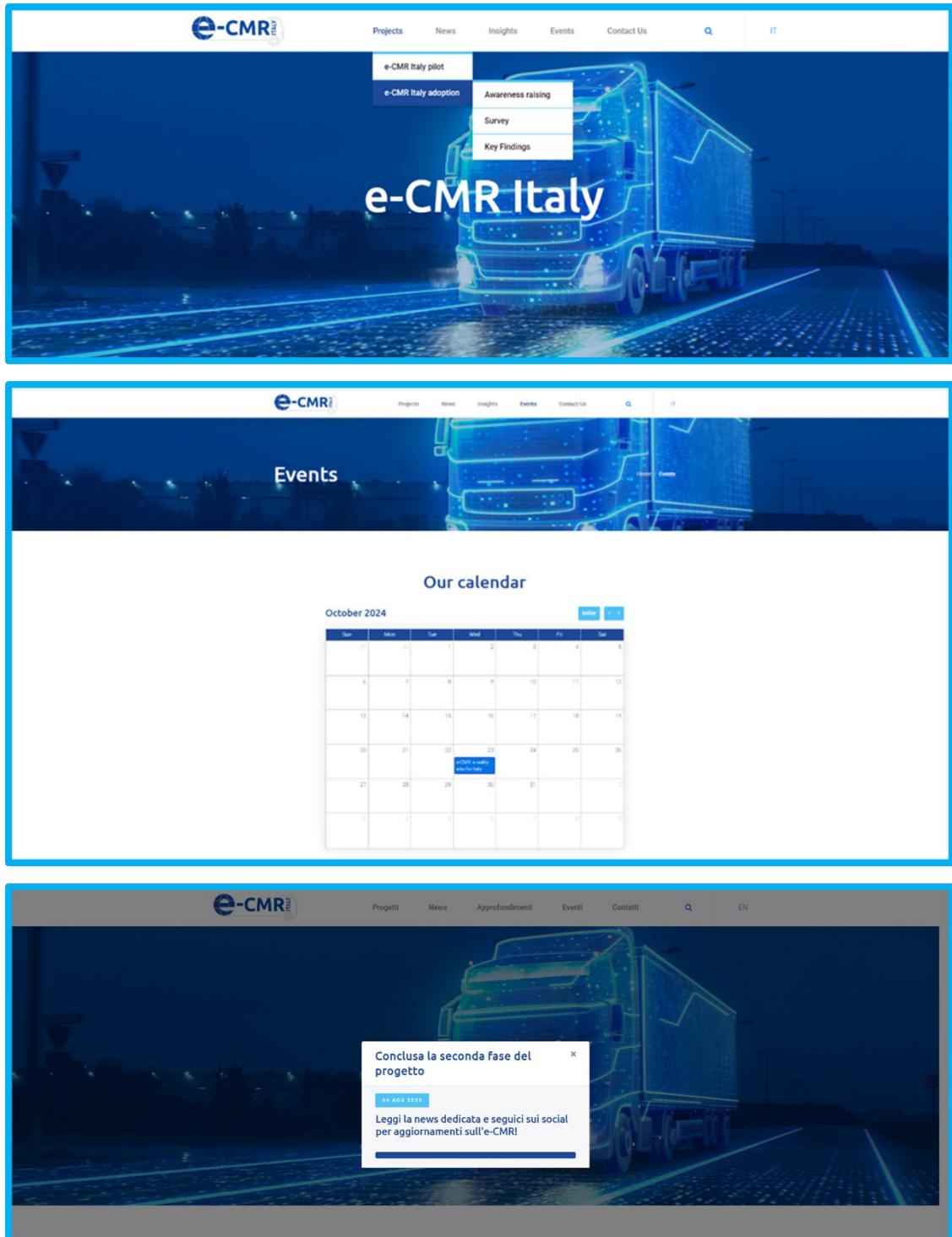
Figure 38: Restyling of the "ecmritaly.it" website

ii) Creation of a **custom logo/background** for the webinars to strength the project's brand image and to convey a sense of professionalism and continuity to the audience.

Figure 39: Webinar chairman custom logo/background

iii) **Design and implementation of a coordinated set of operational and communication activities for the nine webinars,** each with specific characteristics, target audiences, and objectives, such as:

✓ Creation and management of virtual rooms, with clearly defined technical and operational roles (host, co-host, control room).

✓ Organization of technical support and event coordination, both in the preparatory phase (technical tests with speakers, coordination briefings) and during the live sessions (access management, chat moderation, live stream supervision).

✓ Production and distribution of pre-event materials, such as graphic invitations, reminder emails, and short operational guides for participants.

✓ Follow-up activities, including the preparation of FAQs and the distribution of materials (slides).

This structured set of actions ensured high quality standards throughout the webinars, supporting active participation and interaction between speakers and attendees, and reinforcing the project's image as a space for professional dialogue and knowledge sharing.

iv) **Setting up a dedicated contact e-mail address ("ecmritaly@uniontrasporti.it")** continuously monitored to manage the high volume of incoming inquiries. Interactions mainly focused on first-level questions (such as access procedures, registrations, and material requests), but in several cases, they also included more specific second-level queries. These required coordinated responses involving project managers, webinar speakers, and digital solution partners.

v) **Continuous and proactive management of social media channels,** carefully balancing institutional, informative, and promotional content based on a structured editorial plan.

In particular, the **LinkedIn** and **Facebook** pages of Uniontrasporti were used to highlight key project moments, promote webinars, and foster dialogue with the relevant community. The content was published regularly to ensure consistent communication.

From October 2024 to June 2025, **46 project-related posts** were published **on LinkedIn**, including invitations, reminders, in-depth content, and updates on the webinar series and other informational activities carried out during the period.

These posts generated over **15,500 impressions**, indicating a significant level of organic visibility, **991 clicks**, reflecting a good level of active engagement, and **94 shares**, which helped amplify the messages to a wider audience. On average, each post received approximately **338 views and 21 clicks**—metrics which, when viewed in relation to the thematic focus and regular publication, confirm the effectiveness of a content strategy based on specialized, visually consistent, and well-planned posts.

On **Facebook**, a parallel organic campaign was managed, mirroring the content shared on LinkedIn, including invitations, deep dives, updates, and reminders related to the webinar series and other informational activities.

Overall, these posts generated **1,154 impressions**, **29 clicks**, and **128 total interactions** (reactions, comments, and shares). On average, each post reached around **38 views**, with a modest engagement rate—nonetheless aligned with the platform's thematic nature and primarily informational usage.

It is worth noting that although the content was identical across platforms, **organic performance differed**: LinkedIn proved more effective in terms of visibility and activation, due to a more targeted and receptive B2B audience while Facebook played a **complementary role**, contributing to editorial continuity and project recognizability on a previously established channel, albeit with lower engagement returns.

vi) **Publishing of several news** on the "ecmritaly" website to keep stakeholders and interested audiences informed of key project milestones.

Over the course of the Project, **5 news** items were published, which served as a coherent narrative thread to accompany the Project's development, promoting transparency and the dissemination of its results. In particular, the **joint press release**, issued by Unioncamere and Uniontrasporti **in September 2024,** highlighted the strategic role of the Project in the digitalization of logistics and served as a launchpad for awareness-raising efforts, promoting the first informational webinars on the management and use of e-CMR.

The Project's intensive communication activity also **attracted the attention of trade media**, which contacted the team to produce editorial features, both in the form of **articles** and **interviews**. These contributions helped expand the project's communication reach and positioned it as a reference point in the process of digitalizing freight transport by road.

vii) **Design and implementation of e-mail campaigns** targeted specific audiences e.g., institutional stakeholders, industry operators, project partners, with particular attention to promoting webinars.

Moreover, periodic meetings were organized with the trade associations, partners of the Project, to transparently share the progress, key outputs, and upcoming steps reinforcing the collaboration among stakeholders.

Starting in spring 2025, contacts have been established with MIT for a possible presentation of the project's results at a public event planned as part of the eFTI4EU project [4] thus conveying a message of synergy between the two projects. Participation in this event would have thus constituted the final event planned for the project. Unfortunately, the eFTI4EU event initially scheduled for June has been postponed to the end of

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[4] MIT is one of the Partners of this project funded under the Connecting Europe Facility (CEF) program of the European Commission

the year. In any case, discussions with MIT will continue even after the project's closure in order to seize this opportunity.

In summary, the activities realized in the communication action made the "paving the way for the digitalization of the road transport documentation in Italy" project not only more accessible and understandable, but also more engaging and widely shared building a solid foundation for future dissemination and advocacy efforts along the journey for the digitalization of road freight transport documents in Italy.

Date	Title (Italian)	Title (English)
July 29, 2024	Adesione dell'Italia al Protocollo e-CMR	Italy's Accession to the e-CMR Protocol
September 25, 2024	Trasporto stradale merci: operativa la digitalizzazione delle lettere di vettura elettroniche (e-CMR)	Road freight: digitization of electronic waybills (e-CMR) operational
February 11, 2025	e-CMR Italy – Concluso il primo ciclo di webinar e-CMR: al via la seconda fase	e-CMR Italy – The first cycle of e-CMR webinars has concluded: the second phase begins!
June 30, 2025	Incontri con i fornitori di soluzioni e-CMR: conclusa la seconda fase del progetto "Paving the way for the digitalization of road transport documentation in Italy"	e-CMR solution providers meetings: second phase of the "Paving the way for the digitalization of road transport documentation in Italy" project completed

Table 3: News published on "ecmritaly" website

7 Conclusions

The project "Paving the way for the digitalization of the road transport documentation in Italy" has achieved important results in terms of awareness-raising, stakeholder engagement, and dissemination of information.

Thanks to a wide-reaching communication campaign, targeted meetings between demand and supply of digital solutions, and a constant dialogue with the main trade associations, the project has contributed to increasing awareness on the digitalization of transport documents and, in particular, on the e-CMR. The data collected confirm a growing interest among Italian companies, although several technical, organizational, and regulatory barriers still need to be addressed.

The survey shows that companies are broadly interested in digital solutions for transport documentation, but effective adoption, especially among micro and small enterprises, will require concrete support.

But manufacturing (sender) and transport (carrier) companies have different priorities, differentiated skills, and asymmetrical levels of digital maturity. Manufacturing is moving toward structural and systemic digitalization, while transportation is adopting digital tools more for operational needs than for strategic vision.

This suggests the opportunity, from a macroeconomic perspective, to develop tailor- made public and industrial policies capable of supporting digitalization based on each sector's level of readiness, taking into account the specific barriers and motivational drivers that drive them.

With Italy's ratification of the Additional Protocol and the forthcoming implementation of the eFTI Regulation, the conditions are now in place for a stronger acceleration of the digital transition in Italy.

But the digital transition of transport documentation is a structural process that requires continuity, coordination, and appropriate tools. In this context, Unioncamere, Uniontrasporti, and the network of PID (Digital Business Points) of the Chambers of Commerce will be able to organize further information and training initiatives for MSMEs involved using their own resources.

8 Annexes

8.1 Supply-demand meeting: rules

The following rules have been established for the organization and management of "supply and demand matching" webinars:

a) Webinar mode;

b) Uniontrasporti will provide the webinar platform: zoom meeting;

c) Each webinar is dedicated to a single supplier (e-CMR solution);

d) Period: February-May 2025;

e) Webinar duration: 1 hour (indicative);

f) Webinar language: preferably Italian (alternatively English);

g) The "e-CMR supplier" will use the time as it prefers but the focus of the presentation must be its e-CMR solution;

h) No live Q&A (but the supplier can decide otherwise):

- Questions will be collected (with the indication of the questioner) by Uniontrasporti and sent to the e-CMR supplier who will decide whether to answer or not;

i) The date of the webinar will be agreed with the e-CMR solution supplier at least 30 days in advance;

l) The webinar will be promoted via the "ecmritaly" website and Uniontrasporti social media channels;

m) The "ecmritaly" website will be the "channel" for webinar participants registration;

n) A registration request will be approved automatically: no filter will be placed on registration request;

o) In the registration request, each applicant must expressly indicate whether he/she allows the transmission of his/her data to the supplier of the e-CMR solution presented in the webinar:

- Uniontrasporti will communicate to the e-CMR supplier the data of the webinar participants who have given their authorization;

p) The "e-CMR supplier" will decide whether to authorize or not:

- The distribution of the material presented to the participants (this will be done via email from the address ecmritaly@uniontrasporti.it);
- The publication of the material on the "ecmritaly" website;

q) Each party (e-CMR supplier, Unioncamere/Uniontrasporti) will bear the costs it will incur for the organization and implementation of the webinar.