

Issue 1, 2022 (No.9)

THE MARITIME *Economist*

CONNECTING ACADEMIA AND PROFESSIONALS

*IN*focus

TRANSACTIONAL BUSINESS OR LONG-LASTING
RELATIONSHIP IN A COMPLEX SYSTEM?

Jan Gelderland

CONFERENCE REPORT

IAME 2021
Rotterdam

Gordon Wilmsmeier, Jason Monios

“ Reflecting on the trade of low value goods - a potential for de-growth? ”

Organizational Blocks

Institute of
Seatransport

Commentaries

COVID-19: Impacts on the
Maritime Industry
Alan WK Leung, Yui-yip Lau

www.me-mag.org
ISSN: 2408-0683

Message from the Editor

Adolf K.Y. Ng
Editor-in-Chief

Welcome to The Maritime Economist (ME-MAG), an initiative of the International Association of Maritime Economists (IAME). ME-MAG aims to create an active platform for merging academic studies with practice. It encourages IAME members to express their studies in plain language in line with the interests of policymakers and practitioners in the maritime industry. Also, it encourages experts in the maritime industry to share knowledge and experiences about emerging topics, challenging issues, and rising problems.

The coronavirus has co-existed with us for more than two years. Apart from understanding its impacts, it is now perhaps the time for us to seriously identify the right direction for our industry to evolve in the post-pandemic (or co-existing) era. In this case, we are very glad to have Mr. Jan Gelderland, the former CEO of Thyssenkrupp Veerhaven, sharing his view on container shipping's price-making and impacts on shipping supplies and demands. In addition, this issue covers a wide range of topics of substantial interests, including the trade of low value goods, impacts of shipping energy transition on port planning, climate adaptation planning of ports, the roles of dry ports in port sustainability, to name but a few. Finally, the report of our Association's annual flagship event, IAME 2021 Rotterdam, can also be found in this issue.

I hope that you will find the contents inspirational in generating new ideas for our industry in battenning down the coronavirus hatches.

Happy reading!

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The MARITIME ECONOMIST (ME-MAG) is the official magazine of the International Association of Maritime Economists (IAME) (www.mar-economists.org). Its aims to create an active platform for merging academic studies with practice. It serves as a promotion stand for scholars, policymakers, and industrial practitioners in the industry. In this way, it motivates and encourages both IAME and non-IAME members to express their studies in plain language in line with the interests of policymakers and practitioners. Also, it encourages experts in the maritime industry to share knowledge and experiences about emerging topics, challenging issues, and rising problems.

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Transactional Business or long-lasting relationship in a complex system?

Jan Gelderland



The present shortage in container shipping, containers, and terminal capacities demonstrates that the old system of shipping market poses a major challenge to shippers, shipping lines, and container stevedores. A challenge where the question is appropriate if the continuation of the short-term price making can be left to the short-term supply and demand. The investments shipping lines and terminals are always long term and require a healthy return on invested capital (ROIC). Most of the time, however, the demand and supply are out of line. Surprisingly 90% utilization in any business is a shortage, and in container shipping is underutilization and presses the rates to unhealthy levels.

This is a phenomenon that I have never understood even after many years in the industry. The throat-cut competition in the industry have retained a rate-making process that is driven by opportunistic use of the situation at hand – at the expense of the weakest party at that moment. The weaker parties are driven to pricing that prevent a healthy business principle to be retained. Thus, a reasonable stable return on investments is needed to ensure a solid business concept that provides reliable connections between major areas around the world. Container shipping business as the backbone of globalization has developed overtime, whereby the just-in-time (JIT) concept was adapted to a large extent, reducing capital required in stock and warehousing capacity and avoiding additional handling. However, these pose major problems during periods of shortage. Containers are used a storage capacity as opposed to a transport means. This increases the number of containers required to run a service and limits shipping lines in the number of annual revenue loads per container. Also, the inventory in transit in containers limits the terminal capacity for container terminals. Containers are left on the

terminals longer as there is always some just-in-case (JIC) inventory, as opposed to JIT inventory in transit. Indeed, the terminals have already suffered from a dramatic increase in required peak capacity thanks to the ever-increasing vessel sizes. This requires more equipment, more people, and land areas for vertical storage space. Adding to the increased peak capacity in the transshipment hubs are the increased-size feeder vessels that are, basically, the previous linehaul vessels that need to connect both in- and outbound cargoes to the linehaul vessels simultaneously.

To resolve this issue is complicated. If one adds the peaks required to connect to and from the Inland (water, rail, truck connections), it becomes evident that to optimize the system, increased cooperation and price stability in the entire transport chain are of paramount importance. This keeps the transport going by timely investments based on healthy returns. The complexity is even bigger if one adds the role of the freight forwarding industry. They can represent many (small and big) customers offering the service of almost all the Lines. Also, they partly cover the total transport chain including the Inland. In return, the Lines are increasingly looking at the door-to-door services to



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ensure quick turnaround times of the scarce equipment. This creates considerable tension between the Lines (that pursue full service, the so-called 'carrier's haulage') and freight forwarders (that see this as their core business). Unsurprisingly, at present, we can see a power struggle over the question who performs the value-added service for door-to-door services. If we combine this with the challenges recently experienced by, amongst others, COVID-19 shippers and receivers are looking at the total supply chains and considering all the options that include near sourcing. The environmental requirements from governments and major customers drive the industry to look at all options and come up with the answers to provide an optimized stable and workable transport system.

The challenges are huge. Stability and sustainability are required to provide global trade with a system that offers the means to move essential goods (e.g., food) around the world. The end-user does not care how it is provided as long as it is provided. It is up to all the players in the chain to convert from a short-term view towards a longer relationship with predictable capacity. This is a major challenge and will be interesting to see how the developments between all the parties progress in this exciting era of change.

As a very wise man once said; 'May you live in interesting times.'



Jan Gelderland

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INFocus

Influences of the COVID-19 on China's Global Container Shipping - A Maritime Network Perspective

Chengpeng Wan, Jiale Tao, Di Zhang

Introduction

Maritime transportation is the invisible backbone of the global economy, without which international seaborne trade could not occur. The capacity of global container ships shows an increasing trend in recent years, with an increase rate of 4.1% in 2020 (UNCTAD, 2020). However, the recent ongoing global outbreak of COVID-19 has a major impact on global shipping which is not only reflected in the short-term adverse impact during the pandemic period, but also a long-term ripple effect on the industrial chain. To investigate the influence of COVID-19 (especially at the early stage) on China's global container shipping, this study constructs the directed-weighted network of China's global container shipping, and analyze the dynamic changes of the spatial pattern of China's international shipping network after the outbreak of the COVID-19.

Methodology

The construction of the China's global container shipping network was achieved through the following steps. Firstly, the service information of some world-leading container liners from February to May 2020 was collected consisting of nine major shipping routes worldwide, which are Europe Line,

North America Line, Latin America Line, Middle East Line, Red Sea Line, India-Pakistan Line, Africa Line, Australia-New Zealand Line, and Near-Sea Shipping Line. Secondly, Specific information of each shipping route departing from Chinese ports was identified and sorted out, including port of departure, port of transit, port of destination, container carrying capacity, and canceled sailings. Finally, based on the above information, a weighted and directed network model of China's global container shipping can be established (Wan et al., 2020). The topological characteristics (Chen and Hu, 2016; Wu et al., 2019a) of China's international shipping network are evaluated with respect to the weighted average degree of networks, clustering coefficient, and average path length.

Results Analysis

The statistical results show that in the early stage (6th week of 2020) of the outbreak of the COVID-19, the China's global container shipping network lost more than half of the total shipping capacity (52.5%). Soon after, with the help of a series of prevention and control measures of the COVID-19 in China, the shipping capacity kept constantly recovering between the 6th and 12th week. However, China's export capacity decreased again after 12th week due to the

continued spread of the epidemic worldwide. It is reported that as of May 2020, the idle capacity of global container ships reached 2.65 million TEU, equivalent to 11.3% of the total global container shipping capacity, hitting a record high in history (UNCTAD, 2020).

Based on the complex network analysis, it is found that the topological structure of the Chinese container shipping network was also seriously affected after the outbreak of the COVID-19. The average degree, the clustering coefficient, and the shortest path lengths of the shipping network has decreased by 23.73% (from 5.28 to 4.08), 26.4%, and 19%, respectively. As shown in Figure 2.

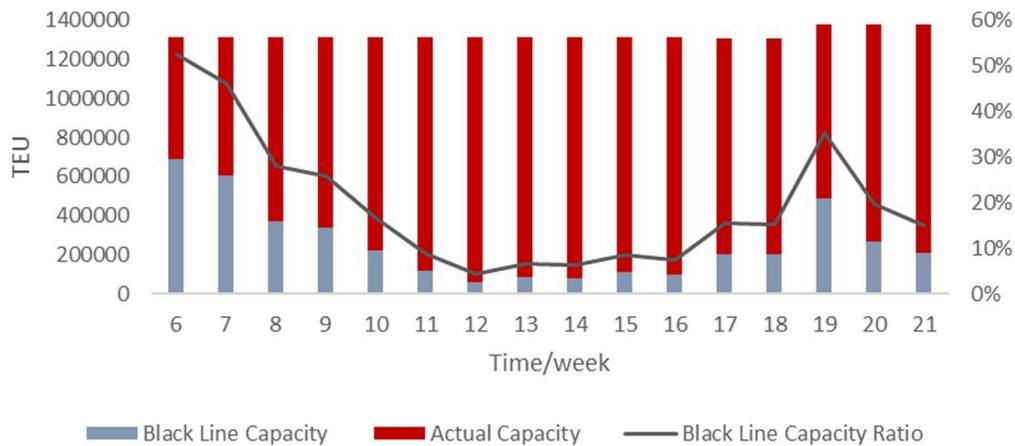


Fig.1 Change of shipping capacity (weekly)

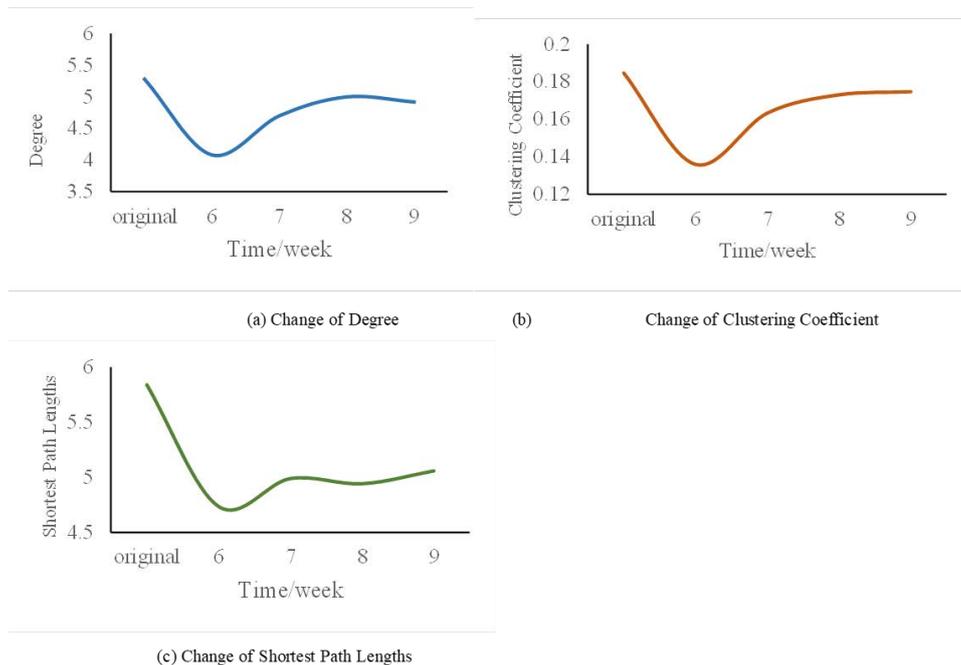


Fig.2 The change of degree, clustering coefficient, and shortest path lengths of China's international shipping network under the influence of the COVID-19

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The change of topological structure of Chinese container shipping network from 6th to 9th week of 2020 is shown in Fig.3. It is noted that only the top 25 (or so) ports in terms of their degree values are shown in the picture. Port of Ningbo (NGB), Shanghai (SHA), Jiamen (JMN), Qingdao (TAO), and Yantian (YTN) were still in a relatively active position even during the COVID-19 period, ranking high in terms of port degree value. SHA and NGB were among the most affected ports in the early stage of the COVID-19, in terms of the decreased value of degree and drop of weight of shipping routes associated. The results show that the ports in some regions have a significant agglomeration ability and strong container shipping capacity, especially in the coastal areas like the Yangtze River Delta areas (e.g., SHA and NGB) and Pearl River Delta areas (e.g., YTN). Moreover, hub ports play an indispensable role in the whole shipping network (Wu et al., 2019b)

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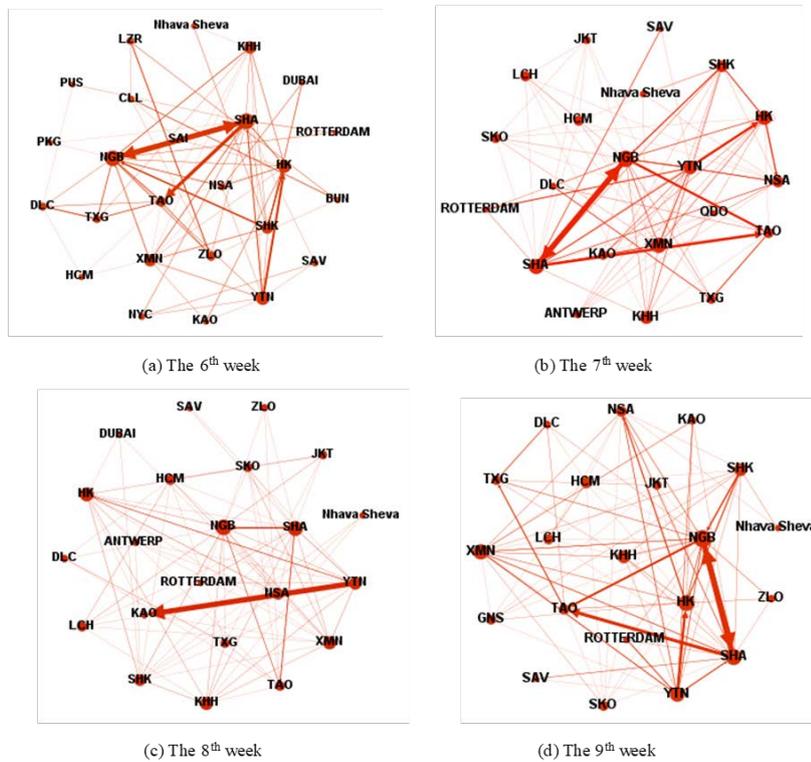


Fig.3 Topological structure of Chinese container shipping network from 6th to 9th week, 2020



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In Plain

Reflecting on the trade of low value goods - a potential for de-growth?

Gordon Wilmsmeier, Jason Monios

The current state of our climate: "... is worse, much worse, than you think." Wallace-Wells (2019). While many shipping analysts continue to predict uninterrupted growth for maritime transport, the evidence is mounting that many threats exist that will prevent such a scenario. Climate change effects range from famines, droughts, conflicts, and migrations that will impose limits on the ability to trade as well as its direct impacts on operations such as extreme weather and sea level rise. Other threats come from resource shortages that will provoke similar conflicts and breakdowns of global supply chains. More recently, the experience of COVID-19 has shown the impact of health pandemics.

Shipping is generally referred to as the backbone of global trade and its growth in shipping volumes is regularly discussed and celebrated as its contribution to global economic growth. The long-term reduction of international transport costs has been one of the drivers of global supply chain construction. Transporting goods across the planet as part of a system that "creates development" at the expense of the health of ourselves and our ecosystems, as external costs continue to be ignored and are not accounted for in transport prices, is a paradox. But what is the actual "economic and social" value of the products

that are being shipped? Would these products still be shipped if maritime transport costs were to internalize the sector's external costs?

This short article proposes three hypotheses for discussion:

1. The solution towards reaching the COP21 goals is not only in how maritime transport operates, but rather in what is being transported.
2. Low transport costs facilitate the transport of "non-value" adding products, as long as external costs are not internalized.
3. Low transport costs facilitate unsustainable fragmentation of supply chains, as long as external costs are not internalized.

Degrowth theory is considered heterodox by mainstream economics, but it has been around for some time (Georgescu-Roegen, 1971; Club of Rome, 1972), and it is now being taken more seriously (Hickel, 2020; Monios and Wilmsmeier, 2020; 2021). Rather than chasing endless growth, we must consider how to continue economic activity without wasting resources, where degrowth in shipping and ports relates to less volume but greater quality and value of the shipped products.

Trade is only stimulated if the difference of distinct price structures in different countries is not eaten up by the costs to connect the two trading partners. Kindleberger (1973) names two conditions for the realisation of transport services:

- a) Technical bridging of space by the disposition of adequate mobile transport entities
- b) Economic bridging of space by a scheme of “adequate” pricing

While the technological bridging, e.g., technological change and alternative fuels, is the focus in a significant body of research, less discussion can be found on the question: what is a level of transport costs, for transport services that makes the “bridging of spaces” to become sustainable (in all three senses: economic, social, and environmental)? Consequently, this article aims to initiate a discussion on a definition and possible characteristics of de-growth in the shipping and port sector.

Several product groups and types of trade can be identified for further study to highlight this problem and to begin to explore actual de-growth potential in the maritime sector. This is considering that each avoided transport would also contribute to reducing the maritime transport sector’s CO₂ emission, which are equivalent to 2.9% of global anthropogenic greenhouse gas emissions (IMO, 2020). Sample identified product groups with de-growth potential include fossil fuels (e.g., petroleum and derivatives, coal, gas), weight loss materials (e.g., iron ore, bauxite), waste, and plastic products (esp. low value, such as plastic spoons or similar).

As a first example, copper loses around 40% of its weight by being converted from raw material (ore) to a manufactured product (e.g., tool). Thus, from a theoretical standpoint, shipping of the manufactured product instead of the raw material could reduce this trade from 52.9 million tons (2019 trade data according to COMTRADE, 2021) to 31.7 million tons. Considering that copper ore will be transported by ‘Handy Size’ (24000 – 35000 DWT) or ‘Handymax’ bulk carriers (35000 – 50000 DWT) and using the full potential of weight reduction through conversion of the raw material into a manufactured product, provides a theoretical potential to avoid 530 voyages (@ 40000 DWT carriers).

A second example concerns the potential effect if we were to decouple from the modern narrative of fossil-fuel-driven economic growth. A full decoupling could eliminate transport of petroleum products, which today make up for 30% of global maritime trade (in terms of volume), as well as coal, which is equivalent to 11% of global maritime trade (UNCTAD, 2020).

A third example concerns the possible avoidance of shipping very low value products. In 2019, 7.54 million tonnes of tableware, kitchenware, other household articles and hygienic or toilet articles made of plastics were traded with an average value of 0.00488 USD/tonnes (COMTRADE, 2021). In the same year 75.93 million tonnes of waste and scrap of paper and paperboard were traded internationally with an average value of 0.00019 USD/tonnes (COMTRADE, 2021). An emerging question from such examples is: what is the economic and sustainable value of shipping such low value products and waste?

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These few examples intend to contribute to the critical discussion of the shipping sector's role in global trade and supply chains and to highlight possible scenarios that are juxtaposed to the traditional growth and positivist projections. Current and emerging threats will impact on global trade. Extended supply chains are already becoming less secure, slower, and more expensive. Trade costs in general and transport costs can be expected to rise. The environmental damage by global trade and the role of shipping can no longer be ignored. According to the IPCC (2021), if we are to protect the long-term possibility of "civilisation", we have no choice but to decarbonise by 2050 and that might well require de-growth. Such need opens a new discussion in a traditionally economies of scale driven industry. A further emerging question relates to a new discussion on possible or even "needed" new regulation or re-regulation of prices in shipping.

Remarks

For further readings, see:

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In Plain

Geologistics: A new role for dry ports in enhancing port sustainability

Jagan Jeevan, Nurul Haqimin Mohd Salleh, Nur Hidayati Abdul Karim

Geologistics is a new concept in achieving seaport (hereinafter called 'port') sustainability in a dynamic environment. In this regard, geologistics is an inclusive term used to describe the process of concentrating all knowledge for the purpose of utilizing the resources of the world for the welfare of mankind (Sachaklian, 2012). Resources can be classified into four main groups, namely natural resources, capital resources, human resources, man-made or cultural resources (Aikins, 2014). However, geologistics is not part of sustainability and not many investigations have been done to minimize the lacuna between these concepts (Wullur et al., 2020). In fact, as the design of sustainability suffers from certain drawbacks, it should be another critical component to be added to the current sustainability model.

In a port system, geologistics focuses on expanding port regionalization (Notteboom and Rodrigue, 2005) through utilizing regional resources to meet business aims (Jeevan et al. 2021). Thus, it is crucial to enhance the functionality of ports and become sustainable due to current uncertainty on maritime logistics and trade.

Currently, the activities of ports mainly focus on facilitating international trade activities. Their role is to explore the current resources in the hinterland that remain scarce. However, owing to its complex system and rigid procedure, such as multifunctional regulation, stakeholders, and system management strategies, from berthing of the vessel, the stevedoring (unloading or uploading) of containers, the transit and the stacking of containers, ports cannot always execute these functions effectively.

In contrast, dry ports, which are usually more flexible and agile may execute the practicality of geologistics. Dry ports are understood as logistical nodes that enhance the cost-effectiveness, environmental performance, and logistical quality of hinterland linkages (Cullinane and Wilmsmeier, 2011). They serve as regional intermodal nodes by duplicating the activities of ports, notably as a transshipment center and hub for regional growth. To do so, they provide a variety of services that encourage interfaces between different transport modes and between ports and manufacturers. The unique roles of dry ports can be leveraged to address the shortcomings of the current sustainability design, particularly by improving strategy implementation, reducing energy

transformation, enhancing monitoring and evaluation systems through information sharing, innovating in freight logistics, establishing the optimal stage of development, and fostering horizontal and vertical integration between ports and dry ports for the benefits of mankind. In this case, geologistics via dry ports needs to be assimilated within a port system for exploring, utilising, and optimising existing resources for mankind. Identify resources, locate resources, and placing them in motion are the major steps. Hence, dry ports can be used to replicate the role

of seaports in different locations (e.g., close to ports, cities, borders) to overcome some deficiencies in the current sustainability design. The goal is to identify, fund, and foster sustainable solutions for competitive port operations, effective shipping activities, minimize the impact from pollution as well as nourishing the growth of the regional economy. This sustainable model of ports is proposed to clarify that the current sustainability design is obsolete for the current port system, as summarized in Figure 1.

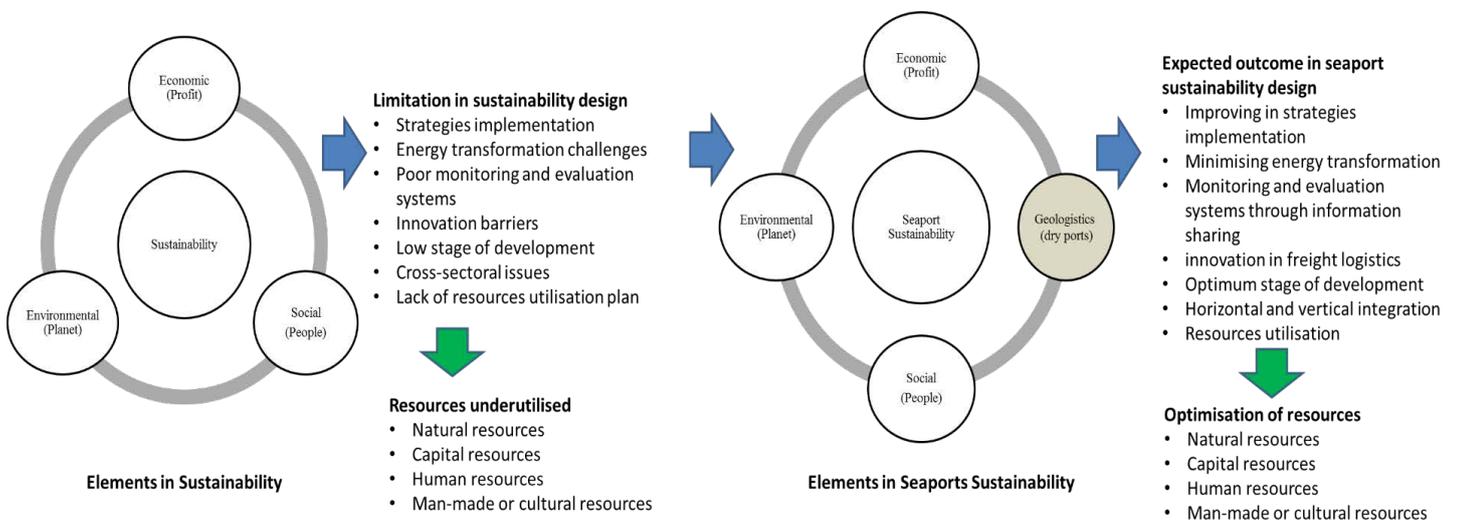


Figure 1. The transformation of sustainability to port sustainability through geologistics

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In Plain

The shipping energy transition: How is this impacting on port planning?

Alessio Tei

The environmental implications of the maritime industry on local regions have been documented by several studies that highlighted how port activities, such as ship movements (e.g., Tichavska and Tovar, 2015) and inland cargo distribution flows (e.g., Ambrosino et al., 2018), are major contributors to regional pollution. As such, several European Ports have recently planned to introduce environmental tax to main polluters (e.g., HPA, 2018) and other alternative policies are currently under discussion within the EU recovery plan (e.g., fleet renovation, investments in new energy solutions for ports and vessels). Moreover, several regional and national authorities are pushing port authorities to introduce environmental and energy transition plans as key factor for accessing special EU and national funding as a way for improving the environmental performance of ports.

Looking at the most recent reports delivered by main international port organisations (e.g., IAPH, 2021), the environmental impact generated by port activities is finally becoming a primary concern for many industry players, often being addressed within their long-term development strategies. Over the years, international standards (IMO, 2021) have pushed maritime stakeholders to

invest novel technological and organisational solutions to mitigate the pollution generated by the shipping industry. Despite this, these technological solutions are often hard to be widely adopted due to several implementation barriers (Acciaro et al., 2016).

Users' acceptance, deployment strategies, and the effectiveness of the environmental policies are far from being fully investigated and they would need to be further addressed for increasing the chances to achieve the declared long-term goals.

Within this framework, this study looked at the websites of EU major ports, comparing the advancement status of main environmental related plans to what the literature suggested over the past few years in terms of port environmental performance and related policy advises. One of the key findings was that, while most ports highlight the existence of environmental and energy plans, the advancement status – or specific details on the chosen solutions – are often unknown. For instance, implementation strategies of energy plans in major European ports often avoid detailing specific data on when and how carbon-neutrality (or similar KPIs) will be achieved. Publicly available information is normally focused in

describing general targets and the existence of testbeds, often in connection with specific technologies (e.g., hydrogen) for which it is possible for them to collect public funding.

Another issue relates to the effect of climate change: it has often been declared as a priority for many ports, with a need for novel investments capable of adapting infrastructure to new climate related challenges (Ng et al., 2018). Despite this, little can be found on port websites on their long-term plans to adapt port infrastructure to the ongoing climate crisis, showing a misalignment between industry studies and actual port planning (partially overcome by the EU Green Deal and the EU Recovery plan).

Despite this, several port and maritime actors are trying to deal with the related issues in terms of funding, planning, and regulation. A key element in discussing novel investments in energy transition and climate change adaptation is the acceptability of the alternative solutions by different stakeholders and the impact on the processes – and logistics operations – of such changes. As such, innovative solutions could be promoted only linking both technological and political aspects to new port management tools (e.g., concessions Ferrari et al., 2013]) capable of aligning the interests of all the involved stakeholders and increasing awareness on the advancement status of ongoing plans.

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In Plain

How to Tackle the Barriers in Adapting to the Impacts Posed by Climate Change? A Best Practice from the Port of Montreal, Canada

Tianni Wang

Introduction

With increasing evidence that stresses the accelerating pace of climate change, there has been no scarcity of research that assess climate risks and cost-effectiveness of adaptation measures in the transport sector. Nevertheless, the existing literature associated with adaptation planning for climate change is still at an embryonic stage with little attention on some potential dilemmas. Understanding such, this article focuses on how to respond to the barriers in climate adaptation planning in transport systems. This is achieved mainly through reviewing the literature in transport adaptation to climate change impacts (e.g., Wang et al., 2020) to summarize eight conditions (potential barriers) that the shortage of those might lead to the failure of climate adaptation planning. The eight conditions are “Adaptation Awareness (A)”, “Climate Data (D)”, “Analytical Tool (T)”, “Transportation Infrastructure (I)”, “Financial Resources (F)”, “Planning and Investment Strategy (S)” and

“Governmental Policy & Mechanism (P)” and “Collaboration & Communication (C)”. Next, those conditions are examined by a case study on the Canadian port of Montreal's experience in tackling the Great Lakes and St. Lawrence River's dropping water level in 2014-15. It strives to bridge the research gaps and provide decision-makers with a novel thinking pattern and workable recommendations from design, implementation to the reconstruction of adaptation planning and facilitate a paradigm shift in broader sustainable transportation management.

The dropping water level in the port of Montreal

The climate along the Great Lakes is changing. It is noticeable that there are shorter winters, less ice cover with an increase in annual temperature over the past decades. Canada and the US have projected a significant drop in water level in the Great Lakes since the 1980s. In this case, the Port of Montreal is an important industrial heartland in North America that provides fast channels and

economical services to the central Canadian and US markets. As the cargo volume that a ship can carry relies on the minimum water depth along the navigation channel, dropping water level along the St. Lawrence River would deteriorate the port's operation and increased operational costs.

Meanwhile, once the dropping water level situation becomes severe, the port has no choice but to strengthen the facilities and infrastructure to adapt to it. Since carriers will impose more than USD 200 surcharge per container on the shippers when the vessels cannot be filled in a low water level condition, the butterfly effect of the increasing cost would finally pass downstream to the customers and deteriorate the current advantages of the port of Montreal compared to other competitors (e.g., port of New York). Moreover, if lower water level restrains the shipping business, containers may need to be stocked somewhere inland until the water level arise, more freight and rail would be supplemented. Both effects will subsequently increase the costs and modify the transport pattern of the entire supply chain.

An analysis on the port of Montreal in climate adaptation planning

The analysis of adaptation planning of the port of Montreal can be summarized into eight potential barriers. However, some were not set as real barriers, but strengths (i.e., the factors have been well developed) or partial enabler (i.e., the factors waived to be further improved) developing the adaptation plan (Table 1).

As explained in Table 1, the barriers are mainly attributed to uncertain planning cycle, the lack of specific risk-analysis system, and the low public participation in port planning. Thus, from the case of the port of Montreal, we can advise that

besides enhancing the collaboration between internal and external stakeholders, ports should draw their own experiences and strengthen the forecasts of climate change and construct approachable alternative strategies to conduct effective adaptation planning. With respect to future adaptation planning, decision-makers should balance the cost, effectiveness, environmental, accessibility issues to choose the cost-effusive options. Finally, we expect that further considerations on planning cycles, risk-analysis system, and public participation can trigger more discussions and insights for the development of effective adaptive solutions to ports.

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Table 1. The eight factors in the analysis of adaptation planning of the port of Montreal, Canada

Categories	Factors	Analysis
Strength	Adaptation Awareness (A)	The issue of dropping water level posed by climate change has been well recognized in the port of Montreal. The main adaptation measures include forecast and analysis of water level, implementation of dredging and electronic navigation. The port has been actively involved in the Green Marine program for the sake of reducing GHG emission to encourage green transportation.
Partial Enabler	Climate Data (D)	The port attempted to promote the system to major shipping lines, carriers, terminal operators, train operators and all other related stakeholders to minimize (or at least delay) the necessity of capital dredging. The introduction of electronic navigation is an environmentally friendly way to reduce the cost of adapting to the impacts of dropping water level, and which is the priority of future climate adaptation planning. Nevertheless, facilitating the forecast of the magnitude and scope of the future change of water levels (Slack and Comtois, 2016) and the uncertainties (i.e., hurricanes, high winds, heavy rain and snow, less ice cover) posed by climate change calls for more attention.
Partial Enabler	Analytical Tool (T)	The port of Montreal has considered climate change in its port planning and constructed an elementary risk-analysis procedure. There is in-house software that allows all the risks to be evaluated as for their likely severity, impact (e.g., reputation, financial, human resources, security, and productivity), recurrence, and frequency (probability). Even though, there is a lack of a specific risk-analysis system for climate change, such as systematic and quantitative climate assessment framework. Current risk analysis is mainly based on the relevant risk management mechanism, as well as safety and security plans.
<u>Barrier</u>	Transportation Infrastructure (I)	As for capital dredging, in addition to the consideration of legislative and institutional assessment, the high cost of capital dredging is another barrier to overcome. Meanwhile, supplementary measures may need to be considered during capital dredging (i.e., adding dykes and control systems). Finally, social acceptability is a pivotal issue in conducting capital dredging as it may

		trigger negative attitudes and even conflicts among the riverfront communities. Accordingly, dredging is a transitional option during a long-term adaptation planning, while all the detailed benefits of relevant stakeholders must be considered during the early planning stage (Working Group on the Integrated Management of Dredging and Sediments, 2014).
Strengths	Financial Resources (F)	Some external support, including financial and infrastructural subsidization from different levels of government, accreditation about environmental issues from NGOs (e.g., Green Marine), and academic research from universities and colleges (e.g., University of Montreal) have been given to adapt to dropping water level in the port of Montreal.
<u>Barrier</u>	Planning and Investment Strategy (S)	One dilemma stem from uncertain timespan. Hitherto, the port of Montreal is setting a ten-year horizon in a climate adaptation plan. However, there is no specific reason to warrant the time horizon. Moreover, the uncertainties of occurrence of extreme weather event shrink the forecast from a 30-year horizon 50 years ago to beyond ten-year horizon nowadays, which consequently results in a short planning cycle for adaptation. This problem is consistent with the research in the complexity of adaptation planning: a relatively short planning cycle (10 years) does not correspond to infrastructure lifespan (typically more than 50 years) (Ng, 2012).
Partial Enabler	Governmental Policy & Mechanism (P)	International, regional, and domestic institutes (e.g., IJC, Environment Canada, municipal and provincial governments) have initiated regulations and guidelines to water management that offers the port with useful references during their decision-making process. However, decision-making and implementation of the adaptation plan is still based on a ‘top-down’ approach. Hence, the effectiveness of decision-making could be constrained by inadequate feedback from the public and external stakeholders during the process.
<u>Barrier</u>	Collaboration & Communication (C)	The lack of engagement stakeholders within and cross departments has limited the port by means of minimizing its costs, maximizing the benefits of port stakeholders, and the creation of a favorable environment for sustainable development. For instance, the introduction of electronic navigation is a transitional plan that may reduce the risks posed by dropping water level in the immediate future, but once the impacts of climate change get even more explicit,

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		<p>its effectiveness may, once again, be called into question. Thus, an effective adaptation plan must always be in line with high public participation (Few et al., 2007), especially when adaptation involves social and environmental acceptability (e.g., capital dredging).</p>
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Commentaries

COVID-19: Impacts on the Maritime Industry

Alan WK Leung, Yui-yip Lau

Numerous industries (e.g., the healthcare industry, the tourism and hotel industry, aviation) have been adversely affected by the outbreak of the COVID-19 pandemic. The maritime sector is one of the major industries that are now facing unprecedented challenges amid the pandemic.

The nature of supply chain system responds sensitively to human-made disasters and natural hazards. Therefore, the disruption caused by the outbreak of the COVID-19 pandemic to the import and export trading activities are enormous. In the context of the logistics industry, sea freight plays an important role of supporting air freight and surface logistics. Due to the pandemic, shipping cost has been rising significantly. For example, ocean freight rates have been dramatically elevated by 1,000%. With limited import and export and trade regulations, most countries must comply with certain rules to deliver cargoes. Nevertheless, the ongoing demand for ocean freight is a major challenge to the logistics companies despite the decline in demand. The rationale behind is that some transport operators would raise the price to make higher profits which further boost up the sea freight rates. Additionally, freight rates are still unstable because of the unpredictable delay and disturbance of distribution networks. In other words, freight rate nowadays fluctuates frequently on a weekly basis, but not seasonally. Thus, the cost of shipping has become inaccurate.

Moreover, the pandemic has sudden urged some of the countries to close their ports and implement 'lockdown' policy to minimize the transmission of the virus through vessels' transit. This has led to the prohibition of vessels' entry to various countries. As such, there would be lengthy delays in sailing dates and a considerable reduction in seaborne trade volume. Indeed, vessel slots offering has dropped severely during the pandemic. Furthermore, a critical shortage of empty containers induces increasing the shipping cost. This adds extra financial burden to various logistics firms and imposes barriers to the revitalization of global economic environment.

The manpower in these countries have decreased rapidly, especially in the US and Europe. As expected, there would be 60% drop in manpower. To this end, warehouses are either full or closed. Also, the retailers have stopped picking up containers and cargoes, which aggravate the problem of severe port congestion. Several vessels and cargoes are retained in western countries where there is a serious congestion situation. The space offering for cargoes has become scarce in global. This has further increased the freight rates and decreased the efficiency of cargo operation. Eventually, an imbalance between supply and demand will be a long-last effect in the forthcoming months. As such, we suggest the following measures to tackle these challenges.

For commercial sector:

- A. Offer discount rate to those inbound shipments into China region.
- B. Reallocate the sailing schedule to meet the changing market demand.
- C. Encourage customers to use vice versa container services.
- D. Implement rate adjustment surcharge to control the demand and supply.

For government sector:

- A. Adopt tax deduction or free taxation policy for those coming shipments into China region.
- B. Make rules to enforce the users whose pay return empty container surcharge.
- C. Impose a policy to encourage liners reschedule to meet the balance of container supply and demand.
- D. Enhance port and terminal infrastructure.



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Conference Report

IAME 2021 Rotterdam: Accelerating Transitions

Larissa van der Lugt

The Annual Conference of the International Association of Maritime Economists (IAME) held in Rotterdam (IAME 2021 Rotterdam) was - amidst Covid 19 - a successful physical conference, at the right time, at the right place. Connecting and exchanging research results and new insights is crucial in our work and it had been too long that we could do that. The conference theme, Accelerating Transitions was also right on spot. Amidst the climate crisis, the digital revolution, geopolitical shifts and on top of that unexpected disruptions like the pandemic, it was of utmost important to develop the right insights and ideas, helping our world leaders to make the right decisions.

Thus, with this conference with all the valuable presentations and discussions of its delegates and with the activities around it, we hope that we 'accelerated transitions' a little bit. The kick-off with a very interesting panel with top leaders in the Dutch maritime and port sector, underlined the huge challenges the sectors face. Following this, during the three days conference, we tackled a variety of topics relevant to the transitions that the maritime sector will have to make: on the ins and outs of digitalizing the maritime chain, on the future of alternative fuels, on a critical reflection on the role the IMO can play in enforcing real steps in the greening of maritime shipping, to name but a few. Work to do there. And it was good to see that the hybrid format worked

out well: there were many interactions with the delegates online. It takes some technicalities, but it added greatly to the feeling of a complete IAME community engaged.

One of the many highlights was the presentation of the recently published Maritime Review (<https://unctad.org/webflyer/review-maritime-transport-2021>) by Jan Hoffmann, Head of the Trade Logistics Branch, Division on Technology and Logistics, UNCTAD and former President of IAME. Interesting material for all of us. Besides economics, we also addressed the more technical side of the actual transitions, such as autonomous shipping. One could even get a view on it live at the Innovation Fair, providing the researchers the chance to see what innovations are developed in the Rotterdam Port Innovation Ecosystem. The clear message is that progress has been made fast and that it needs the involvement of many actors working together to get it implemented and developed further. But many questions remain to be solved for scaling up, so also here still quite some work to do.

IAME is not IAME without its social activities and, of course, its conference dinner. Luckily, unless Covid-19, it was possible – within the limits of all measures taken - to do that at the Stadshavenbrouwerij. A brand-new brewery in combination with a nice bar and restaurant in a

Discussing matters of common concern

former coldstore warehouse right on the quay of the former Rotterdam Fruit Port. Where in the past pallets full of fruits were stored on the ground, we were sitting and drinking beer and having food. Port transformation in optima forma. Good drinks, good food, good people, very good atmosphere. The IAME network at its best.

At the closing ceremony, in the tradition of IAME, three awards have been given for best papers. The MEL Palgrave best paper award went to Coen van Battum, The KLU Young Researcher award went to Lucie Letrouit, and the MPM Best Paper award went to Michael Prehn and Fredrico Jensen. Congrats to all the awardees. Finally, the Port tour showed the participants the evolution of the port of Rotterdam to its actual status of a large-scale modern port complex, full of automation and full in transition. A pleasant boat ride provided opportunity to take some magnificent pictures with the evening falling and all lights coming up in the port. How beautiful our field of study can be!

We are proud that the job is done and look very much forward to the next IAME conference in Korea to continue the discussions.

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IAME 2021
ROTTERDAM

Organizational Blocks

Institute of Seatransport

Founded in 1984, the Institute of Seatransport (<http://seatransport.org>) is one of the first local sea transport associations established by maritime professionals in Hong Kong. For over 30 years, the Institute has served and contributed to the maritime community in Hong Kong through uniting the professionals in the field of sea transport and promoting the exchange of professional knowledge within the maritime industry. The Institute has a unique and wide-ranging underlying membership structure where our members (both individual and corporate) come from a broad cross section of the sea transport industry, including:

1. government departments and regulators
2. academic and training institutions
3. industrial organizations and associations
4. ship owners, operators, and managers
5. marine insurers, brokers, and average adjusters
6. ship brokers and agents
7. maritime lawyers and arbitrators
8. ship and cargo surveyors/consultants
9. ship builders/repairers
10. logistics and freight forwarders

In addition to our members, the Institute is proud to have the continuous support and guidance from our Honorary Presidents, all of whom are highly esteemed and prominent individuals in the sea transport industry. The Institute regularly holds seminars, training courses, and academic conferences on a wide variety of topics and subjects in the field of sea transport, and often invites leading and prominent speakers to speak and share their view on topical issues arising in the

shipping and maritime industry. The official quarterly journal of the Institute, SEAVIEW, has been in circulation since 1985 and remains as one of the leading scholarly journals on maritime and shipping affairs.

In addition, the Institute organises social events, activities, and gatherings aimed at providing opportunities for our members and other interested parties to network and develop relationships in a more relaxing environment. The Institute regularly sponsors, participates, and organizes joint functions and events with other similar organizations both in Hong Kong and abroad.

Finally, the Institute plays an active role in the promotion and development of the sea transport and maritime industry in Hong Kong. The Institute is appointed as one of the institutional members of the Hong Kong Maritime and Port Board of the Hong Kong Special Administrative Region (HKSAR) Government which is “a high-level platform to provide strategic steer on the vision, direction and policy matters pertaining to the development of Hong Kong’s maritime industry and Hong Kong Port” (Source: <https://www.hkmpb.gov.hk/en/terms-of-reference.html>).

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I. GENERAL GUIDELINES

We are interested in (but not limited to) the following topics:

- Economics of maritime transportation
- Port governance, competition, utilization, and other related issues
- Management, leadership, and strategies in the maritime sector
- Arctic shipping and development
- Maritime policy and governance
- Climate change adaptation and resilience in the maritime sector
- Sustainability and environmental issues in the maritime sector
- Maritime geography and spatial analysis
- Behavioral science, marketing, and human factors
- Risk and business continuity management in the maritime sector
- Intermodal transportation, logistics, and global supply chains
- Safety related issues in the maritime industry
- Finance, asset management, and investments
- Digitalization in shipping
- New technology development in maritime industry
- Cruise and ferry economics and management

All submissions to different sections by scholars, policymakers, practitioners, and other maritime stakeholders will be considered. Authors should keep in mind that ME-MAG is not only published for scholars but to the larger society of the maritime industry and policymakers. Readers may not have a background on the presented topic and so authors should present the

the contents in a language and style that is clear to practitioners. Also, authors should consider the perspective of professionals, practitioners, policymakers, and other stakeholders who have general knowledge of the maritime industry but limited knowledge on the intended specific topic. We encourage narrative style, storytelling, metaphorical expressions, and other methods of non-fictional authorship. All the articles should be written in plain language, excluding jargons and using limited number of technical terms with brief and simple descriptions. There are no geographical restrictions to topics.

ME-MAG is divided into InFocus, InPlain, Organizational Blocks, Commentaries, and Conference Reports sections. Authors should submit their article to the Editor-in-Chief for further consideration by e-mail:

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2. SECTION SPECIFIC GUIDELINES

2.1 InFocus

This section is dedicated to industry professionals for presenting innovative solutions, created knowledge, and R&D results in practice. Authors should refrain from telling success stories and focus on the drivers and requirements for successful results. This section promotes research activities at non-academic institutions and encourages authors to present research achievements as well as core concepts and created knowledge. Authors should present some evidences for supporting arguments.

- **Not more than 2,000 words per article.**

2.2 InPlain

This section is dedicated to academic research performed by scholars and/or professionals in maritime research. Scholars can briefly present a research which will be published shortly in an academic journal or an already

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This section is dedicated to draw attention to critical problems in the maritime industry and academic research. It should be in op-ed format that provide comments on particular 'hot' topics in the maritime industry. Authors can submit a short article dealing with the problem and draw attention of readers to that challenging topic.

- **Not more than 700 words per article.**

2.4 Organizational Blocks

This section is dedicated to the introduction of maritime organizations (e.g., professional maritime organization, maritime department in a university, etc.). For this section, authors are encouraged to first discuss with the editorial team before making a submission.

- **Not more than 500 words per article.**

2.5 Conference Reports

This section is dedicated to articles that report a maritime-related conference. For this section, authors are encouraged to first discuss with the editorial team before making a submission.

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3. ARTICLE FORMAT

Your manuscript should be in single-column format, double-spaced, and with line numbers with Times New Roman 12 simple. Please keep the layout of the text as simple as possible. Submitted manuscript should have been 'spell checked', 'grammar checked', and free from plagiarism. Finally, authors should acknowledge the organization(s), individual(s), and/or funding source(s) in supporting their study, if applicable.

3.1 Figures, Tables, and Photos

Authors are welcomed to contribute figures, tables, and photos. However, they must have full ownership or ensure that they have full right to use them (i.e., a written permission from the owner) in ME-MAG. All figures, tables and photos should be numbered and have an appropriate caption (e.g., Table 1-, Figure 1-).

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Authors must ensure that all non-original sources are cited and referenced in the manuscript and reference list, respectively. Use APA citation style for references. A maximum of five (5) references is allowed.

3.2 Name, Title, Affiliation, and Biography

The submitted article must include the name, title, affiliation(s), and a 50-100 words biography of each author. Please state clearly a) the order of the authors, b) the corresponding author (for multiple authorships) and the contact details of the corresponding author.

While not compulsory, authors can send their self-portrait photos to be included in the article (not more than 1 MB).

3. PUBLICATIONS

Articles will be published on ME-MAG's website (www.me-mag.org) after the editor has reviewed and accepted the article. While without guarantee, we try our best to make a decision within one month after receiving the submission.



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