

【欧州】【Common, 海事】

Common - COVID-19 pandemic/Maritime Issues: EMSA publishes report on the COVID-19 pandemic's impact on the EU's shipping industry

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【概要 : Summary】

The COVID-19 pandemic continues to be a problem in many countries and it still poses a serious health threat to people. Due to the pandemic-related restrictions of the people's free movement it also has a detrimental impact on the transport sector, in particular passenger transport.

In the EU, the first lockdown lasted from mid-March to about June 2020, depending on the Member State. It had wide-ranging impacts on all modes of transport, as Member States also closed their borders to other EU Member States in the Schengen area. The restrictions for non-essential travels led to a strong decrease in the movement of people. This was especially observed in the aviation sector, but it also hit other transport modes and the negative impact of travel restrictions prevailed during the rest of the year, as there has been introduced a second lock down in almost all EU Member States, which again impedes the free movement of people within the EU and beyond. Regarding maritime transport, it has been and continues to be affected by the travel restrictions as the Covid-19 pandemic continues. Since the beginning of the Covid-19 pandemic in Europe, the European Commission, the Member States and the shipping industry have been taking measures to ensure the continuity of operations but the

European Maritime Safety Agency (EMSA)'s report on the impact of COVID-19 pandemic on the shipping industry underlines that in particular the maritime transport for passenger continues to suffer of the continuation of the restrictions in the free movement of people in the EU.

Therefore, the main focus of this article will be on showing the trends in maritime passenger transport in 2020, based on the analyses of EMSA's report entitled "Covid-19 - Impact on shipping". Based on data collected by the EMSA data basis, the EMSA report demonstrates that the cruise sector and basically the entire maritime transport of passengers has been heavily impacted by the COVID-19 pandemic. Instead, the shipping of cargo shows a less severe impact of the pandemic, as the trade of goods never completely stopped.

【記事 : Article】

1. Background of EMSA's report on Covid-19 pandemic's impact on the shipping industry

Since the World Health Organisation (WHO) declared the COVID-19 disease a pandemic on 11 March 2020, travel restrictions continue to be an important tool to confine the further spread of the SARS-CoV-2 virus. While each EU Member State took individual decisions on when and what activities to should be

locked down, as of 18 March 2020, around 250 million people in Europe were in a first lockdown and non-essential travel was forbidden. This lockdown lasted in most countries until mid-April, but some Member States only ended the lockdown in June 2020. Since new quarantine measures are again introduced, due to the worsening of the pandemic situation, these restrictions of the people's free movement continue to have a detrimental impact on passenger transport in Europe. The closure of the individual EU Member State's internal borders within the Schengen area until June 2020 as well as the continuing restrictions of non-essential travels due to quarantine rules since mid-July 2020 has strongly restricted the free movement of people. The EMSA report analyses the pandemic's impact on maritime transport, including the transport of passengers, in order to assist the definition of the recovery policies and specific measures.

2. The European Commission's measures to support the transport sector during the COVID-19 pandemic

In a reaction on the lockdown measures in almost all EU Member States, the European Commission adopted guidelines on passenger rights in aviation, as this was the sector hit most by the lockdown.

Furthermore, the European Commission presented a package of guidelines and recommendations on 13 May 2020, in order to enable the free movement of people within the EU and across EU Member States' borders under pandemic conditions in general. According to the Commission's communication (C(2020) 3139 final), the EU Member States should take actions in a coordinated and cooperative way. Regarding waterborne passenger transport, countermeasures against a COVID-19 spread by the movement of people needs to be tailored to the type of vessel and character and length of the voyage. The Commission's Communication points out the need to increase the number of vessels and voyages, especially where transport by ferries is essential for reasons of connectivity.

Further measures regarding the maritime transport of passengers and workers are detailed in the Guidelines on protection of health for persons on board ships. (Communication from the Commission Guidelines on protection of health, repatriation and travel arrangements for seafarers, passengers and other persons on board ships (2020/C 119/01, C/2020/3100)).

The EMSA's task is to facilitate sharing of best practices and information. Considering the international nature of shipping, cooperation with non-EU countries and international organisations is essential. Operators and all other entities involved in waterborne transport, including ports, ferry terminals, relevant national authorities, are asked to ensure the obedience of distancing requirements, including by reducing the number of allowed passengers.

Regarding cruise ships, ship operators need to put in place strict procedures to reduce the risk of transmission of SARS-CoV-2 on board and to provide adequate medical care in case of infections.

The gradual restoration of cruise services should be coordinated at EU and international level, taking into account the public health situation in the countries concerned. The Council of the European Union suggested that the maritime transport sector follows EMSA's guidelines and recommendations and those of the European Centre for Disease Prevention and Control (ECDC).

3. EMSA's report on the impact of COVID-19 pandemic on shipping industry

3.1. The EMSA report's basis

Although there is no sufficient statistical material available yet for the entire year 2020, it is clear that in particular the passenger transport has been negatively affected by the COVID-19 pandemic. In the past months, the European Commission, the Member States and the shipping industry have been taking measures to ensure the continuity of operations and thus the security of supply. The EMSA has now published the first

analysis of the pandemic's impact on certain shipping activities in the EU and beyond. The EMSA report entitled "Covid-19 - Impact on shipping", published on 2 October 2020, is based on data collected by the EMSA data basis and provides figures on shipping traffic, vessels movement and port call trends in 2020. Although the EMSA report cannot give an economic impact analysis of the pandemic on shipping due to a lack of available data on the trade volumes, the report analyses vessel traffic data and provides reliable figures on the impact of COVID-19 on shipping traffic. Using data mainly from the EU's Maritime Information and Exchange System (SafeSeaNet), and in certain cases combined with LRIT (Long Range Identification and tracking of ships) among others, EMSA aims at providing figures on the impact of COVID-19 on shipping traffic. The analysis is based on vessel movement statistics including port call trends and EU flagged ships without interpreting the statistical data. The report includes the figures and findings regarding the shipping sector in the EU Member States, EFTA countries (Iceland and Norway) and the United Kingdom. The UK is included in the statistics because in 2019, the UK was still EU Member State and the transition period is due to end of 2020.

According to the report, the on-going COVID-19 pandemic has affected all shipping sectors from passenger ships to container ships and oil tankers. By analysing the pandemic's impact on shipping, the EMSA's aim is to assist the EU, maritime administrations and shipping industry in determining a recovery strategy in order to overcome the pandemic related economic crisis. This analysis can assist the recovery policies and specific measures and is updated regularly.

3.2. Changes of ship calls at EU ports and EU flagged ships worldwide in 2020

Regarding ship calls at EU ports, the EMSA report of 20 November 2020 shows that their number declined at EU ports by 12.8% in the first 46 weeks of 2020

compared to the same period in the previous year. During the first 46 weeks of 2019, there were 792,174 ship calls at EU ports, compared to 690,998 ship calls in 2020.

However, comparing only the same week 46 in 2019 and 2020, the number of ships calls in EU ports only declined by 1%. The most significantly affected sectors have been the Chemical tankers, Cruise ships and Passenger ships. In the weeks 34 to 46, the number of Cruise ship calls per week sank by 86% compared to the year 2019, while the number of passenger ship calls declined by 23% compared to 2019. Instead the number of Bulk carriers, Containerships, General Cargo, Oil tankers, and Ro-Ro cargo vessels had only a small decrease (up to 5%), according to EMSA's report of 20 November 2020.

The significant decrease in the number of ship calls began in week 12 (16-22 March) after the WHO declared the COVID-19 outbreak a pandemic. In general, all EU flagged ship types experienced reductions in calls worldwide since the 2nd half of March. However, cruise ships and passenger ships are the two ship types mostly affected by COVID-19. Every major cruise line in the world suspended departures in March 2020. Some cruise operators decided in August to gradually return to service at reduced capacity. However, in most cases, these are single-nationality cruises calling in at a limited number of ports in their country of origin. Instead, nearly all Cruise ships are in Europe or Asia, as major USA cruise lines are on an operational pause until at least 31 December 2020, bound by the Cruise Lines International Association (CLIA) decision. By comparing the number of ship calls between weeks 27 and 39 reported in 2019 and in 2020, it was found that cruise ships, passenger ships and vehicle carriers are the ship types for which the highest decrease in ship traffic has been detected. The most affected countries are Croatia, Iceland, Slovenia and Spain.

Regarding Cruise ships, the number of ship calls per week dropped in the weeks 27 to 29 in 2020 by -89%

compared to the same period in 2019. The passenger ship calls dropped by -28% compared to the same period in the previous year. This trend appears to be the COVID-19 pandemic and lockdown impact across Europe from mid-March onward.

Comparing the total number of port calls (worldwide) by EU-MS flagged vessels by ship type and week between 2019 and 2020, the Ropax passenger ships calls per week in 2020 between the week 12 to 46 increased by +6%, according to the EMSA report. Similarly, since week 30 the number of port calls worldwide from EU flagged Passenger ships showed an increase in comparison to the same weeks in 2019. This underlines that there was more demand in the segment to travel by car and Ropax and on passenger ships, while avoiding flights where possible during the summer vacation time.

3.3. COVID-19 pandemic's impact on the Passenger ships' traffic

Regarding Ro-Ro/Passenger ships' calls at EU ports, in the first 39 weeks of 2019, there were 210,402 ship calls at EU ports and in the same period of 2020 there were 187,507 calls. Therefore, the number of ships calls by Ro-Ro/Passenger ships decreased by -10.9% in comparison with 2019. Regarding calls of passenger ships in EU ports, the calls decreased by -23% in 2020 compared to the year 2019 in the weeks 34 to 46. However, considering the persons on board (PoB), which includes passengers and crew, regarding on board of Ro-Ro/ Passenger ships, the number increased in particular in the weeks after week 20, with a peak in the weeks 33 and 34.

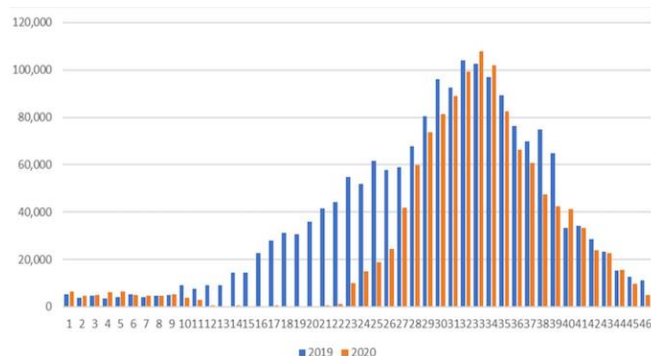


Figure 1: Persons on Board of passenger ships, week

1-46 in 2020

Source: <http://www.emsa.europa.eu/news-a-press-centre/covid19-impact/item/4073-november-2020-covid-19-impact-on-shipping-report.html>, p. 16

Regarding the PoB ("persons on board") of passenger ships, in weeks 33 and 34, there was an even higher number of PoB visible in 2020 than in the same weeks in 2019 (fig. 1). Persons on Board of passenger ships rose since week 22, and the PoB numbers increased quickly until they peaked in the week 33 and 34. Thereafter, the number of PoB sank again and remain always lower than in the previous year until and including week 46 in 2020, compared to the same weeks in 2019.

Regarding the PoB in case of Ro-Ro/Passenger ships, the numbers for 2020 remained lower than in 2019, with the only exception being in week 1 and 3 in 2020, which was before the COVID-19 pandemic hit Europe.

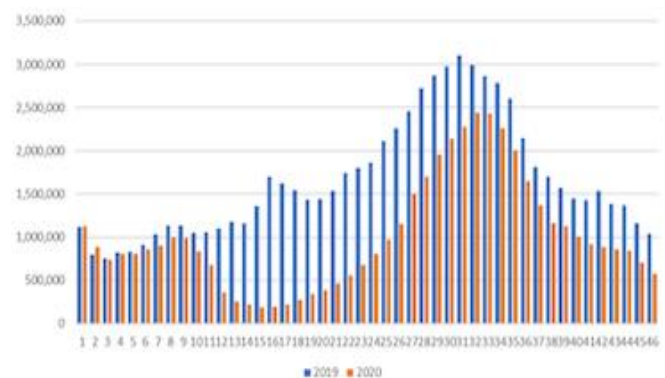


Figure 2: Persons on Board Ro-Ro/Passenger ships, week 1-46 in 2020

Source: <http://www.emsa.europa.eu/news-a-press-centre/covid19-impact/item/4073-november-2020-covid-19-impact-on-shipping-report.html>, p. 16

Regarding cruise ships, in the first 39 weeks of 2019, there were 22,317 calls by cruise ships at EU ports, and in the same period of 2020 there were 3,094 calls. There is a significant decrease visible in the number of Persons on Board (PoB) during week 1-46 in 2020, compared to the same period in 2019. The number of ship calls for cruise ships decreased by -86% in comparison with 2019, in

the first 46 weeks of 2020.

Regarding Cruise ships' calls in EU ports, in the weeks 27 to 39 in 2020, the EMSA report shows a decrease of -89%. In fact, cruise ships had the most significant decrease in ship traffic of all ship types in 2020.

Furthermore, regarding the numbers of PoB after March 2020, the EMSA report shows a significant decrease in the numbers of PoB. The decrease continued and the PoB remained at a very low level, which indicates that the number of PoB of Cruise ships basically corresponds to the number of crew members on board these ships.

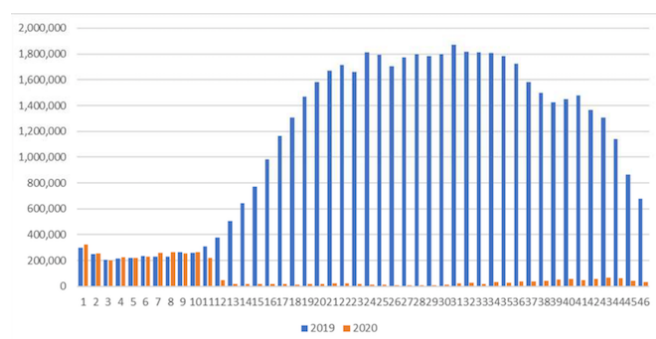


Figure 3: Persons on Board cruise ships, weeks 1-46 in 2020

Source: <http://www.emsa.europa.eu/news-a-press-centre/covid19-impact/item/4030-october-2020-covid-19-impact-on-shipping-report.html>, p. 15

Accordingly, every major cruise line in the world suspended departures in mid-March as the COVID-19 outbreak reached pandemic levels. Over the course of the past months, cruise ship operators almost lost their entire businesses during the COVID-19 pandemic. The Figure 3 clearly demonstrates that the number of PoB decreased abruptly at the beginning of March 2020, around week 10 and 11. Currently, the numbers remain at an extremely low level and basically correspond to crew members on board of these ships.

4. Conclusion

The EMSA report on the impact of the COVID-19

pandemic on ship traffic and shipping in general has shown that Cruise ships and Ro-Ro/Passenger ships are mostly affected by impacts of the COVID-19 pandemic. In fact, large numbers of people in confined spaces like on Cruise ships can make both, passengers and crew, prone to infectious diseases. All the major cruise lines in the world suspended departures since March 2020, when the COVID-19 outbreak hit Europe and the Americas. As the PoB information and the changes in the PoB numbers for different ship types analyses show, the ship type most affected by the pandemic is the Cruise ship type. The COVID-19 outbreak created a high degree of public concern about the approach to health and safety on board cruise ships. Ro-Ro/Passenger ships were less affected, although also in this sector, the impact of the pandemic has become visible. The EMSA will continue to publish updates of the development in the COVID-19 pandemic 's impact on shipping in the following months.

References:

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