

## 【欧州】 【Common, 海事】

### Common - COVID-19 development in transport and tourism/Maritime Issues: EMSA publishes September 2021 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 have an impact on the mobility of people and transport of goods, due to the pandemic-related restrictions. In the EU, the several lockdown periods in 2020 had wide-ranging impacts on the free movement of people and restrictions also continued in the first half of 2021.

The aviation sector suffered of the pandemic' s impact and air traffic was temporarily reduced by about 90%. However, also in other transport modes suffered, as recreational travel was widely restricted by lockdowns or quarantine measures in many EU Member States and beyond.

The COVID-19 pandemic is also affecting the shipping industry and maritime transport. To get an overview of the pandemic' s impact on the shipping industry and maritime transport, the European Maritime Safety Agency (EMSA) is collecting and publishing data on vessel traffic and certain shipping activities. The COVID-19 pandemic reached Europe in spring 2020 and since summer 2020 EMSA reported weekly on the impact of COVID-19 pandemic on the shipping industry, the transport for passengers and goods in the EU and beyond. The objective of the EMSA data collection is to provide figures on the impact of COVID-19 on vessel traffic and shipping

activities, based on data on vessel calls at EU ports and related data on EU flagged ships. Furthermore, there are also statistics about the shipping routes from Europe to China and from Europe to the US, which likewise have been affected by the pandemic. Since January 2021, EMSA publishes monthly reports on the development of the COVID-19 pandemic' s impact on the shipping industry and EMSA' s latest statistics show the development until September 2021. This latest report is of interest as it shows already the results of the movement of travellers during the summer months 2021.

In its report entitled "COVID-19 - Impact on shipping", EMSA reports on the cruise sector, which has been heavily impacted by the COVID-19 pandemic in 2020, and also on the transport with other passenger ships. Especially the cruise industry continues to be heavily affected by the pandemic related restrictions also in 2021.

#### 【記事 : Article】

##### 1. EMSA' s report on the COVID-19 pandemic' s impact on shipping

Since the World Health Organisation (WHO) declared the COVID-19 disease a pandemic in March 2020, travel restrictions are used as a measure to confine the further spread of the SARS-

CoV-2 virus also in the EU Member States. Lockdown measures lasted until June 2020 in several countries, and more lockdown measures were introduced in the second half of 2020. The ban of non-essential travels had strongly restricted the free movement of people.

The on-going COVID-19 pandemic is continuously affecting all shipping sectors from passenger ships to container ships and oil tankers. It is EMSA's aim to give an overview on the pandemic's impact on the shipping industry by publishing the figures on trends in the transport of passengers and cargo, ship calls to EU ports and other parameters to assist the EU in determining a recovery strategy.

Since July 2020, EMSA continues to publish data to analyse the impact of the COVID-19 pandemic on certain shipping activities and vessel traffic. The EMSA reports are based on vessel movements statistics, showing the port call trends and related statistical data. EMSA uses mainly data from the Union Maritime Information and Exchange System (SafeSeaNet), and in certain cases, these data are combined with LRIT and MARINFO data. The EMSA reports geographically include the figures and findings of the shipping sector in the EU Member States, EFTA countries (Iceland and Norway) and the UK, which is included in the statistics because in 2019, the UK was still an EU Member State and in 2020, the Brexit transition period was still ongoing (EMSA 2021a).

The EMSA report presents the changes in the ship calls at EU ports, ships flying the flags of the EU Member States, the traffic intensity between the EU and China and with the US, irrespective of the flag of the ships, as well as the changes for cruise ships and other passenger ships by analysing the differences in PoB on passenger ships (2019 vs. 2020 vs. 2021) (EMSA 2021/9). However, the report cannot serve the purpose of an economic impact analysis as trade volumes are not available in the EMSA systems.

## 2. EMSA data on changes in maritime transport in 2020 compared to 2019

### 2.1. Ship calls to EU ports

Concerning ship calls there were 776,964 ship calls to EU ports in 2020, compared to 882,960 ship calls in 2019, a decrease by 12.0% in 2020 compared to 2019 (EMSA 2021b). The significant decrease in the number of ship calls began in week 12 (16-22 March 2020), after the WHO had declared the state of a worldwide pandemic. The COVID-19 outbreak impacted ship traffic due to the limitations in movements of passengers and crew members, in particular affecting passenger ships, and the lockdown measures in various EU Member States, which also reduced international trade. Considering the impact of COVID-19 on different ship types, cruise ships (-85%), passenger ships (-39%) and chemical tankers (-23%) are the ship types affected most with the highest decrease in ship traffic, when comparing port calls in 2019 and 2020 (EMSA 2020a, EMSA 2020b, EMSA 2021b).

### 2.2. Ships flying the flags of EU Member States

In 2020, the total number of vessels flying the flags of EU Member States calling at all ports in the world decreased by 6% in comparison to the same period in 2019. The year 2019 is chosen as reference since it was the last year without COVID-19 in Europe. A significant decrease started in mid-March 2020, until April, May, June, and July 2020. Starting from week 30 in 2020, however, this trend appeared to stabilise, with alternating small positive and negative weekly variations (EMSA 2021b). Regarding the total trend in 2019 compared to 2020, the calls to EU ports decreased by -6% and the total GT decreased -14% in 2020, compared to 2019 (EMSA 2021b). Considering the results for calls at EU ports per ship type, the COVID-19 outbreak impacted ship traffic due to the limitations in movements of passengers and crew members and heavily affected passenger ships. The lockdown measures in various

EU Member States reduced international trade and passenger transport. The number of ship calls regarding different ship types per week at EU ports in 2020, all ship types experienced a decrease, however, to different extends. The highest decrease in port calls was recorded for cruise ships in 2020, with a decrease of -85% for the full year 2020, followed by -39% in passenger ships and -23% for vehicles carriers (EMSA 2021b). The most affected countries are Croatia, France, Iceland, and Spain. The declines in number of ship calls between 2019 and 2020 are attributed to the cruise and passenger ships coastal traffic, which has been heavily affected by the pandemic-related restrictions of non-essential travels (EMSA 2021b).

EMSA also analysed the variation between 2019 and 2020 regarding the total number of port calls (worldwide) by EU-MS flagged vessels by ship type and week (EMSA 2021b). Regarding the total number of port calls (worldwide) by ship type of EU-MS flagged vessels, the main decreases were seen in 2020 compared to 2019 for cruise ships with a total decrease of -64% in 2020 compared to 2019, followed by vehicles carriers and oil tankers (EMSA 2020a, EMSA 2020b). The only ship type under EU flag that experienced an increase in port calls worldwide in 2020 compared to 2019 was the Ropax ships with a plus of 8% (EMSA 2021b). Regarding the number of port calls worldwide of EU flagged ships, the ships flying the flags of Croatia and Spain saw the biggest decrease of -52% and -32%, respectively, in 2020 compared to 2019 (EMSA 2020a, EMSA 2020b, EMSA 2021b).

### 2.3. The EU - China and EU - US traffic under pandemic conditions

The EMSA statistics on the trend of ship traffic between EU and China, irrespective of a ship's flag, compare the calls in Europe by ships, which had previously called at any Chinese port approximately one month before for the year 2020 compared to 2019. This represents a reasonable

travel time for a ship journey from China to Europe. The same was calculated for the opposite direction from European ports to Chinese ports. EMSA applied the same methodology to assess port calls by ships between Europe and the US, considering an expected voyage duration of 10 days. To assess the type of trade that was most affected in 2020 by the pandemic on the EU-China trade route, container ships are by far the most frequent ship type, making them the most interesting type to assess.

EMSA recognises that the calculation of the number of ship calls, incoming and outgoing traffic in Europe, provides an indication of import/export volumes, but without providing a safe indication of the real direction of the traded goods (EMSA 2021b). Regarding the number of port calls, in particularly during March, April and May 2020, ship traffic from Europe to China and the US decreased in comparison to the same periods in 2019.

Regarding the changes in port calls in traffic from China to Europe in 2020, the port calls decreased by -41.5%, while from Europe to China, the decrease reached -52.7%. The number of port calls of 51,757 in 2019 decreased by more than half to 20,268 in 2020 (EMSA 2021b).

Regarding the trade between China and the Europe, the main ship types engaged in trade in 2019 and 2020 were container ships, vehicle carriers, general cargo, gas carriers and bulk carriers. The number of ship calls in direction from Europe to China increased for general cargo ships, gas carriers and bulk carriers, but the number of ship calls decreased by -59.2% for vehicle carriers and by -57.8% for container ships, which represent the most important type of ship used for trading goods between China and Europe. In the direction from China to Europe, the reduction in the number of ship's port calls for containerships was -42.1% and of vehicle carriers -41.7% (EMSA 2021b).

Regarding the port calls between Europe and the US, the number of port calls of ships travelling from the EU to the US decreased by -32.9% in 2020 compared to 2019. In absolute numbers, the port calls from the EU to the US decreased from 2,697 in 2019 to 1,809 in 2020. The number of port calls from the US to Europe decreased by -38.8% in 2020 compared to 2019. In absolute numbers the port calls decreased from 2,991 in 2019 to 1,829 in 2020 (EMSA 2021b).

Regarding the trade between Europe and the US, container ships and vehicle carriers are the most relevant ship types. Contrary to the trade with China, for containerships, the pandemic's impact is higher on incoming voyages from the US and lower on outgoing voyages from Europe to the US. In trade from the US to Europe, the number of port calls by container ships dropped by -38.1% in 2020 compared to 2019, but by less (-20.5%) in the number of port calls in the trade from Europe to the US. Even though less significant in terms of volume of port calls, vehicle carriers are the ship type showing the highest decrease in the number of port calls from Europe to the US (-73.2%), whereas in the opposite direction the decrease reached -43.4% (EMSA 2021b).

#### 2.4. The pandemic's impact on cruise ships and other passenger ships

The COVID-19 pandemic led to restrictions on the free movement of people and on their non-essential travels. Cruise ships and passenger ships are the two ship types mostly affected by the pandemic. Every major cruise line in the world suspended departures in March 2020, while some cruise operators decided in August 2020 to gradually return to service at reduced capacities. In most cases, these were single-nationality cruises, calling in at a limited number of ports, usually in the country of origin. Nearly all cruise lines are on an operational pause, bound by decisions of the Cruise Lines International Association (CLIA).

Regarding cruise ship calls, in March 2020, EMSA started its analysis of cruise ship related data and produced a status report including a list of cruise ships located at EU ports, moored or at anchor, a list of sailing cruise ships having declared an EU port as the destination in the coming days, and associated maps showing the positions of the vessels.

Over the year 2020, the figures show a growing number of cruise ships bound for EU ports and staying at ports or anchorages. The destinations are mainly ports in the Canary Islands, Germany, the Mediterranean, Portugal, and the UK. Regarding the total number of Persons on Board (PoB) for cruise ships and other passenger ships, which functions as an indicator for the activity of cruise ships, EMSA analysed the changes in the PoB numbers for different ship types.

Cruise ships and other passenger ships showed a significant decrease in the number of Persons on Board (PoB) in 2020. Cruise ship operators almost lost their entire businesses during the COVID-19 pandemic in 2020, after the number of PoB began to decrease gradually from the beginning of March 2020. Currently, the numbers remain at a very low level and correspond to crew members on board these ships (EMSA 2021b).

The EMSA analysis focuses on ships carrying passengers including cruises, passenger ships and RoRo/passenger ships, which were mostly affected by the COVID-19 pandemic. The most affected countries are Croatia, Finland, France, and Spain (EMSA 2020/12).

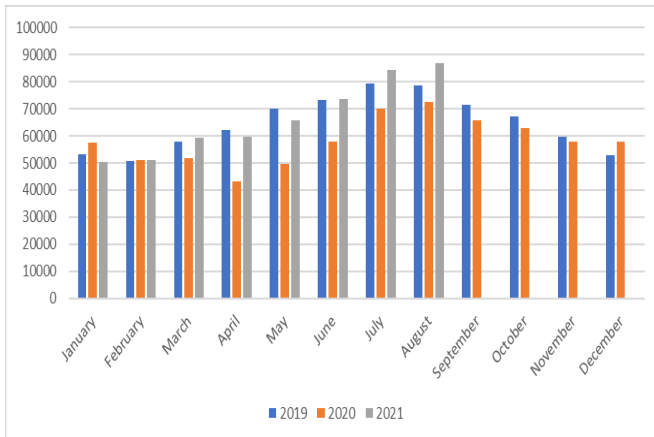
### 3. EMSA's September 2021 report on the changes in maritime transport

#### 3.1. Ship calls to EU ports

The EMSA report entitled "COVID-19 - Impact on shipping", published on 10 September 2021, is the ninth monthly report in 2021 (EMSA 2021/9). The results based on data collected by the EMSA regard data on shipping traffic, vessels movement and port call trends up to September 2021. The

development of ships calls at EU ports by comparing August 2019 and August 2021 data shows that there were 78,559 ship calls in August 2019 at EU ports, the last year without COVID-19 pandemic influence. In August 2021 there were 86,865 ship calls, representing an increase of 11% compared to 2019.

Fig. 1: Comparison of the number of ship calls per month in 2019, 2020 and 2021



Source: <http://www.emsa.europa.eu/newsroom/covid19-impact/item/4525-september-2021-covid-19-impact-on-shipping-report.html>, EMSA 2021b

While the number of ship calls per month in 2020 showed a significant decrease ever since the week after the WHO declared the COVID-19 outbreak a pandemic (16-22 March 2020), in July and August 2021, the ship calls were finally higher in EU ports than in the same months in 2019, prior to the pandemic (EMSA 2021b).

### 3.2. Development of activities for ships flying the flags of EU Member States

Regarding the impact of COVID-19 on the activities of ships flying the flags of EU Member States, with the UK being excluded, the data shows the number of port calls for ships flying the flags of EU Member States at any port in the world on a month-by-month bases for both years, 2020 and 2021, compared to the same periods in 2019. The total number of calls at all ports in the world for vessels flying the flags of EU Member

States, excluding the UK, show a decrease of -3.5% in 2020 compared to 2019. Similarly, the related total gross tonnage decreased by -11.1%. A significant decrease started in mid-March 2020, while from August 2020 onwards, the trend stabilised with alternating small positive and negative monthly variations (EMSA 2021a).

A reduction in the number of worldwide port calls is observed for most of the EU Member States flagged fleets. The highest decreases in traffic, in percentage, comparing 2021 with 2019, are observed for ships flying the flags Croatia, Bulgaria, France and Greece.

EMSA analysed the variation between 2019, 2020 and 2021 in the total number of port calls (worldwide) by EU-MS flagged vessels (UK excluded) by ship type and month. The data shows that the COVID-19 pandemic and the related lockdown restrictions had an impact from the end of March 2020 for all ship types under EU MS flags. Since August 2020 the number of port calls (worldwide) from EU flagged passenger ships has shown an increase in comparison to 2019. Similarly, starting from July 2020, it was observed a positive trend for the EU flagged Ropax traffic. The biggest decrease in port calls is seen for cruise ships, with a decrease of -66% when comparing the results of 2020 and 2019, as well as 2021 in comparison to 2019 (EMSA 2021a). They are followed by the vehicle carriers with a decrease of -33% (2020 vs. 2019) and -30% (2021 vs. 2019), and then oil tankers with a decrease of -24% (2020 vs. 2019) and -21% (2021 vs. 2019), when comparing the first eight months of the years 2019, 2020 and 2021.

### 3.3. The EU - China and EU - US traffic in 2021

Regarding the traffic between EU and China irrespective of ship flags, it must be considered that the port call activities worldwide have been growing every year since 2008. When comparing 2020 vs. 2019 and 2021 vs. 2019, 2021 will be the first year since 2008 where this tendency is not

verified. It also must be considered the fact that the European trade in early 2020 was not affected by the pandemic, yet. The analysis is based on ship calls in Europe by ships which had previously called at any Chinese port approximately one month before from Chinese ports to European ports and the opposite direction. To assess the type of trade that was most affected by the pandemic, the ship calls were segmented by ship type. Container ships are by far the ship type sailing most frequently between China and Europe. EMSA applied the same methodology to assess port calls by ships engaged in trade between Europe and the US, with the difference of expected voyage durations. The calculation of the number of ship calls (incoming and outgoing traffic in Europe) provides an indication of import/export volumes, but it does not provide a safe indication of the real direction of the traded goods. Nevertheless, this methodology is used to show the traffic trends in 2019, 2020 and 2021 (EMSA 2021a).

The imports from China to Europe are slightly lower in March and April 2020 but the real impact of the pandemic becomes visible from May 2020 onwards with only 55% of the usual volume of port calls coming into the EU from China. Regarding exports from Europe to China, a first significant decline happens in April 2020 with the number of port calls originating in the EU and destined to China represent only 49% of the volume of these port calls in the same month in 2019. The most significant decrease is visible in May 2020, when the number of port calls from China to Europe drops to only 55% of the number of these port calls compared to May 2019.

A similar development becomes visible regarding the number of port calls by ships trading between the EU and the US. The impact of the COVID-19 pandemic becomes visible on the imports from US to EU in April 2020, with a first decline of 44% of the port calls compared to the same month of 2019. Again, a more severe drop occurs in May

2020 with only 24% of the port calls in 2019 from the US to the EU. As for the exports from Europe to the US, the situation is very similar, with a significant decline in the number of port calls from Europe to US ports in April 2020, representing 59% of the port calls observed in April 2019 and an even higher decline in May 2020 representing only 46% of the port calls compared to May 2019. Clearly, May 2020 was the month when the impact of the COVID-19 pandemic became very significant in terms of the frequency of the port calls to/from China and USA from/to Europe. Instead, in the summer months between June and September 2020, some recovery in the number of port calls for some ship types became visible, in particular for Bulk carriers and Vehicle carriers for the trade with China and containerships and vehicle carriers for the trade with the US.

Regarding the comparison of the first eight months in 2021 with 2020 on port calls from China to EU ports, shows a decrease of -20.4%, partially due to the still normal trade situation in the first three months of 2020. The variation in 2021 until August compared with the pre-pandemic year 2019 shows a 39.9% decline in port calls for imports from China to the EU. However, the month August 2021 shows for the first time since the start of the pandemic an increase in port calls in comparison to the same month 2020.

Considering port calls for vessels travelling from the EU to China, in the first eight months in 2021 compared to the same period in 2020 shows a decrease of -17.3% in port calls. Regarding port calls for vessels travelling from the EU to China for the year 2021 until August compared with the same period in the pre-pandemic year 2019 shows a -53.0% decline in (EMSA 2021/9).

Regarding port calls from the US to EU ports, the comparison of the first eight months in 2021 with 2020 shows a significant increase of 41.0%. However, the eight months 2021 until August compared with the same period in the pre-pandemic year 2019 shows still a -28.5% decline in port

calls for imports from the US to the EU. Nevertheless, there are promising signs of recovery in the number of port calls for imports from the US to the EU since March 2021 (EMSA 2021/9). Regarding the port calls for exports from the EU to the US, the comparison of the first eight months in 2021 with 2020 shows a significant recovery with an increase of 82.3%. The variation in 2021 until August compared with the pre-pandemic year 2019 still shows an increase of 38.7% in port calls for imports from the EU to the US (EMSA 2021/9). This shows not only a complete recovery of export related port calls from the EU to the US, but it shows even an increase in comparison to pre-pandemic times as the figures even surpass the pre-pandemic levels of port calls, thereby showing significant recovery in 2021.

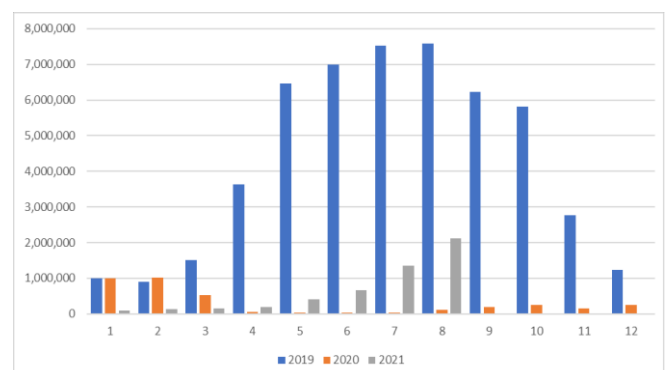
Regarding the development of shipping activity based on ship types, they show an increase in the beginning of 2020 for almost all ship types and directions in the trade between Europe and China/US. Once the effect of the COVID-19 pandemic becomes more evident in 2020, the differences between the current year and the previous two years (pandemic and non-pandemic years) are showing how much the traffic increased in 2021 compared to 2020 and if that uptake has already the quality of a recovery towards a normal standard, based on the port call values in the pre-pandemic year 2019. The main ship types engaged in trade between Europe and China are by far containerships. Vehicle carriers also appear with some relevance but with a much smaller number of port calls (EMSA 2021/9). From China to EU the containerships and bulk carriers are the most affected ship types with negative variations of -48.8% and -13.6% compared with 2019. All other ship types have recovered. From EU to China aside bulk carriers with a positive variation of 6.3%, all the remaining ship types show decreases from -58.1% for containerships to -17.8% for general cargo, in comparison from 2021 to 2019 (EMSA

2021b). The ship types monitored in trade between Europe and the US are containerships and vehicle carriers. For containerships and for the outgoing voyages from EU to the US, compared with 2019, there has been a full recovery with an increase of 2% of the number of port calls from Europe to the US. However, vehicle carriers are still very affected in terms of number of port calls with an -42.6% decrease (EMSA 2021b). Trade from the US to Europe by ship type has seen a significant decrease in 2021 in both, vehicle carriers and containerships. Their port call activity in 2021 compared with 2019 decreased by -40.3% and -50.5% respectively (EMSA 2021b).

### 3.4. Development of activities of cruise ships and passenger ships

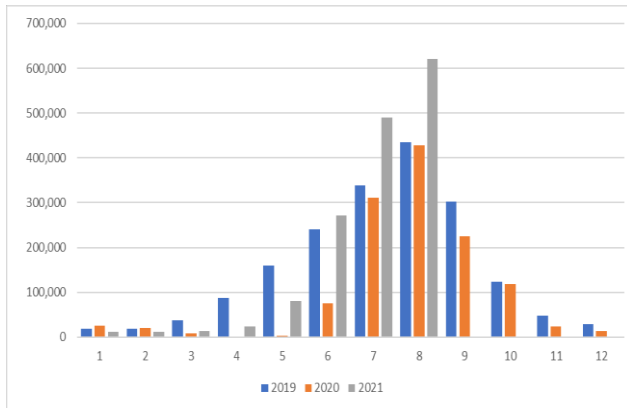
Since March 2020 and continuing in 2021, the COVID-19 pandemic continues to have a significant impact on the maritime passenger transport. Cruise ships are the ship type affected most by the COVID-19 pandemic as they operate for non-essential leisure travels, which have been entirely restricted during all the various lockdown periods in 2020. Every major cruise line in the world suspended departures in March 2020, while in 2021, cruise industry seeks to resume operations. In March 2020, EMSA started its analysis of cruise ship related data and produced a report with the list of “cruises sailing to EU ports”, among others.

Fig. 2: Persons on Board cruise ships, 2019, 2020, 2021 (until August 2021)



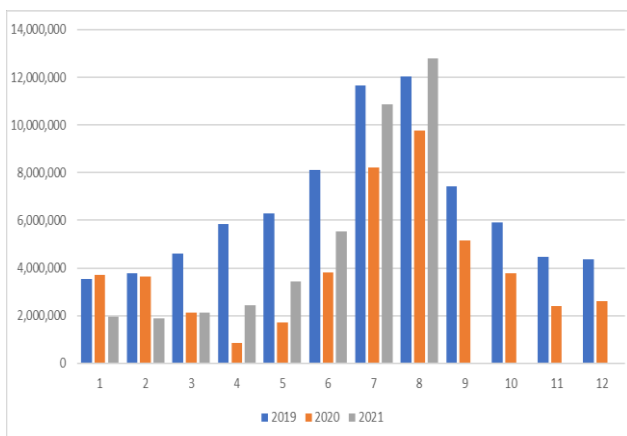
Source: EMSA 2021b

Fig. 3: Persons on Board of passenger ships, 2019, 2020, 2021 (until August 2021)



Source: EMSA 2021b

Fig. 4: Persons on Board Ro-Ro/Passenger ships, 2019, 2020, 2021 (until August 2021)



Source: EMSA 2021b

Regarding the total number of Persons on Board (PoB) for cruise ships and other passenger ships, EMSA analysed the changes in the PoB numbers for different ship types. For cruise ships, the EMSA data shows a significant decrease in the number of PoB when comparing the last pre-pandemic year 2019 with 2020 and 2021. Fig. 2 demonstrates that the number of PoB began to decrease gradually from March 2020, and the current numbers remain at a low level, however, showing an improvement in comparison to 2020.

Instead, as Fig. 3 and 4 show, passenger ships and Ro-Ro/Passenger ships see a significant recovery in the months July and August 2021, when the number of PoB even surpassing that of the last pre-pandemic year 2019 (EMSA 2021b).

## 4. Conclusion

Regarding the ships' movement between EU, China, and the US, the EMSA reports show the impact of the COVID-19 pandemic on maritime transport, with the development in the number of ships calling at EU ports, Chinese and US ports. The data shows a partial recovery in year 2021 regarding the traffic and ship calls with the US, but a continuation of lower than pre-pandemic figures for the traffic with China. EMSA analyses of the traffic between EU and China show in the first eight months of 2021 and compared to 2020 a slight tendency of slowed down decreases, but the negative trend currently continues.

Regarding maritime passenger transport and calls at ports, as well as PoB, the EMSA data comparison in 2019, 2020 and 2021 until and including August 2021 shows that cruise ships and other passenger ships experienced a significant decrease in the number of PoB. The PoB of cruise ships shows some improvement in 2021, but this ship type is still far from the pre-pandemic levels of PoB.

Instead, passenger ships have been experiencing a recovery in the months up to August 2021. The number of PoB in July and August 2021 even exceed the results of the pre-pandemic year 2019 in the same months. Regarding the PoB in case of Ro-Ro/Passenger ships, the 2021 figures until and including August 2021 show a significant recovery in the number of PoB. In August 2021, results even surpassed the pre-pandemic numbers of PoB. Concluding, the ESMA data shows that in some areas of maritime transport a process of recovery has begun, but in particular cruise ship industry will need more time to recover.

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