



Shippers
Council of
Eastern
Africa



IMPACT OF **COVID-19**

ON TRANSPORT &
LOGISTICS SECTOR IN
EAST AFRICA

March
2021



**IMPACT OF COVID-19
ON TRANSPORT &
LOGISTICS SECTOR IN
EAST AFRICA**

March 2021



TABLE OF CONTENTS

ABBREVIATIONS/ ACRONYMS	vi
ACKNOWLEDGEMENT	viii
EXECUTIVE SUMMARY	ix
CHAPTER ONE: INTRODUCTION	1
1.1 Background of the Study	1
1.2 COVID-19 Africa Response	3
1.3 EAC COVID-19 Response Measures	4
1.4 Performance of the Transport and Logistics Sector in EAC Before and After COVID-19	6
1.4.1 Cargo throughput	6
1.4.2 Container traffic	7
1.5 Purpose of the Study	10
1.6 Specific Objectives	10
1.7 Scope of the Study	10
1.8 Limitations of the Study	11
CHAPTER 2:	12
METHODOLOGY AND APPROACH	12
2.1 Introduction	12
2.2 Research Approach	12
2.3 Population of the Study	12
2.4 Sampling Design	12
2.5 Data Collection	15
2.5.1 Phase I – Desk Research	16
2.5.2 Phase II- Online Survey	16
2.5.3 Phase III- Field Study	16
2.6 Data Analysis	17
CHAPTER THREE:	18
RESULTS OF THE STUDY	18
3.1 Introduction	18
3.2 Findings from Desk Research	18
3.2.1 Key COVID-19 Containment Measures Instituted in the EAC – Specific Objective 1	18

3.3 Findings of Online Questionnaires	22
3.3.1 Online Questionnaires Response Rate	22
3.3.2 Overall Impact of COVID-19 on Transport and Logistics Stakeholders	23
3.3.3 Effectiveness of the Regional COVID-10 Policies	23
3.3.4 Effects of COVID-19 Containment Measures	24
3.3.5 Operational Challenges faced due to COVID-19.	25
3.3.6 Business Response to Challenges faced due to COVID-19.	25
3.3.7 Beneficial Measures to be adopted.	26
3.4 Findings from Focus Group Discussions	27
3.4.1 National curfews	27
3.4.2 Partial and total lock down	27
3.4.3 Testing and certificates of conformity of COVID-19 status	28
3.4.4 Online submission of documents	28
3.4.5 Working from home	29
3.4.6 Introduction of port health as a lead agency	29
3.4.7 The Rwandan case	30
3.4.8 Alternative forced transport	30
3.4.9 Switching drivers to move cargo.	31
3.5 Impact of COVID-19 on Transport and Logistics, Time, and Cost Implications	31
3.5.1 Performance	31
3.5.1.1 Port Throughput	31
3.5.1.2 Costs and Rates	36
3.5.1.3 Time (Cargo Dwell Time & Port Truck Turnaround Time)	38
3.5.1.4 Inland Container Depots	41
3.5.1.5 Border Malaba border traffic	44
CHAPTER FOUR:	45
DISCUSSION, CONCLUSIONS AND RECOMMENDATIONS	45
4.1 Discussion	45
4.2 Gaps in the Interventions of EAC Partner States	46
4.3 Operational & Policy Recommendations for Effective Responses to COVID-19 and Future Pandemics	48
4.4 Conclusion	50



REFERENCES	51
ANNEXES	53
Annex 1: Interview Guides	53
SERVICE PROVIDERS E.G. TRANSPORTERS, PORTS OPERATORS.	53
POLICY ADEQUACY AND GAPS	53
GOVERNMENT AGENCIES	54
SERVICE PROVIDERS E.G. TRANSPORTERS, PORTS OPERATORS.	54
POLICY ADEQUACY AND GAPS	55
Annex 2: Questionnaires	56
CLEARING AGENT/FREIGHT FORWARDER SURVEY QUESTIONNAIRE STUDY ON IMPACT OF COVID-19 ON LOGISTICS AND TRANSPORT IN EAST AFRICA	56
TRANSPORTER SURVEY QUESTIONNAIRE STUDY ON IMPACT OF COVID-19 ON LOGISTICS AND TRANSPORT IN EAST AFRICA	61
GOVERNMENT AGENCIES	66
SURVEY QUESTIONNAIRE STUDY ON IMPACT OF COVID-19 ON LOGISTICS AND TRANSPORT IN EAST AFRICA	66



LIST OF TABLES

Table 1: Northern Corridor transport cost and rates during COVID-19 pandemic	8
Table 2: Central Corridor transport costs and rates pre-COVID and during COVID	9
Table 3: Sample Size Distribution	13
Table 4: Key Informant Interview Distribution	14
Table 5: Focus Group Discussions (FGDs)	15
Table 6: Summary of containment measures deployed by each of the EAC Partner States	21
Table 7: Port of Mombasa import by country	34
Table 8: Central Corridor transport costs and rates pre-COVID and during COVID - 2019/2020	35
Table 9: Dar es Salaam port import by country	36
Table 10: Northern Corridor transport cost and rates during COVID-19	37
Table 11: Central Corridor transport costs and rates pre-COVID and during COVID - 2019/2020	38



LIST OF FIGURES

Figure 1: 2019/2020 cargo throughput performance comparative analysis	7
Figure 2: Container traffic (TEUs) performance for the year 2019 and 2020	7
Figure 3: Distribution of online engagements from the EAC Partner States	22
Figure 4: COVID-19 Impact on businesses in the EAC Region	23
Figure 5: Existing Policy's Effectiveness in Addressing the Pandemic	23
Figure 6: Effect of COVID-19 Containment Measures in the EAC Region	24
Figure 7: Main operational challenges faced during COVID-19 in the EAC region	25
Figure 8: Major changes adopted by businesses to mitigate COVID-19 impact.	26
Figure 9: Most Beneficial Eased Measures	26
Figure 10: Port of Mombasa cargo throughput performance - 2019/2020	32
Figure 11: Container traffic (TEUs) performance for the year 2019 and 2020	33
Figure 12: DSM Port total throughput 2019/2020	35
Figure 13: Port of Mombasa cargo dwell time during the pandemic	39
Figure 14: Port of Mombasa truck turnaround time, 2020	40
Figure 15: Ship turnaround time comparison pre-COVID and during COVID	40
Figure 16: ICDN 2020 truck turnaround time	41
Figure 17: ICDN Import Dwell time performance during COVID-19.	42
Figure 18: Delay after customs release at ICDN	43
Figure 19: Verification performance, 2020	43
Figure 20: Average number of trucks handled at Malaba border per day.	44



ABBREVIATIONS/ ACRONYMS

COVID-19	Coronavirus Disease 2019
EAC	East Africa Community
ICD	Inland Container Depot
ICDN	Inland Container Depot- Nairobi
IMF	International Monetary Fund
KPA	Kenya Ports Authority
KRA	Kenya Revenue Authority
KTA	Kenya Transport Association
AERC	Africa Economic Research Consortium
SCEA	Shippers Council of Eastern Africa
FEAFFA	Federation of East African Freight Forwarders Associations
RECDTS	Regional Electronic Cargo and Driver Trucking System
WHO	World Health Organization
OSBP	One Stop Border Post
TEU	Twenty Foot Equivalent Unit
CFS	Container Freight Station
ATNC	Africa Taskforce for Novel Coronavirus
TTTFP	Tripartite Transport and Transit Facilitation Programme
ECOWAS	Economic Community of West African States

ACKNOWLEDGEMENT

We acknowledge all those without who this study would not have been a reality. First and foremost, we wish to thank Africa Economic Research Consortium (AERC) team led by the Executive Director Prof. Njuguna Ndung’u, Anthony Mveyange, Mark Korir, Innocent Matshe, Evar Kiambuthi, Laura Naliaka and Theophile Azomahou. Special appreciation goes to the leadership of the Federation of East African Freight Forwarders Associations (FEAFFA), through the Executive Board led by its President, Mr. Fred Seka and Shippers Council of Eastern Africa (SCEA) Chief Executive Officer, Mr. Gilbert Langat, for allowing the two organizations to partner with AERC on this noble project. Understanding the risk of travelling during the pandemic, we appreciate members of the Transport Working Group- Mr. William Ojonyo, Mr. Agayo Ogambi, Ms. Pauline Nduku, Mr. Elias Rwamanyonyi Baluku and Ms. Anne Kisemba- who went beyond the call of duty to visit different locations across EAC to collect and collate data essential for the development of this report. To those who worked behind the scenes- Ms. Josephine Nyebaza, Ms. Njeri Kenyaggia, Mr. Samuel Mbucho, Mr. Andrew Onionga, Ms. Maureen Mugeni and Mr. Mugambagye Mundaneh, who helped with Rusumo border data at a time when it was difficult for the field team to travel due to lockdown. We cannot forget the practitioners in the transport and logistics sector, major cargo intervenors both from the public and private sector who came through to share their experience during the COVID-19 pandemic. Above all, we wish to thank the Almighty God for enabling the entire team to participate in different capacities without contracting COVID-19 nor any other form of illness that may have disrupted the flow of the program.




EXECUTIVE SUMMARY

The outbreak of the COVID-19 pandemic presented EAC Partner States with monumental challenges that affected different sectors of their economy. As a response, the Partner States instituted measures to mitigate the spread of the virus while, at the same time, ensuring that such measures did not adversely affect the economic wellbeing of their citizens. Specific measures were instituted addressing the Transport and Logistics sector in the region. These measures, however, affected the operations of the sector.

This report presents findings of the study that sought to investigate the impact of the COVID-19 on the Transport and Logistics sector in East Africa. The study addressed five specific objectives, which include:

1. To provide an inventory of the key containment measures instituted by the EAC Partner States to curb the spread of COVID-19 in the transport and logistics sector.
2. To identify and enumerate operational challenges faced by transport and logistics industry stakeholders at the height of the pandemic in the EAC region.
3. To estimate the increase in time, cost, and additional complexities encountered in clearing and forwarding cargo during the pandemic in the region.
4. To establish gaps in the interventions by the EAC Partner States in ensuring the continued flow of cargo across borders during the COVID-19 pandemic.
5. To propose operational and policy measures that could be instituted to make COVID-19 and future pandemic responses.





To address the objectives of this study, a descriptive research design was adopted. The study focused on a population that comprised of various stakeholders in the Transport and Logistics sector including shippers, transporters, clearing and forwarding agents. In terms of the geographical scope, the study focused on key players within the Transport and Logistics sector operating and using the Northern and Central Corridors for movement of cargo and trade facilitation.

The study covers the period between March 2020 and March 2021. Both probability and non-probability techniques were used. Stratified random sampling technique was used to identify respondents for an online survey while judgemental sampling was used in identifying the sector experts for interviews and focus group discussions. Primary and secondary data was gathered and analysed in this study. The study was


carried out through desk study, online questionnaires, field visits, and focused group discussions. For quantitative data, descriptive statistics (frequencies and means) was used while for qualitative data, thematic analysis was adopted. The quantitative data used MS Excel to aid in the analysis. The data was presented by use of tables and figures.

The study found that several key containment measures were adopted by the EAC Partner States. These included: mandatory COVID-19 testing for cargo truck crew; restriction on the number of crew; online submission of cargo related documents; use of rail transport as an alternative; quarantine of crew; fumigation of the port area, truck cabins and containers; adoption of non-intrusive cargo verification; sensitization and awareness creation; suspension of the issuance of new port passes; relay driving (switching of drivers

at the border) escorting cargo; transshipment at borders; isolation of agents and customs officers; designated stopovers for trucks; additional police check points, and; regional electronic cargo driver tracking.

Additionally, the study established that the transport and logistics sector encountered numerous challenges, including increase in border crossing times; increased congestion at the border points; increased road freight rates; increased operational costs for transporters; among others.

In terms of border crossing times, it was observed that the time increased from less than 24 hrs in the first quarter of 2020 (pre-pandemic), to over 5 and 6 days at the Busia and Malaba borders, respectively. In relation to costs, road freight rates increased in the Northern Corridor (Mombasa to Kampala) from US\$2200 to



US\$2500 for a 20/40-foot container whereas rates to Kigali from Mombasa increased from USD 3400 to USD 3800. Due to the delays along the Northern Corridor and especially at the ports of loading and the exit borders, transporters suffered an estimated 48% increase in transport costs. The Central Corridor experienced mixed results regarding the rates. There was a notable decrease in the road transport rate from Dar es Salaam Port to Rwanda (Kigali) from US\$3000 in January to US\$2700, in September, largely attributed to the directive by Rwandan government to have the Inland Container Depot moved from the capital centre to the Rusumo border. The Dar es Salaam Port to (DRC) Goma route however experienced an increase – from US\$4150 in May 2020 to US\$4400 in September 2020. The number of Twenty-foot equivalent units (TEUs) paying penalty for delay after customs release increased

to an all-time high of over 300 TEUs in April and May 2020 at the Inland Container Depot, Nairobi (ICDN).

The study also established gaps in the interventions by the EAC Partner States in ensuring the continued flow of cargo across borders during the COVID-19 pandemic. There was a lack of a coordinated regional approach to COVID-19 measures. Each Partner State instituted their varied interests and interventions, which resulted in delays and congestions at the borders. This was manifested in the disputes noted on the testing, validity, and authentication of the issued COVID-19 certificates. Limited level of professionalism among logistics players slowed the attempt to automate operations by trade facilitation agencies. The region was generally unprepared for the pandemic or similar emergencies as noted, for instance in the institution of unilateral measures

and poor interagency coordination at the national and regional levels.

The study concluded that, despite its negative impacts, the pandemic also unearthed opportunities for innovation and improvement.

For instance, the implementation of non-intrusive measures in the verification process and the online submission of documents reduced the cargo dwell time from seven (7) days to an average of five (5) days at the ICDN. This presented an opportunity for automation and digitalization of customs and trade facilitation systems.

The transport sector emerged as an integral player in the economic development of the region. Rail transport was identified as having the greatest potential to supplement road transport and act as a containment measure since, compared to trucks, rail transport has significantly minimal to no contact with



the public community in which the railroad crosses. The completion of end-to-end rail networks between Mombasa – Malaba – Kampala, Mombasa – Nakuru – Kisumu and Lake Victoria hold a great promise in reducing not only the border challenges but also truck numbers along the Northern Corridor. Similarly, health was identified as important in cross-border trade just as other trade facilitation measures such as efficient transport systems. Stakeholders observed the absence of or existence of weak health facilities along the Northern and Central Corridors, calling

for improvement and establishment of functioning health systems in the corridors.

Regarding policy recommendations, the study demonstrates an urgent need for policy action from the EAC Partner States in various areas to mitigate COVID-19 and future pandemics. These include enhancing digitalization and adoption of ICT in regional transport and logistics (and overall trade), harmonization of regional responses to pandemics and similar crises, development of a regional framework to respond to pandemics, infrastructure

development through the expansion and creation of holding bays at the One-Stop Border Post (OSBPs), enhancing partnership and cooperation amongst regional health agencies and health service providers, expand inter-connectedness of the different modes of transport- railway and roads, which strongly depend on the efficiency of each other, establishment of a regional stimulus fund to respond to support the recovery of the sector and a financial reservoir to respond to future crises, and supporting national and regional efforts to ensure a fully professional logistics industry.

Border crossing times increased from less than 24 hrs to over 5 and 6 days at the Busia and Malaba borders, respectively.



Transporters suffered an estimated 48% increase in transport costs.



Rate from Dar es Salaam Port to Rwanda (Kigali) decreased from US\$3000 in January to US\$2700, in September





CHAPTER ONE: INTRODUCTION


1.1 Background of the Study

The beginning of the year 2020 witnessed an unprecedented global health crisis caused by the Coronavirus Disease 2019 (COVID-19). Outbreaks of the respiratory illness were first reported in Wuhan City, Hubei Province of China (WHO, 2020a). The outbreaks would soon escalate into a health crisis never imagined; unprecedented in terms of contagiousness, fatalities, and global geographical spread affecting all countries leading into a global pandemic. This has resulted in the loss of lives and a multitude of socio-economic consequences with little or no signs of it being abated; what started as a health crisis in one country quickly degenerated into a disaster impacting social and economic aspects of nations.

The COVID-19 has affected all countries across the world since its declaration as a global pandemic by the world health organization (WHO) in March 2020 (WHO, 2020a). At the outset, the pandemic disrupted manufacturing in China – where COVID-19 was first identified – causing a ripple effect throughout global supply chains and resulted in a backlog of containers at ports and travel restrictions that resulted in a shortage of components from China. The shortage of major components usually sourced from China negatively affected manufacturing operations overseas, including in the automotive, electronics, pharmaceuticals, medical equipment, supplies, as well as consumer goods sectors (IFC, 2020). The COVID-19 pandemic has created shocks to trade flows due

to transport and logistics disruptions. Currently, China occupies 60 of world supply and demand, 65 of world manufacturing, and 41 of world manufacturing exports (Baldwin and di Mauro, 2020).

Governments across the world followed WHO recommendations and instituted measures such as lockdowns and border closures that restricted the movement of goods and persons. Additional protocols such as social distancing at warehouses, introduced to ensure the safety of workers, contributed to bottlenecks for freight (World Bank, 2020). Disruptions caused by the pandemic have been felt in other sectors such as travel and tourism, hospitality, and entertainment, with countries that rely on these sectors for their growth most affected.



The exceptional nature of the COVID-19 pandemic resulted in drastic changes with substantial uncertainty about its impact on people's lives and livelihoods. Though epidemiological research has resulted in the development of therapeutics and vaccines, the situation remains uncertain especially as new variants emerge. Many countries now face multiple crises—a health crisis, a financial crisis, and a collapse in commodity prices, which interact in complex ways. Policymakers are providing unprecedented support to individuals, firms, and financial markets. While this is crucial for a strong recovery, there is considerable uncertainty about the post-pandemic landscape (Gopinath, 2020). Transport and logistics remain an integral part of the supply value chain at the regional and international levels. Any disruption to the transport and logistics sector causes adverse effects on trade, socioeconomic development, and overall

sustainability. There is a symbiotic relationship between supply chain performance and revenue, demonstrating the sector's contribution to a country's economic development. In 2020, the World Bank noted operational constraints in both small and top players in the supply chain sector, leading to delivery delays, congestion, and higher freight rates. Due to the insufficiency of a recovery plan, most small players in the transport and logistics sector have been severely hit, leading to the closure of operations. In contrast, top players have resorted to invoking the 'Force Majeure' clause that allows contracts to be declared null and void due to acts of God or other unexpected circumstances—on all their contracts due to COVID-19 (IFC, 2020).

The financial implications of COVID-19 on trade and supply chains are significant. According to the Institute of Shipping Economics and

Logistics (ISL), container throughput index, which measures the number of people and goods that pass-through shipping ports daily, declined from 113.3 in January 2020 to 107.7 in May 2020—a decline of 9.5%. In addition, the International Air Travel Association (IATA) stated that Industry-wide air cargo tonne-kilometres (CTKs) fell by 15.3% year-on-year in the three months to April 2020. Explaining further, cargo volumes plunged but lack of capacity boosted loads and yields. This implies that sea and air cargo transport has been adversely affected by COVID-19. According to the World Bank (2020), due to COVID-19, in 2020 globally, there was an increasing decline in the number of port calls, particularly from container ships. The decline was as a result of by blank sailings, scheduled container services that either did not run at all or did not call at particular ports on a scheduled route, due to insufficient traffic.

1.2 COVID-19 Africa Response

As of mid-April 2020, COVID-19 had firmly set foot in Africa affecting all countries (Medinila et al., 2020) with over 3 million people confirmed to have been infected in the continent. There have been over 117,000 confirmed COVID deaths in the continent (WHO accessed on 18th April 2021). At the onset of the pandemic in February 2020, the African Union (AU) reacted fast to the unfolding pandemic by establishing an Africa Taskforce for Novel Coronavirus (AFTCOR) to oversee preparedness and response towards the virus, ahead of any cases being registered on the continent. The AU eventually adopted a comprehensive three track approach in dealing with the pandemic focusing on:

- i. Surveillance, emergency preparedness, and response
- ii. Continental assistance and joint funding for Member States
- iii. Collective appeal to the international community

Efforts by the AU and recommendations of WHO were quickly replicated across Regional Economic Blocks in the continent. ECOWAS, SADC and EAC undertook measures to augment the WHO and AU recommendations by developing regional responses to the pandemic.

ECOWAS set up a committee of experts for transport, logistics, free movement, and trade in the fight against the pandemic, to firm up guidelines for the harmonization and facilitation of cross border trade and transportation in the region. The experts

provided sectorial technical advice to the statutory decision-making bodies of ECOWAS to ensure uniform and coordinated improvement of the transport and logistics sectors whilst enhancing the growth of intra-regional trade, free movement, and economic growth in the region (ECOWAS 2020).

SADC outlined responses to the pandemic's impacts on trade and transport facilitation in Eastern and Southern Africa region under the EU funded Tripartite Transport and Transit Facilitation Programme (TTTFP 2020).

1.3 EAC COVID-19 Response Measures


In EAC, Rwanda was the fastest to respond, followed almost immediately by Kenya and later by Uganda. The three EAC countries responded swiftly by restricting cross-border movement, limiting flight travel, advocating for social distancing, encouraging washing and sanitization of hands, imposing localized lockdowns, banning local gatherings, and closing of schools. The EAC transport and logistics sector despite being an integral part of the business value chain in the region was not spared the wrath of the COVID-19 pandemic, measures by the various countries to contain the virus led to severe supply chain disruptions never witnessed before. This in turn affected trade facilitation and overall trade performance of business in the region.

In the second quarter of 2020 when the number

of COVID-19 cases among cargo transporters and logisticians increased within the EAC region, Partner States introduced a myriad of additional measures to contain the spread of the virus by the sector. The measures ranged from mandatory testing of truck crew, adoption of online submission of cargo documents, use of rail transport as an alternative, adoption of non-intrusive cargo verification, relay driving, isolation of customs agents and customs officers at border points, among others. The measures were later supplemented with introduction of the Regional Electronic Cargo Driver Tracking System (RECTDS). RECTDS helped to eliminate multiple testing of truck drivers as they moved cargo within the EAC. These measures were deployed alongside initiatives by the private sector such as regional

logistics sector Standard Operating Procedures (SOPs) developed by the Federation of East African Freight Forwarders Associations (FEAFFA) in partnership with TradeMark East Africa.

The measures instituted to control the spread of the pandemic in the EAC region have impacted the efficiency of systems and institutions that provide services to the transport and logistics sector. For instance, limitations in access to and use of technology, by public and private stakeholders in the transportation and logistics sector, disrupted operations of most border posts when states directed that organizations implement work from home measures. The result was increased delays at the ports, inland container depots (ICD), and One-Stop Border Posts (OSBPs). Furthermore, it also impacted the evacuation of containers and empties,



which coupled with higher truck turnaround time, consequently raised the base cost for transporters and shippers.

The East African transport and logistics industry has witnessed a drastic shift in its mechanisms of collecting and sharing vital information following the associated impacts of the pandemic.

Before the pandemic, the mechanisms for collecting, recording, and sharing information in the region were inefficient. There was no platform for sharing driver and vehicle and movement information, and most importantly, there was a lack of harmonized policies, laws, and standards regulating cross-border road transport. The deployment of the regional cargo tracking system that relays driver, vehicle, and trip information, and the introduction of the requirements to share driver COVID-19 test results daily and to monitor the wellness status of truck drivers and truck movements has

revolutionized information sharing in the industry.

Undeniably, transport and logistics operators in the region were unprepared for COVID-19 or any pandemic, which raises pertinent questions. These include: (i) whether there are policies in place to mitigate disasters like COVID-19, or (ii) what can we learn from the COVID 19 pandemic in mitigating the challenges being faced in the transport and logistics sector in the future?

As of mid-April 2020, over 3 million cases of COVID-19 and more than 100,000 related deaths had been reported in Africa, according to WHO data. At the onset of the pandemic in February 2020, the African Union (AU) reacted by establishing an Africa Taskforce for Novel Coronavirus (AFTCOR) to oversee preparedness and response towards the virus, ahead of any cases being registered on the continent. The AU eventually adopted a comprehensive three-track

approach in dealing with the pandemic focusing on: (i) Surveillance, emergency preparedness, and response, (ii) Continental assistance and joint funding for the Member States, and (iii) Collective appeal to the international community.

Efforts by the AU and recommendations of WHO was quickly replicated across Regional Economic Blocks in the continent. In West Africa, the Economic Community of West African States (ECOWAS) set up a committee of experts for transport, logistics, free movement, and trade in the fight against the pandemic, to firm up guidelines for the harmonization and facilitation of cross border trade and transportation in the region. The experts provided sectorial technical advice to the statutory decision-making bodies of ECOWAS to ensure uniform and coordinated improvement of the transport and logistics sectors whilst enhancing



the growth of intra-regional trade, free movement, and economic growth in the region. In Southern Africa, the Southern African Development Community (SADC) outlined responses to the pandemic's impacts on trade and transport facilitation in the Eastern and Southern Africa region under the EU-funded Tripartite Transport and Transit Facilitation Programme (TTTFP).

In East Africa, in the second quarter of 2020, the EAC published administrative guidelines to facilitate the movement of goods and services during the pandemic within the region (EAC, 2020). Three EAC countries – Rwanda, Kenya, and Uganda - responded swiftly by restricting cross-border movement, limiting flight travel, advocating for social distancing, encouraging recommended hygiene (hand washing and sanitization), imposing localized lockdowns, restricting social gatherings,

and closing of schools. EAC Partner States also introduced a myriad of additional measures to contain the spread of the virus in the transport and logistics sector.

These ranged from mandatory testing of the truck crew, adoption of online submission of cargo documents, use of rail transport as an alternative, adoption of non-intrusive cargo verification, relay driving, isolation of customs agents and customs officers at border points, among others. The measures were later supplemented with the introduction of the Regional Electronic Cargo Driver Tracking System (RECTDS). The RECTDS helped to eliminate multiple testing of truck drivers as they moved cargo within the region. These measures were deployed alongside initiatives by the private sector such as regional logistics sector Standard Operating Procedures (SOPs) developed by the Federation

of East African Freight Forwarders Associations (FEAFFA) in partnership with TradeMark East Africa (TMEA).

1.4 Performance of the Transport and Logistics Sector in EAC Before and After COVID-19

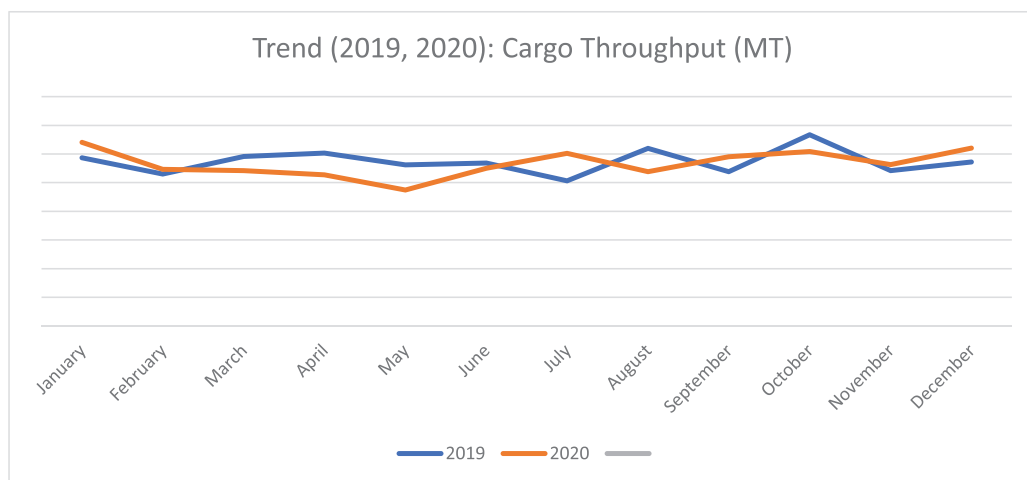
This section provides a brief comparison of the general sector performance and the impact the pandemic has had on the transport and logistics sector by assessing cargo throughput, container traffic and costs and rates along the northern and central corridors before and after the pandemic.

1.4.1 Cargo throughput

In terms of cargo throughput as shown by the chart below, the study revealed that the Port of Mombasa, which serves the Northern Corridor witnessed a major decrease in the total number of cargo handled at the Port from a projection of 35.9 million tons in total throughput and

1.49 million Twenty-foot Equivalent Unit (TEUs) in container traffic to 34million tons and 1.358 million TEUs.

Figure 1: 2019/2020 cargo throughput performance comparative analysis

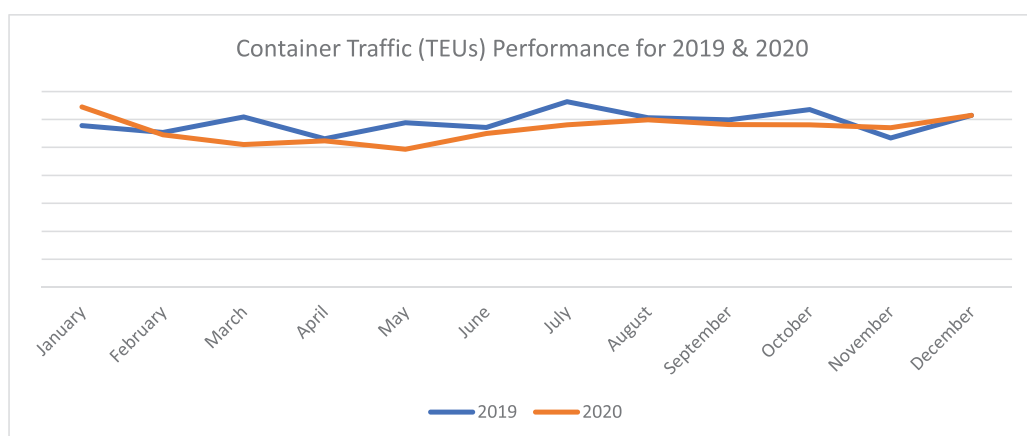


Source: Port of Mombasa and Northern Corridor Community Charter reports

1.4.2 Container traffic

Further as shown by the chart below, the Port of Mombasa also registered a 4% reduction in container traffic in 2020.

Figure 2: Container traffic (TEUs) performance for the year 2019 and 2020



Source: Port of Mombasa and Northern Corridor Community Charter reports

Table 1: Northern Corridor transport cost and rates during COVID-19 pandemic

Route	Pre COVID-Rates (USD)	Rates (March-June 2021)	Pre COVID-Average Transit Time (In Days)	Average Transit Time (March - June 2021)	Extra Costs - USD 200 Per Day
Mombasa -Kampala	2100	2500	2-4	7-9	\$1000
Mombasa - Kigali	3400	3800	7-8	14-16	\$1400
Mombasa - South Sudan	3600	4500	9-10	21- 26	\$2800
Mombasa -Bujumbura			9 – 10	19-20	\$2000
Mombasa – DRC	5000	6000	20-21	30-45	\$3400
Nairobi -Zambia	6000	7000	10-12	30-32	\$4000

Source: KTA, 2021

The number of containers cleared within the 4-day free period declined drastically at the Inland Container Depot, Nairobi (ICDN). Subsequently, about 60% of cargo cleared through the ICDN incurred storage charges amounting to an average of KES 9m to 11Million in storage charges weekly (SCEA, 2020).

The trend at the Port of Dar es Salaam is slightly different. The Port throughput was 11,596,225 tons in 2020 for the period between January to September, higher by 4939 tons margin compared to 2019 for the period under review. The trend remained similar for the cost of transport in the Central Corridor, which is served by

the Port of Dar es salaam. There was a slight reduction in rates - the average cost from Dar es Salaam port to Kigali reduced to \$2800 in 2020 from \$2867 in 2019, Dar to Bujumbura reduced from \$3,067 to \$2,978 while the cost from Dar to Bukavu went down from \$4,900 to \$4,856.

The Port throughput was 11,596,225 tons in 2020 for the period between January to September, higher by 4939 tons margin compared to 2019 for the period under review.

Table 2: Central Corridor transport costs and rates pre-COVID and during COVID

Route	Dar-Kigali		Dar-Bujumbura		Dar- Kampala		Dar-Bukavu		Dar-Goma	
	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020
JAN	\$3,000	\$2,900	\$3,200	\$3,100	\$3,200	\$3,200	\$4,900	\$4,900	\$4,300	\$4,300
FEB	\$2,900	\$2,900	\$3,200	\$3,100	\$3,200	\$3,200	\$4,900	\$4,900	\$4,300	\$4,300
MAR	\$2,900	\$2,900	\$3,000	\$2,800	\$3,200	\$3,200	\$4,800	\$4,800	\$4,200	\$4,300
APR	\$2,800	\$2,800	\$3,000	\$2,900	\$3,300	\$3,500	\$4,800	\$4,600	\$4,100	\$4,100
MAY	\$2,800	\$2,800	\$3,000	\$2,800	\$3,200	\$3,500	\$4,800	\$4,600	\$4,100	\$4,000
JUN	\$2,800	\$2,800	\$3,000	\$3,100	\$3,300	\$3,400	\$4,900	\$4,900	\$4,150	\$4,400
JUL	\$2,800	\$2,700	\$3,000	\$3,000	\$3,300	\$3,400	\$5,100	\$4,900	\$4,150	\$4,300
AUG	\$2,900	\$2,700	\$3,000	\$3,000	\$3,300	\$3,300	\$5,000	\$5,000	\$4,200	\$4,400
SEP	\$2,900	\$2,700	\$3,200	\$3,000	\$3,300	\$3,300	\$4,900	\$5,100	\$4,200	\$4,400
AVG	\$2,867	\$2,800	\$3,067	\$2,978	\$3,256	\$3,333	\$4,900	\$4,856	\$4,189	\$4,278

Source: Central Corridor, Dar es Salaam Port, 2020

There have also been some positive changes occasioned by the prevailing pandemic situation; the transport and logistics industry has witnessed a drastic shift in its mechanisms of collecting and sharing vital information following the increased cost of doing business and extended travel times due to increased delays at border posts and checkpoints while drivers undergo COVID-19 screening, testing and mandatory quarantine, and consequently, delays in delivering essential goods and services among other products.

Before the pandemic, there were ineffective information recording and sharing mechanisms. Additionally, there was no platform to share driver, vehicle, and movement information and most importantly, there was a lack of harmonized policies, laws, and standards for cross border road transport. Currently, the deployment of the regional cargo tracking system that relays driver, vehicle and trip information, and the introduction of the requirements to share drivers' COVID-19 test results daily and to monitor the wellness status of truck drivers and truck movements

has revolutionized information sharing in the industry (TTTFP, 2020).

This report analyses the specific impact of the COVID-19 pandemic on the transport and logistics industry of the EAC region. The report also provides an opportunity to not only to raise awareness to the economic impacts of the pandemic at a regional level but also analyse the mitigative measures adopted by the various EAC governments and their overall impact of the transport and logistics sector during this pandemic period.



1.5 Purpose of the Study

The purpose of this study was to determine the impact of COVID-19 on the transport and logistics sector in the East Africa region and recommend policy measures for containing pandemics without disrupting transport and supply chain logistics in the region.

1.6 Specific Objectives

The specific objectives were:

1. To provide an inventory of the key containment measures instituted by the EAC Partner States to curb the spread of COVID-19 in the transport and logistics sector.
2. To identify and enumerate operational challenges faced by transport and logistics industry stakeholders at the height of the pandemic in the EAC region.
3. To estimate the increase in time, cost, and additional complexities encountered in clearing and forwarding cargo during the pandemic in the region.
4. To establish gaps in the interventions by the EAC Partner States in ensuring the continued flow of cargo across borders during the COVID-19 pandemic.
5. To propose operational and policy measures that could be instituted to make COVID-19 and future pandemic responses more effective.



1.7 Scope of the Study

The study is limited to the EAC, which is served majorly by two corridors: The Central and the Northern Corridors. The Northern Corridor originates at the Port of Mombasa in Kenya and boasts of a road network covering approximately 12,707 km distributed as follows: 1,323.6 km in Kenya, 2,072 km in Uganda, 1,039.4 km in Rwanda, 567 km in Burundi, 4,162 km in DRC, and 3,543 km in South Sudan. On the other hand, the Central Corridor originates from Dar es Salaam Port through the United Republic of Tanzania to Burundi and Rwanda at Rusumo border post and Uganda at Mutukula border post. The Corridor continues to Goma in DRC and Bukavu through Rwanda. These two corridors facilitate trade for the Eastern and Central African regions, making their performance efficiency vital to the transport and logistics sector.

The study narrowed down to key border crossings and strategic regional entry points such as Rusumo, the busiest border crossing on the Central Corridor within East Africa, Malaba and Busia borders, the main transit entry points on the Northern Corridor, and Namanga border point between Tanzania and Kenya, which experienced operational challenges at the peak of COVID crisis.

The study also incorporated Naivasha Inland Container Depot, seen as a relief facility to challenges that were encountered using road transport and its unique position of being accessible through the Standard Gauge Railway (SGR) and Meter Gauge Railway (MGR). The study was further extended to cover Inland Container Depot- Nairobi.

1.8 Limitations of the Study

The study was conducted at the peak of the pandemic, during which COVID-19 containment measures were in place. The restrictions of movement limited accessibility to a wide range of applicants. Stakeholders in some countries could not be reached due to travel restrictions and other lockdown measures, for instance, Rwanda. To minimize physical contact and to maximize on the limited time, mobilization was conducted through private sector associations to fill in online questionnaires. Some participants, especially from the private sector were sceptical that study findings would be implemented or bring any changes and were

adamant to participate. To overcome scepticism by the private sector, stakeholders were assured that it is in the best interest of FEAFFA and Shippers Council to see that the challenges and adverse effects of COVID-19 are addressed thus ensuring continuity in the movement of goods across East Africa. Participants were also reminded that it is in their best interest to participate in providing feedback that will be crucial in designing effective regional responses to crises such as COVID-19 and ensure operational continuity. The study also faced time limitations, as there was limited time to engage more participants and appreciate existing challenges or their concerns.





CHAPTER TWO: METHODOLOGY AND APPROACH

2.1 Introduction

This chapter presents the methodology that was used in the study. It describes the population of interest, the sampling design, data collection procedures and finally the data analysis technique that was adopted.

2.2 Research Approach

A participatory approach was used that involved all the key players in the transport and logistics sector. This was to ensure a complete and concise information gathering from the different sector players. On the other hand, triangulation in data collection and analysis was adopted. This was to guard the authenticity, validity, and reliability of the data collection process.

2.3 Population of the Study

The population of the study comprised of different sector stakeholders. The population was derived from the membership of different sector players. Specifically, the clearing and forwarding associations in the region, the transporters associations and the shippers councils associations provided the population elements from their membership. To qualify as a respondent, the clearing agents, transporters, and cargo owners were required to be actively involved in the international trade involving the movement of cargo along the Northern and Central Corridors.

As such, not all members of these associations were used as some were

either inactive because of COVID-19 and had scaled down their operations and were therefore semi-dormant or had altogether changed their business models.

2.4 Sampling Design

Based on the nature of the population, both probability and non-probability sampling techniques were adopted. For transporters, clearing agents and cargo owners, a stratified random sampling was used. Stratification was based on the sector and random sampling within the sector. This was adopted to ensure a representation of the all the key sectors affected by COVID-19 within the transport and logistics. For other sector key informants, non-probability sampling



methods were used. This was based on the fact that for some specific information sector experts were better appraised to respond to some of the objectives other than the general respondent's groups. As such, to ensure expert views were collected, purposeful sampling technique was adopted. The respondents were purposely selected as they had specific information that was required for the study. The key informants selected for interviewing were again distributed

in the different sector of interest including clearing, transportation, and cargo owners. Regarding Focused Group Discussions (FGD), participants were recruited based on their involvement either in transport, clearing and forwarding sectors.

For the survey, a sample size of 160 respondents from the region was used. The chosen sample size was determined as ideal to represent the three sector player groups adequately in the region. Due to the

nature of the sector, more representation was derived from the clearing agents (58.7%) as they interacted more with different facets of the logistics chain from the source of the cargo to destination. The clearing and forwarding agents also, in some instances, managed transport services and represented the cargo owners in the process. The table below indicates the sample size for each category of respondents.

Table 3: Sample Size Distribution

Sector	Sample Size	Percent
Transporters	36	22.5
Clearing Agents	94	58.7
Cargo Owners	30	18.8
Total	160	100

For qualitative research, the study selected about 15 key informants to interview. These were experts representing different aspects of the sector. As a qualification condition, the key informants were expected to have wide knowledge and expertise on transport and logistic in the region, with an emphasis on both the Northern and Central Corridors. Major transport operators who

had a wide knowledge of operating in the region were interviewed including officials of the transport associations.

For the clearing and forwarding, agents who were involved in cross border businesses and who had detailed knowledge of operations as well as involvement in ensuring that there was a coordinated effort in the region towards

the movement of cargo were interviewed. Again, major cargo owners in the region who depended on the Ports of Mombasa and Dar es salaam were interviewed.

To ensure a governmental view, three interviews were also held with representatives of government agencies. The table below indicates key informant interview distribution.

Table 4: Key Informant Interview Distribution

Sector	No
Transport	4
Clearing Agents	5
Cargo Owners	3
Government Agencies	3
Total	15

In addition to the key informant interviews, FGDs were held across different ports and posts in the transport and logistics industry, representing sea ports, inland ports and

border posts. The Border posts included Malaba, Busia and Namanga. The Naivasha and Nairobi Inland Container Depots (ICD) were also used in the FGD. For Sea ports, an FGD was conducted in

Mombasa. A total of 16 FGDs were conducted with each FGD having an average of 15 participants. The FGDs had mixed participants representing different sector players including

clearing agents, revenue/customs representatives (Kenya, Uganda, Tanzania), transporters, logistics companies, trade facilitation agencies, various government agents represented at the ports and border posts as well as representatives of cargo owners.

At the border points, two FGDs were conducted, one from each side of the border. While it was desirous to conduct the FGDs and interviews on all border points in the Northern and Central Corridors, restriction/cessation of movements in the region as a result of COVID-19 made it difficult to access some

of the data and information gathering points. However, during the recruitment of FGD and key informants, there was a deliberate attempt to select individuals who had operations in both the corridors and thus a clear understanding of what was happening. The table below indicates the distribution of the FGDs.

Table 5: Focus Group Discussions (FGDs)

Border Point	Number of FGDs
Malaba	3
Busia	3
Mombasa	3
ICD Naivasha	2
Namanga	3
ICD Nairobi	2
Total	15

2.5 Data Collection

Both primary and secondary data was collected for this study. Questionnaires and interview guides were used to collect primary data. For secondary data, information gathering checklist was developed to aid the process.

2.5.1 Phase I – Desk Research

This phase involved a collection and analysis of secondary data. The review captured existing regulatory and policy documents and data including, but not limited to Mombasa Community Port Charter and the Northern Corridor Transport Observatory reports. For the purpose of the study, secondary data was collected to address several specific objectives based on several report key being as indicated below:

- FEAFFA Regional COVID-19 Standard Operating Procedures (SOPs)
- FEAFFA and SCEA Reports on COVID-19 in the Sector
- COVID-19 Guidelines issued by the WHO and the respective Ministry of Health in the EAC region
- The East Africa Community Administrative

Guidelines to Facilitate Movement of Goods and Service During the COVID-19 Pandemic

- EAC COVID-19 Response Plan
- COVID-19 Guidelines issued by the Ministry of Health of the respective countries in East Africa including Burundi, Kenya Rwanda, Uganda, and Tanzania.
- Transport sector specific COVID-19 Guidelines issued by the Ministry of Transport in the respective countries in East Africa.
- EABC Report: Impact of COVID-19 on EAC Transport & Logistics Sector.

2.5.2 Phase II - Online Survey

An online survey was conducted using questionnaires to gather primary data from logistics sector players comprising of the cargo owners, clearing agents and transporters across the EAC region.

The online questionnaires developed had both open and close ended questions. The questionnaires also had Likert scale questions with a scale of 1 to 5. The questionnaires were disseminated through platforms for data collection. Respondents were mobilized through the FEAFFA National Associations, transporters associations, Shippers Council of Eastern Africa, and Kenya Association of Manufacturers, amongst other associations.

2.5.3 Phase III - Field Study

Primary data from questionnaires was complemented with key stakeholder engagements in the form of key informant interviews and FGDs.

These targeted transporters, freight forwarders, customs agents, warehouse operators, Container Freight Stations (CFSs), shippers, ports, Inland Container Depots, standard bureaus,



custom administrations, and other trade facilitation agencies in the EAC region. Information from these engagements provided a qualitative aspect to the study and corroborated information gathered through the questionnaire. An interview guide was used to aid in the data collection exercise.

To achieve the objectives of the study, FGD approach was employed concurrently with other methods as outlined within the methodology. This is a qualitative research method and data collection technique in which a selected group of people discuss a given topic in-depth, facilitated by a professional external moderator. This

method serves to solicit participant attitudes and perceptions, knowledge, experience, and practices shared during interaction with other members. FGD helps identify and clarify shared knowledge among different groups.

Under FGD, to investigate the impact of COVID-19 in the transport and Logistics sector in East Africa, participants were drawn from the following stakeholders: Border points (Malaba, Busia, Namanga), revenue authorities (Kenya Revenue Authority, Tanzania Revenue Authority, Ugandan Revenue Authority, Rwanda Revenue Authority), and government agencies such as KENTRADE, KEPHIS,

immigration officers, port health and standard bureaus. Associations such as transporters, freight forwarders and manufacturers were also involved in the study.

2.6 Data Analysis

Once data was collected, it went through a data preparation process including editing, coding, transcribing, and cleaning. Data was analysed using descriptive statistics such as frequencies and percentages. The data was analysed using Microsoft Excel tool. Data was presented by use of tables and figures.





CHAPTER THREE: RESULTS OF THE STUDY

3.1 Introduction

This section presents the findings of the study on the impact of COVID-19 on the transport and logistics sector in East Africa. The findings are aligned to the assignment objectives, with a focus on the three main phases of the research that were employed during data collection. First, results from desk research are presented, followed by results of online surveys while focus group discussions are presented last.

3.2 Findings from Desk Research


The desk research analysed accessible secondary data, including existing regulatory and policy documents to determine the containment measures adopted by governments to control COVID-19 (Objective 1).

3.2.1 Key COVID-19 Containment Measures Instituted in the EAC – Specific Objective 1

As indicated before, to address Specific Objective 1 on containment measures instituted in the region, a document review was undertaken. The review identified various measures, largely guided, and aligned to global best practices as dictated the World Health Organization (WHO).

The WHO issued guidelines for containing COVID-19 (WHO, 2020a; WHO, 2020b; WHO, 2020c) which all countries including the EAC Partner States domesticated. The guidelines mainly emphasized frequent washing of hands with an alcohol-based hand sanitizer or soap and water, maintaining social distance, avoiding touching eyes,

nose, ears, and mouth, and practicing respiratory hygiene. Considering the need to facilitate the free movement of goods and services in the region, the EAC developed Administrative Guidelines aimed at complementing the national measures and ensuring the smooth and uninterrupted movement of goods and services while mitigating the negative impact of COVID-19 (EAC, 2020). When the number of COVID cases among cargo transporters and logisticians increased in the second quarter of 2020, Partner States introduced additional measures to control the spread of the virus in the transport and logistics sector (MOH Burundi, 2021; MOH Kenya, 2021; MOH Uganda, 2021; MOH Tanzania, 2021; MOH Rwanda, 2021). Discussed below are the containment measures by the EAC Partner States.

- 
- a. Mandatory COVID-19 testing for cargo truck crew:** To facilitate the movement of cargo by trucks, governments required all drivers to have valid COVID-19 free certificates. The test certificates were valid for 14 days. Testing facilities had to be set up such that drivers test at the points of loading and hold negative COVID-19 certificates as a prerequisite to enter another country.
 - b. Restriction on the number of crew:** To encourage social distancing among crew members, the number of crew per truck was restricted to not more than two (and in some countries three) including the driver.
 - c. Enhanced online submission of cargo-related documents to government agencies:** This was set up to minimize unnecessary human interaction. Most cargo clearance processes became automated, and communication was channeled via emails.
 - d. Use of Railway as an Alternative to Road:** On the Northern Corridor, the use of railway up to Naivasha ICD as an alternative to road transport for transit cargo destined to Uganda, Rwanda, South Sudan, and DRC in Kenya was adopted. This reduced the distance within which truck drivers interacted with communities along the corridor.
 - e. Increased non-intrusive verification of cargo by government agencies.** At the ICD in Nairobi, the number of people involved in physical verification was reduced to two (2) people for a 20ft container and three (3) people for a 40ft container. Private sector was also encouraged to do the same.
 - f. Suspension of issuance of new port passes:** This was implemented to limit the number of people accessing the port.
 - g. Relay driving – switching drivers at borders.** This was deployed at some borders such as Busia, Namanga, and Rusumo. It involved drivers exchanging trucks at the borders so that truck drivers who have not tested for COVID-19 do not cross into another country.

- h. **Transshipment at borders:** Involved trucks offloading cargo at a dry port established at the border to minimize crossing of borders by untested drivers from a Partner State. Cargo would be picked by local trucks to the destination.
 - i. **Escorting Cargo in convoys:** Deployed at Rusumo to ensure truck drivers do not deviate from the designated routes and, therefore, interact with communities along the corridors. These meant trucks were made to wait and build enough before the convoy sets off. The trucks had designated areas for stopovers along the transit routes to avoid the crew mixing with the public.
 - j. **Checkpoints:** Additional police check points to monitor adherence to the SOPs by truck drivers.
 - k. **Isolation of agents and customs officers from the community:** This involved isolation of private and public sector officials at borders to minimize their interaction with people in their homes and the communities as they facilitate movement of cargo through borders.
 - l. **Quarantine and Isolation:** Authorities quarantined and isolated truck drivers who were contacts of positive cases. Quarantine and isolation were also deployed for all crew before the release of the COVID-19 test results and/or at borders where there were no arrangements for relay drivers or transshipment.
 - m. **Enhanced cleaning:** Routine fumigation of the port area, truck cabins, and containers.
 - n. **Deployment of the Regional Electronic Cargo and Truck Driver Tracking System:** To track driver and cargo movements.
- In analysing the containment measures, it was found out that not all countries had the same measures in the region. Kenya, Uganda, and Rwanda had developed and implemented most of the identified containment measures and as aligned to the EAC Administrative procedures on the easing of movement of goods and people in the region.

On the other hand, Burundi, Tanzania, and South Sudan had instituted fewer measures compared to the other countries as indicated in the table below.

Table 6: Summary of containment measures deployed by each of the EAC Partner States

	Containment Measure	Country					
		Burundi	Kenya	Rwanda	South Sudan	Tanzania	Uganda
1	Mandatory COVID-19 Testing for cargo truck crew	X	X	X	X		X
2	Restriction on the number of crew		X	X			X
3	Online submission of cargo related documents	X	X	X	x	X	X
4	Use of rail transport as an alternative		X				
5	Quarantine of crew		X	X			X
6	Fumigation of the port area, truck cabins and containers		X	X		X	X
7	Adoption of nonintrusive cargo verification		X	X		X	X
8	Sensitization and awareness creation	X	X	X	x		X
9	Suspension of the issuance of new port passes		X				
10	Relay driving (Switching of drivers at the border)		X	X			X
11	Escorting Cargo			X			
12	Transshipment at borders			X			
13	Isolation of agents and customs officers			X			
14	Designated stopovers for trucks		X			X	X
15	Additional police check points	X	X	X	x	x	X
16	Regional electronic cargo driver tracking	X	X	X	x	x	X
	No. of Measures identified and Instituted	5	13	13	5	6	11
	Percentage of identified measures	31	81	81	31	36	69

3.3 Findings of Online Questionnaires

3.3.1 Online Questionnaires Response Rate

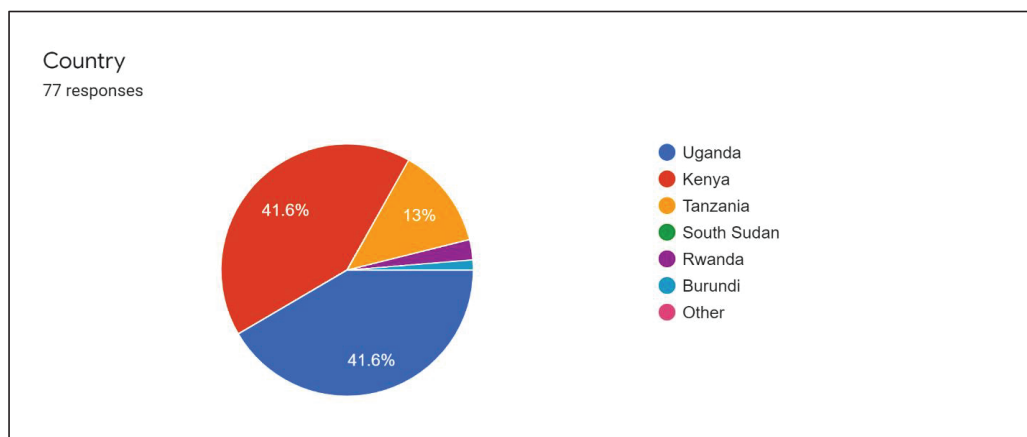
A total of 160 questionnaires were disseminated targeting cargo owners, transporters, and clearing agents in the East African region. In total 77 responses were received, with most respondents from Kenya (41.6%) and Uganda (41.6%) (Figure 3). There was no response from South Sudan. Despite concerted efforts and follow ups, the targeted

respondents from South Sudan failed to participate. The probable reason for the non-participation could be attributed to technological issues as the survey was administered online.

On the other hand, a lack of perceived benefits in participation in the study could have contributed to the non-response. There is also a nascent challenge in transport and logistics sector player’s coordination through associations in South Sudan and thus limiting the role of such associations in prevailing

among their members to participate in the study. The lack of participation by South Sudan does not in any way threaten the regional coverage and perspective of the study as most of the transport, clearing and forwarding services are provided by players in Kenya and Uganda who were sufficiently covered in the study. The response is therefore largely considered to be representative as it provided a sufficient coverage of both the Northern and Central Corridors.

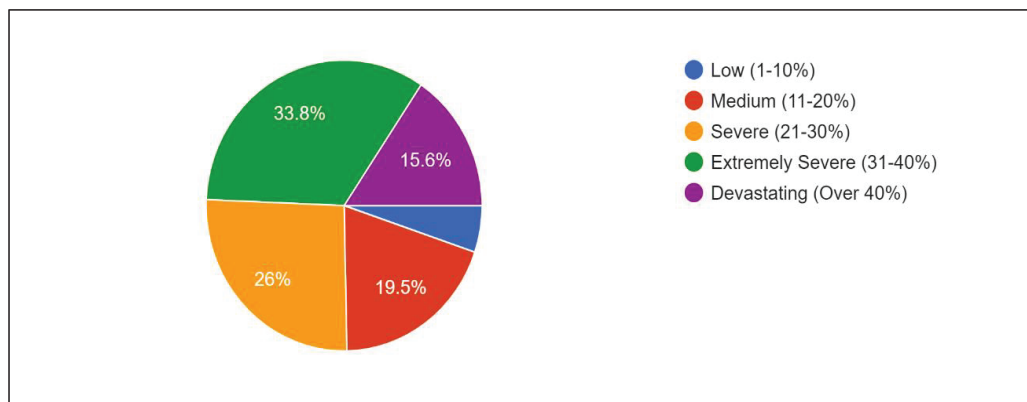
Figure 3: Distribution of online engagements from the EAC Partner States



3.3.2 Overall Impact of COVID-19 on Transport and Logistics Stakeholders

More than 75% of the transport and logistics businesses in East Africa were significantly affected by the pandemic, with 16% of the respondents reporting the impact to be devastating and 34% experiencing extremely severe impact. This information is presented in figure below.

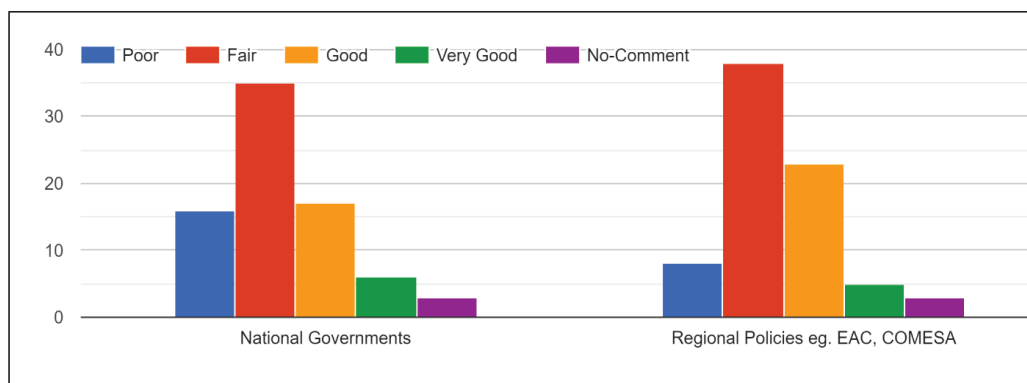
Figure 4: COVID-19 Impact on businesses in the EAC Region



3.3.3 Effectiveness of the Regional COVID-10 Policies

The transport and logistics industry believed that the existing national and regional policies were not effective in addressing the pandemic. Respondents rated national government policies fair at 35% compared to regional policies at 38%. This information is presented in Figure below.

Figure 5: Existing Policy's Effectiveness in Addressing the Pandemic



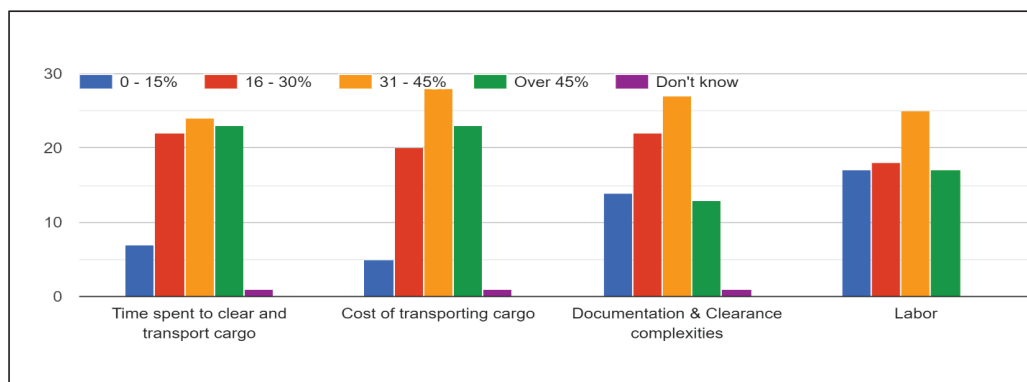
3.3.4 Effects of COVID-19 Containment Measures

COVID-19 containment measures had increased the time, cost, documentation, and labour costs. About 62% of transport and logistics players estimated that clearance time had increased by more than

30%. More than 67% also estimated that the cost of transport had increased by more than 30%. Majority of the players also indicated that there was marked increase

in documentation and clearance complexities because of COVID-19. There was also some noted increase in labour costs as a result of the pandemic. Table 6 below details the findings.

Figure 6: Effect of COVID-19 Containment Measures in the EAC Region



Additionally, it was found that the containment measures spread operational difficulties across the transport sector, resulting

in a significant impact in dispensing of duties, service delivery, and the expected outcomes.

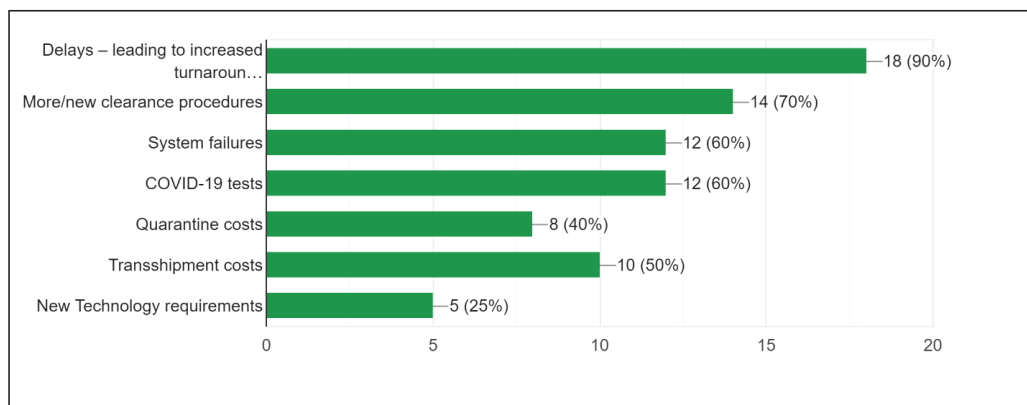
3.3.5 Operational Challenges faced due to COVID-19.

In terms of challenges because of COVID-19 in the region, several operational challenges were identified. According to 90% of the players, the sector experienced delays leading to increasing turnaround time. About 70% of the

respondent identified the second most operational challenge as the emergence of more and new clearance procedures. Systems failure issues were identified by about 60% of the respondents as contributing to the operational

challenges. Similarly, another 60% identified COVID-19 test-related issues as a major contributor to the operational challenges. Other factors identified as contributing to operational challenges are provided in Figure 7 below.

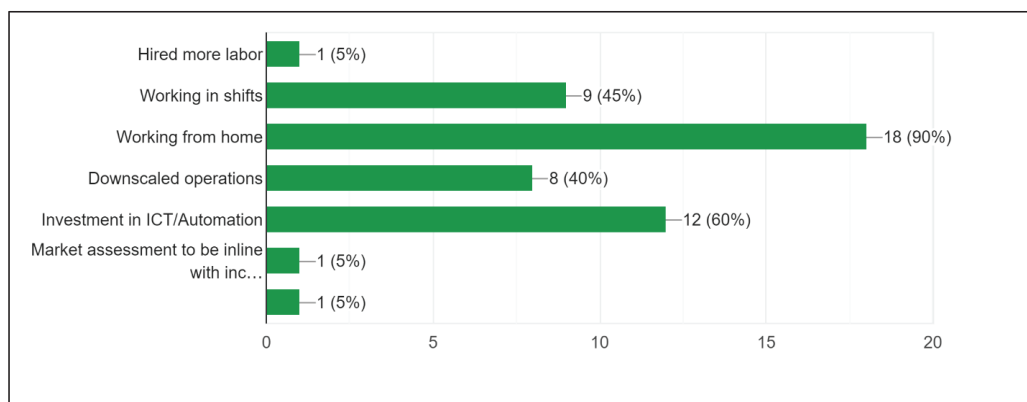
Figure 7: Main operational challenges faced during COVID-19 in the EAC region



3.3.6 Business Response to Challenges faced due to COVID-19.

Nearly all transport and logistics businesses (98.7%) made changes to their operations to mitigate the impact of the pandemic. About 45% started working in shifts, 90% started working from home, 40% downscaled operations whilst 60% increased investment in technology (figure 8).

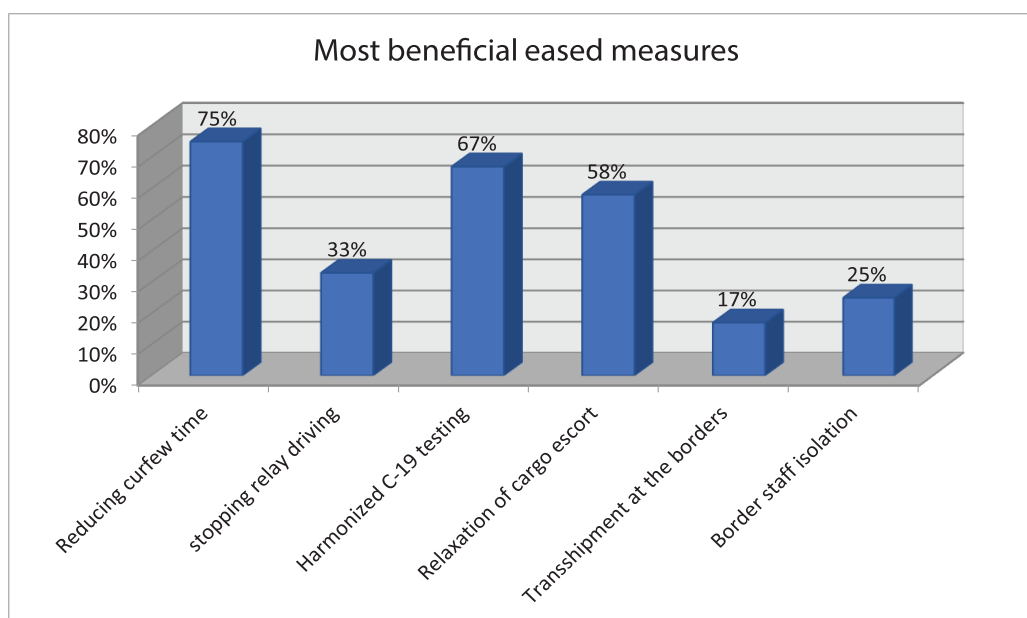
Figure 8: Major changes adopted by businesses to mitigate COVID-19 impact.



3.3.7 Beneficial Measures to be adopted.

Reducing curfew time was considered the most beneficial of the eased containment measures, rated at 75%, followed by harmonized COVID-19 testing (67%) and relaxation of cargo escort (58%) (figure 9).

Figure 9: Most Beneficial Eased Measures



3.4 Findings from Focus Group Discussions

The focused group discussions, together with the online surveys sought to determine and enumerate the operational challenges on the transport and logistics sector in the EAC because of the containment measures to curb the spread of the COVID-19 pandemic. The results indicate that some of the EAC Partner States including Kenya, Uganda, and Rwanda instituted unique and varied measures in line with the WHO guidelines to mitigate the spread of the pandemic, which had a ripple effect on the operations of transport and logistics.

The main players in the transport and logistics sector include but are not limited to customs agents who declare shipments on behalf of the importers or exporters, customs administrations

under the revenue authorities who audit the customs agents' declarations and facilitate the processing of documents, importers from whom all originating documents are obtained from by the customs agents, other government agencies for standardization and enforcement of trade facilitation across the region. Given the above, the containment measures resulted in operational challenges that generally increased the turnaround time, cargo dwell time, and increased cost of transport. The main operational challenges include but are not limited to the following:

3.4.1 National curfews

Most Partner States adopted curfews restricting the movement of goods and services. This directly meant that the gains that had been

made on 24-hour service provision at the ports and the borders were reduced. Participants noted that productive man-hours were limited thus increasing the time taken to move cargo and at the same time handling and the clearance points. For example, in Kenya, whereas the ports were presumed to work 24 hours, the banks closed at 3 pm, the shipping lines stopped operations in the afternoons and customs agents vacated the port areas latest at 4.00 pm to comply with government curfew mandates. At the border of Namanga, while Kenya followed WHO recommendations to control COVID-19, Tanzania did not. This affected border crossing between the two countries.

3.4.2 Partial and total lock down

Some Partner States instituted partial lockdowns¹ and or total lockdowns² creating a challenge in moving from one part of the country to the other and/or one country to the other without special clearance from the authorities. This created a challenge for, among other things, supervision and delivery of services which reduced efficiency and the turnaround time. Participants noted that before the pandemic, trucks from Mombasa to Kampala would make 4 round trips per month, but this reduced to an average of 1 to 2 round trips in the same period during the second quarter of 2020.

¹ Partial lockdown is a measure taken by a government to restrict movement of people and goods into and out of specific regions of a country to contain the spread of a pandemic.

² Total Lockdown is a measure taken by a government during an emergency to prevent people from leaving or entering a country to contain the spread of a pandemic.

Some truck drivers were also afraid of harassment by law enforcement officers who were not able to differentiate between essential service providers and other general service providers. This impacted the discharge of their duties, alongside the enhanced protocols in the transport and logistics sector.

3.4.3 Testing and certificates of conformity of COVID-19 status


Truck drivers were categorized as high risk in the spread of the COVID-19 pandemic across the region even though their services remained vital. Many were thus stigmatized and treated with disdain and opted to withdraw their services for fear of their lives while others insisted on higher allowances to mitigate risks posed to their work.

Mandatory testing became a new complexity that took more time and later had an

impact on the turnaround time, both in the handling facilities and general time taken along the corridors. The turnaround time for the testing results was not guaranteed, making it difficult to project delivery times and planning for service providers along the corridors.

Similarly, demand for testing based on the available kits created congestion both for shipments at the ports and at the borders, resulting in long queues as witnessed in some border points such as Malaba and Busia.

The introduction of a testing fee of USD 65 by the government of Uganda to meet the cost of the test resulted in some truck drivers opting to be tested in Kenya which initially provided the same services for free. The testing fee has since been reduced to USD 50. The absence of harmonized regional testing procedures and recognition of the test



results in the second quarter of 2020, led to retesting which increased delays and incurred additional costs for a truck. The introduction of the Regional Electronic Cargo and Driver Tracking System (RECDTS) has since alleviated the challenge of not recognizing COVID-19 certificates by the EAC Partner States.

3.4.4 Online submission of documents

Provision for online submission of documents existed amongst trade facilitation agencies, such as the revenue authorities in Rwanda, Uganda, and Kenya. Enhanced utilization of ICT facilities was made possible by making it mandatory for clearing agents to submit customs-related documents online as opposed to physical submission. Although this was welcome by the industry, lack of resources, both human capacity (skills) and equipment by some clearing agents, and delays in approval of documents

on the part of some customs officials posed a major challenge.

Another notable challenge was the system down times occasioned by the increased number of users and documents uploaded, which resulted in low-efficiency levels, consequently, processing and approval delays. Lack of well-defined timelines for action on either side of the system compromised the user expectations for best outcomes. Some Partner States had online supervisory tools that ensured action timelines, failure to which, the task was escalated to the next supervisor.

The online submission of documents exposed a need for an integrated portal for all other government agencies since some are not digitalized and/or integrated. This made it difficult to attend to some tasks, consequently, needing physical intervention.

3.4.5 Working from home

Considering that older people or those with underlying conditions were more vulnerable to COVID-19, most Partner States directed that the two categories be exempted from physically discharging their duty. This meant that some would work from home and/or take total leave from work. This reduced the mandatory workforce at the handling facilities for tasks that cannot be done from home. For instance, the operation of some handling equipment such as top loaders, terminal tractors, and crane handling among many more. The result was that specific expected tasks remained unattended, creating a void that reduced the efficiency and/or slowed delivery of such service and approvals. This impacted on time of delivery and cost due to prolonged cargo dwell time at the handling facilities.

3.4.6 Introduction of port health as a lead agency

Before the COVID-19, port health services were more pronounced at airports. Their role became more critical at the importing ports and cross borders after clearance by port health became mandatory before the commencement of any process of cargo clearance by other government agencies. This created a challenge in changing the traditional process where truck drivers crossed straight into the territories of the importing countries for shipment verifications by joint customs administrations and customs agents and/or release for onward trucking.

The absence of harmonized testing procedures and mechanisms for validating the certificates amongst the Partner States led to delays and frustrations amongst the truck drivers and the condemnation of port health workers. Furthermore, frustration arising from the

long wait for tests resulted in truck drivers having to bribe, to influence both the test turnaround time and securing favourable results. Port health service providers have since then been accepted and become an integral part of customs and border crossing procedures; however, their key challenge is that they work independently of each other and sometimes have limited testing reagents.

3.4.7 The Rwandan case

The Government of Rwanda whilst appreciating the importance of transport and logistics and the imminent danger of COVID-19 to the community, decided to move activities in the transport and logistics sector to the border. This was to contain the then notion of drivers being the highest risk carriers of the virus across the region by allowing for offloading at the border points. Clearing agents were moved to a specific area where they were to render

services without going back to their families for control services. In effect, the new complexities compromised the delivery agreements and contracts that were already in place and exposed parties to the risk of loss.

As truck drivers were not allowed into the country (Rwanda), they had little trust in the third-party operators. Traders were also forced to accept available service providers who were not their preferred choices. There was also the danger of mishandling the shipment since some require expert handling in the warehouses and beyond. Additionally, shipments had to adjust the anticipated delivery timelines since cargo was offloaded at the border points and cleared before re-distribution to intended importers. The double handling of shipments added to their initial cost of the shipments since the anticipated handling and transport envisaged a one-off charge.



3.4.8 Alternative forced transport

To limit driver interaction along the Northern Corridor from Mombasa, it was directed that all transit shipments be railed ex hook to the dry port in Naivasha for further clearance and loading on trucks, and thereafter, onward transport to the desired destination in the importing countries. The business community from the importing countries resisted this directive, citing added costs. On the other hand, customs agents had the challenge of establishing mini offices and acquiring requisite staff for these off-site offices.

In the end, the logistics of sending empty containers to appointed shipping line depots diluted the intention since all empty containers had to be returned to Mombasa by road.

3.4.9 Switching drivers to move cargo.

Due to delayed COVID-19 test results and in cases where the truck driver tested positive while trucks were on transit, and expiry of the validity of certificates, some transporters willingly made local arrangements to switch drivers - mostly at Busia and Malaba border. This was experienced especially before the Regional Electronic Cargo and Driver trucking System (RECDTS). Rwanda, for instance, and especially at the Rusumo border, adopted relay driving, where their local drivers took over from the drivers coming with trucks from the port of loading as a measure to deter the spread of COVID-19. This paused a major concern and challenge to cargo owners since the truck and cargo were handed over to unknown persons with no guarantee of safety.

During the first quarter of 2021, some of the key

challenges that were faced at the onset of the COVID-19 pandemic have been addressed. For instance, the establishment of testing centres, better coordination of testing and release of results, adoption, and a better understanding of health protocols. Some key border points such as Busia have increased the number of port health officers from the initial four (4) in the second quarter of 2020 to the current seven (7). There is also less stigmatization of truck drivers thanks to the sensitizations that have ensured mutual understanding on COVID-19. Of concern, however, is the perennial shortage of test kits which has led to the temporary closure of some of the test centres.

3.5 Impact of COVID-19 on Transport and Logistics, Time, and Cost Implications

The East African Community is currently served by two ports majorly - Mombasa

and Dar es Salaam. The disruptions caused to the transport and logistics sector in the EAC affected trade facilitation and overall trade performance in the region.

3.5.1 Performance

3.5.1.1 Port Throughput

Mombasa Port

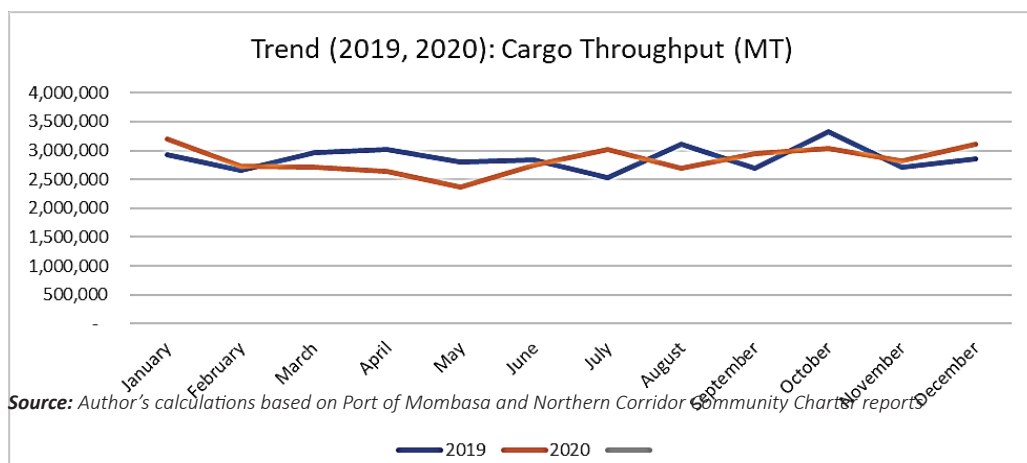
Port throughput, which is defined as the total volume of cargo discharged and loaded at the port, includes

break-bulk, liquid bulk, dry bulk, containerized cargo, transit cargo, and transshipment.

In 2020, the Port of Mombasa in Kenya, which serves the Northern Corridor recorded a reduction in throughput from a projection of 35.9 million tons in total throughput and 1.49 million Twenty-foot Equivalent Unit (TEUs) in container traffic to 34million tons and 1.358 million TEUs (figure 1).

Furthermore, the Port of Mombasa registered a 4% reduction in container traffic in 2020 (figure 2) (KPA, 2020). The effects were most felt in March to June 2020, due to disruption in the logistic supply chain caused by lock downs, withdraw of labour, restrictions of vessel movements, new and revised cargo clearing process, and other measures adopted to protect against the pandemic.

Figure 10: Port of Mombasa cargo throughput performance - 2019/2020



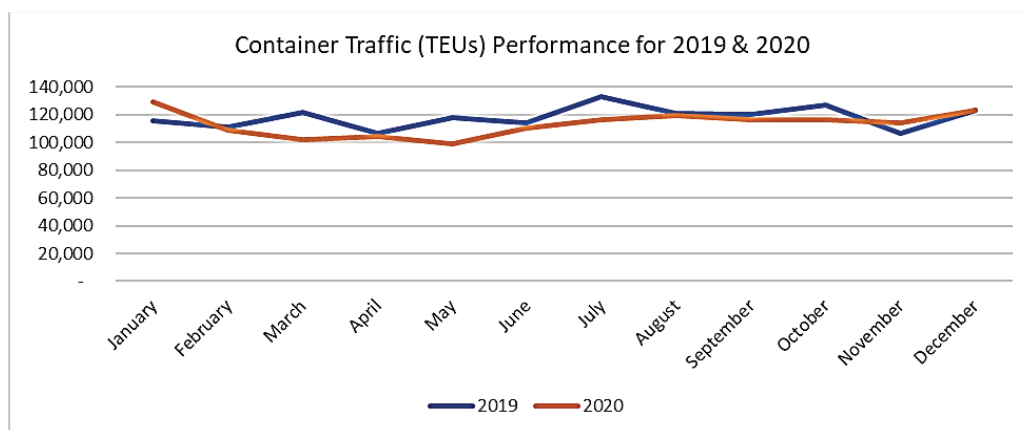
China was seen as the epicentre of the COVID-19. Being among the top trading partners, contributing 29.2% of the full import containers or 9.9% of the total cargo throughput handled at the Port (2019 Port Statistics), the impact of the pandemic on China was immediately felt in the Port's traffic and revenue. The big container liners from China such as Evergreen and COSCO line

and several bulk carriers cancelled their normal calls in the first quarter.

Container Traffic (TEUs) Trend: 2019, 2020

Container traffic is defined as the total volume of container cargo discharged (imports) and loaded (exports) at the port. It includes transshipment at the port.

Figure 11: Container traffic (TEUs) performance for the year 2019 and 2020



Source: Author's calculations based on Port of Mombasa and Northern Corridor Community Charter reports

The number of containers cleared within the 4-day free period declined drastically at the Inland Container Depot (ICDN) in Nairobi. Subsequently, about 60% of cargo cleared through the ICDN incurred storage charges amounting to an average of KES 9m to 11Million in storage charges weekly (SCEA, 2020). The

depressing performance of container traffic due to the COVID-19 pandemic was heavily registered as containers handled in 2020 were below traffic handled in 2019 throughout the period between February to October. The total number of TEUs passing through the Port of Mombasa in 2020 reduced by 4% compared

to the previous year. The decline was most felt in March to June 2020, due to disruption in the logistic supply chain caused by lock downs, withdrawal of labour, restrictions of vessels movements, new and revised cargo clearing process, and other measures adopted to protect against the Coronavirus pandemic.

Market share (imports by country)

Comparing 2020 with 2019, domestic traffic reduced from 70% to 66% while transit cargo grew significantly from 31% to 34%. Uganda bound cargo declined from 82% recorded in 2019 to 76% while cargo destined to Tanzania declined from 3% to 2.5%. Registering an increase is cargo destined to South Sudan from 8% in 2019 to 10.4% in 2020, DR Congo from 5% to 7.2% as well as cargo to Rwanda from 2% to 4.2%.

Table 7: Port of Mombasa import by country

Economy	2016	2017	2018	2019	2020	Proportion
Total Traffic	26,776	29,398	29,601	31,836	34,115	
Kenya	19,027	20,761	19,996	21,888	21833.6	
% of total traffic	71%	71%	68%	70%	66%	70%
Others	7749	8637	9605	9948	12281.4	
	29%	29%	32%	31%	34%	30%
Of which:						
Uganda	82%	82%	82%	82%	75.7%	82%
South Sudan	8%	8%	8%	8%	10.4%	8%
DR Congo	5%	4%	5%	5%	7.2%	5%
Tanzania	2%	3%	26%	3%	2.5%	8%
Rwanda	3%	2%	2%	2%	4.2%	2%
Burundi	0.50%	0.30%	0.20%	0.02%	0.01%	0.20%
Others (Including Somalia)	0.20%	0.20%	0.10%	0.10%	0.04%	0.10%

Source: Port of Mombasa & Northern Corridor Community Charter

Dar es Salaam Port

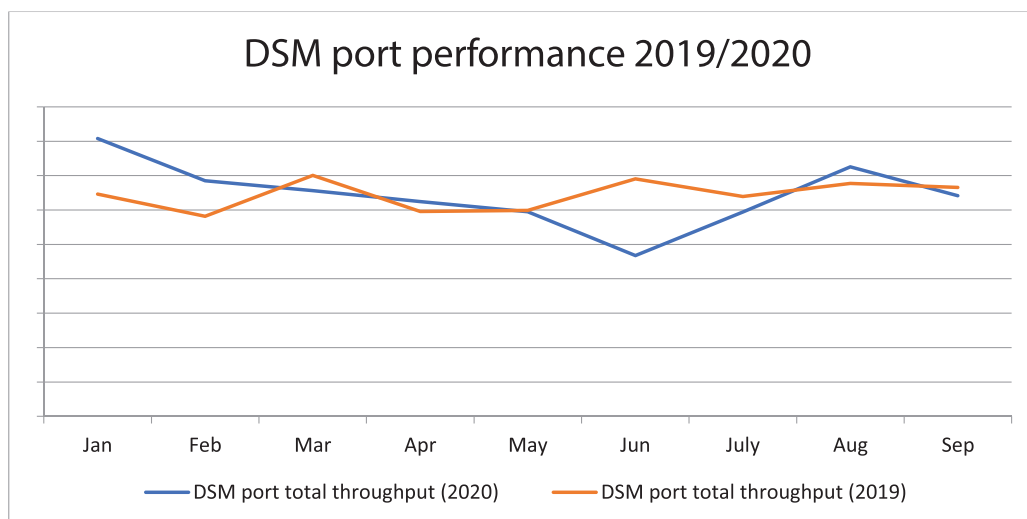
Port throughput

The situation at the Port of Dar es Salaam in Tanzania was slightly different. The port throughput was 11,596,225 tons in 2020

for the period between January to September, higher by 4939 tons margin compared to 2019 for the period under review. The throughput depressed from

March to July but by smaller margins almost performing to the levels achieved in 2019, contributing to a slight improvement in throughput during the year.

Figure 12: DSM Port total throughput 2019/2020



Source: Central Corridor, Dar es Salaam port, 2020

The trend remained similar for the cost of transport in the Central Corridor, which is served by the Port of Dar es salaam. There was a slight reduction in rates- the average cost from Dar es Salaam Port to Kigali reduced to \$2800 in 2020 from \$2867 in 2019, Dar es salaam to Bujumbura reduced from \$3,067 to \$2,978 while the cost from Dar es salaam to Bukavu went down from \$4,900 to \$4,856 (table below).

Table 8: Central Corridor transport costs and rates pre-COVID and during COVID - 2019/2020

Route	Dar-Kigali		Dar-Bujumbura		Dar- Kampala		Dar-Bukavu		Dar-Goma	
	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020
JAN	\$3,000	\$2,900	\$3,200	\$3,100	\$3,200	\$3,200	\$4,900	\$4,900	\$4,300	\$4,300
FEB	\$2,900	\$2,900	\$3,200	\$3,100	\$3,200	\$3,200	\$4,900	\$4,900	\$4,300	\$4,300
MAR	\$2,900	\$2,900	\$3,000	\$2,800	\$3,200	\$3,200	\$4,800	\$4,800	\$4,200	\$4,300
APR	\$2,800	\$2,800	\$3,000	\$2,900	\$3,300	\$3,500	\$4,800	\$4,600	\$4,100	\$4,100
MAY	\$2,800	\$2,800	\$3,000	\$2,800	\$3,200	\$3,500	\$4,800	\$4,600	\$4,100	\$4,000
JUN	\$2,800	\$2,800	\$3,000	\$3,100	\$3,300	\$3,400	\$4,900	\$4,900	\$4,150	\$4,400
JUL	\$2,800	\$2,700	\$3,000	\$3,000	\$3,300	\$3,400	\$5,100	\$4,900	\$4,150	\$4,300
AUG	\$2,900	\$2,700	\$3,000	\$3,000	\$3,300	\$3,300	\$5,000	\$5,000	\$4,200	\$4,400
SEP	\$2,900	\$2,700	\$3,200	\$3,000	\$3,300	\$3,300	\$4,900	\$5,100	\$4,200	\$4,400
AVG	\$2,867	\$2,800	\$3,067	\$2,978	\$3,256	\$3,333	\$4,900	\$4,856	\$4,189	\$4,278

Source: Central Corridor, Dar es Salaam Port, 2020

Imports by country

Of the total imports, 63% was local cargo for the period between January to September 2020, which is a reduction of 4% from the 67% recorded in 2019 during the same period. Transit cargo accounted for 37% in 2020, an increased

from 33% in 2019, of which 25% was destined for DRC Congo, 8.57% for Burundi, 25.31% for Rwanda, 2.97% for Uganda, and 37.18% for the rest of the countries. Comparing 2020 to 2019, during the same period, there was a decline in cargo

destined to D.R.C Congo by 0.6%, Rwanda by 0.1%, and a decline of 9.6% for cargo destined to the rest of the countries. Cargo destined to Burundi improved by 1.6% followed by cargo to Uganda with a 0.4% increase.

Table 9: Dar es Salaam port import by country

COUNTRY (Import by country)	DISCHARGED/IMPORTS					
	Jan – Sep 2020	% of total imports (local & transit)	Jan – Sep 2019	% of total imports (local & transit)	Variance	% change
Local	6,257,497	67%	5,951,179	63%	306,318	3.3%
D.R.C Congo	873,532		894,106		-20,574	-0.6%
Burundi	350,873		295,005		55,868	1.6%
Rwanda	863,533		870,927		-7,394	-0.1%
Uganda	116,422		102,192		14,230	0.4%
Other	947,860		1,278,501		-330,641	-9.6%
Total transit	3,152,220	33%	3,440,731	37%	-288,511	-3.1%
Total discharged	9,409,717		9,391,910		17,807	0.2%

Source: Central Corridor, Dar es Salaam Port, 2020

3.5.1.2 Costs and Rates

Northern Corridor Transport (Port of Mombasa)

Disruptions caused by the COVID-19 in transport and logistics operations

also resulted in higher operational costs, delays, and in some cases, cancellations of orders. For example, truck turnaround from Mombasa to Kampala reduced from 4 trips to 2 trips per month

(KTA, 2020). Though transporters adjusted their rates upwards, it was truck owners who absorbed about 48% of the costs which were attributed to border crossing delays as they had to service

existing transport contracts. There was a general increase in truck turnaround time for Mombasa-Kampala from 2-4 days to an average of 7-9

days. During the second and third quarter of 2020, this resulted in an increase in transport rates from \$2100 to \$2500 and a varied extra

driver and or delay cost of \$100-\$200 per day (table below).

Table 10: Northern Corridor transport cost and rates during COVID-19

Transport Route	Pre-COVID Rates (USD)	Rates (March - June 2021)	Pre-COVID Average Transit Time (In Days)	Average Transit Time (March – June)	Extra Costs @ USD 200 Per Day
Mombasa - Kampala	2100	2500	2-4	7-9	\$1000
Mombasa - Kigali	3400	3800	7-8	14-16	\$1400
Mombasa - South Sudan	3600	4500	9-10	21- 26	\$2800
Mombasa -Bujumbura			9 – 10	19-20	\$2000
Mombasa - DRC	5000	6000	20-21	30-45	\$3400
Nairobi - Zambia	6000	7000	10-12	30-32	\$4000

Source: KTA (2021)

Central Corridor Transport cost & rates 2019/2020 (Dar-es-salaam Port)

The cost of transport in Tanzania remained nearly the same, comparing 2020 to 2019, which shows slight differences of both increase and decrease depending on the destination of the cargo. The trend remained similar for the cost of transport in the Central Corridor, which

is served by the Port of Dar es salaam. There was a slight reduction in rates - the average cost from Dar es Salaam port to Kigali reduced to \$2800 in 2020 from \$2867 in 2019, Dar es salaam to Bujumbura reduced from \$ 3,067 to \$ 2,978 while the cost from

Dar es salaam to Bukavu went down from \$4,900 to \$4,856 (table below). Recording an increase was the transport cost from Dar to Kampala from \$3,256 to \$3,333 and the transport cost from Dar to Goma from \$4,189 to \$4,278.

Table 11: Central Corridor transport costs and rates pre-COVID and during COVID - 2019/2020

Route	Dar-Kigali		Dar-Bujumbura		Dar- Kampala		Dar-Bukavu		Dar-Goma	
	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020
JAN	\$3,000	\$2,900	\$3,200	\$3,100	\$3,200	\$3,200	\$4,900	\$4,900	\$4,300	\$4,300
FEB	\$2,900	\$2,900	\$3,200	\$3,100	\$3,200	\$3,200	\$4,900	\$4,900	\$4,300	\$4,300
MAR	\$2,900	\$2,900	\$3,000	\$2,800	\$3,200	\$3,200	\$4,800	\$4,800	\$4,200	\$4,300
APR	\$2,800	\$2,800	\$3,000	\$2,900	\$3,300	\$3,500	\$4,800	\$4,600	\$4,100	\$4,100
MAY	\$2,800	\$2,800	\$3,000	\$2,800	\$3,200	\$3,500	\$4,800	\$4,600	\$4,100	\$4,000
JUN	\$2,800	\$2,800	\$3,000	\$3,100	\$3,300	\$3,400	\$4,900	\$4,900	\$4,150	\$4,400
JUL	\$2,800	\$2,700	\$3,000	\$3,000	\$3,300	\$3,400	\$5,100	\$4,900	\$4,150	\$4,300
AUG	\$2,900	\$2,700	\$3,000	\$3,000	\$3,300	\$3,300	\$5,000	\$5,000	\$4,200	\$4,400
SEP	\$2,900	\$2,700	\$3,200	\$3,000	\$3,300	\$3,300	\$4,900	\$5,100	\$4,200	\$4,400
AVG	\$2,867	\$2,800	\$3,067	\$2,978	\$3,256	\$3,333	\$4,900	\$4,856	\$4,189	\$4,278

Source: Central Corridor, Dar es Salaam Port, 2020

3.5.1.3 Time (Cargo Dwell Time & Port Truck Turnaround Time)

Cargo dwell Time at the port of Mombasa

Dwell time is measured as the time elapsed between cargo being unloaded from a ship until it leaves the port gates. The pandemic worsened the dwell time especially

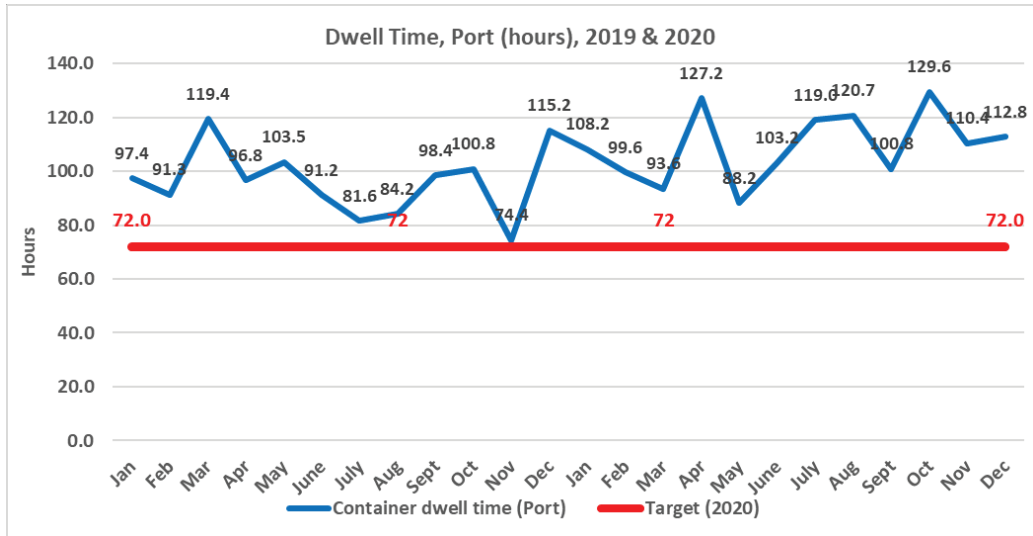
during the first quarter of 2020 where the dwell time reached an average of 6 days in April from the initial 3 days in March. This was due to the reduced

human resource because of staff working from home among adherence to other containment measures.





Figure 13: Port of Mombasa cargo dwell time during the pandemic



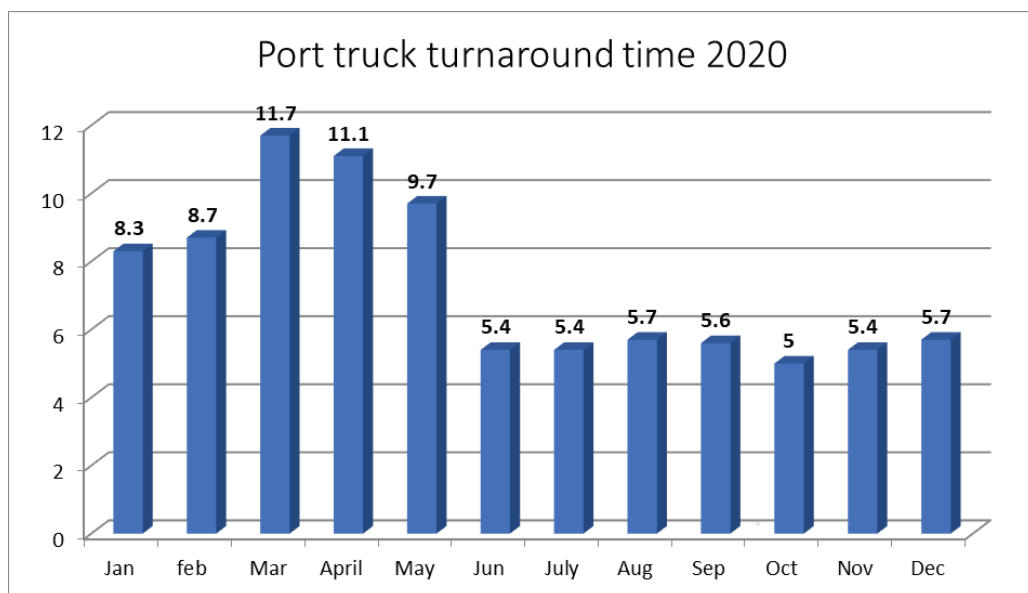
Source: Port of Mombasa & Northern Corridor Community Charter

Port Truck Turnaround time at the Port of Mombasa

At the onset of the pandemic, during March and April, the truck turnaround time was at its highest. This may be attributed to the stringent containment measures such as night curfew, working from home, and social distancing.

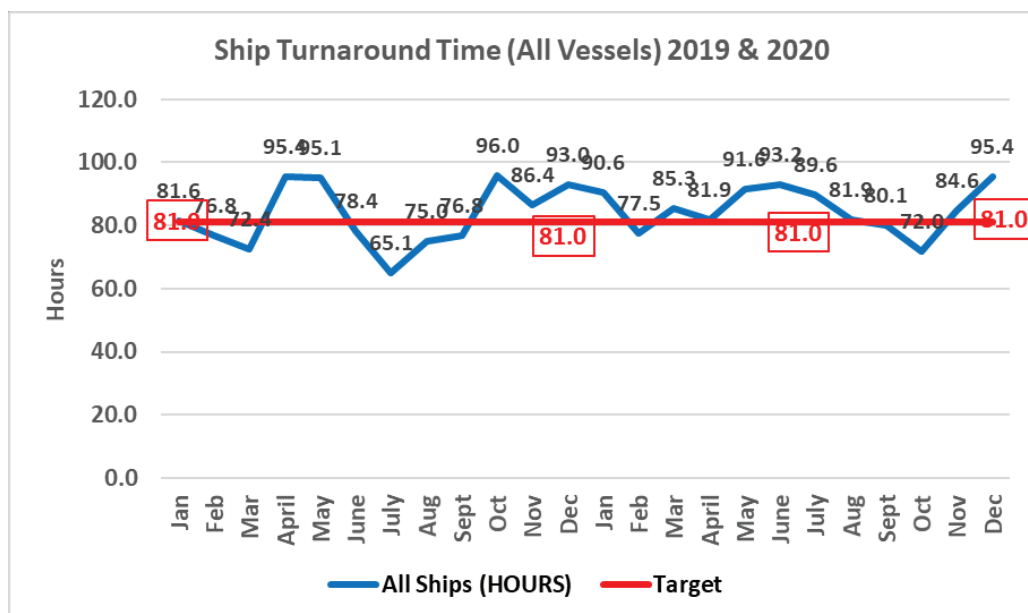


Figure 14: Port of Mombasa truck turnaround time, 2020



Source: Port of Mombasa & Northern Corridor Community Charter

Figure 15: Ship turnaround time comparison pre-COVID and during COVID



Source: Port of Mombasa & Northern Corridor Community Charter

Performance in 2020 was worsened by the stringent measures introduced to mitigate the spread of the Coronavirus to dock workers and the increased documentation process as vessels waited to be cleared. The government directives on curfew and advice to “stay and work at home” also disrupted the working system as workers had to observe dusk to dawn curfews, including support

workers who played a critical role in the clearing of vessels, for instance, finance and billing.

3.5.1.4 Inland Container Depots

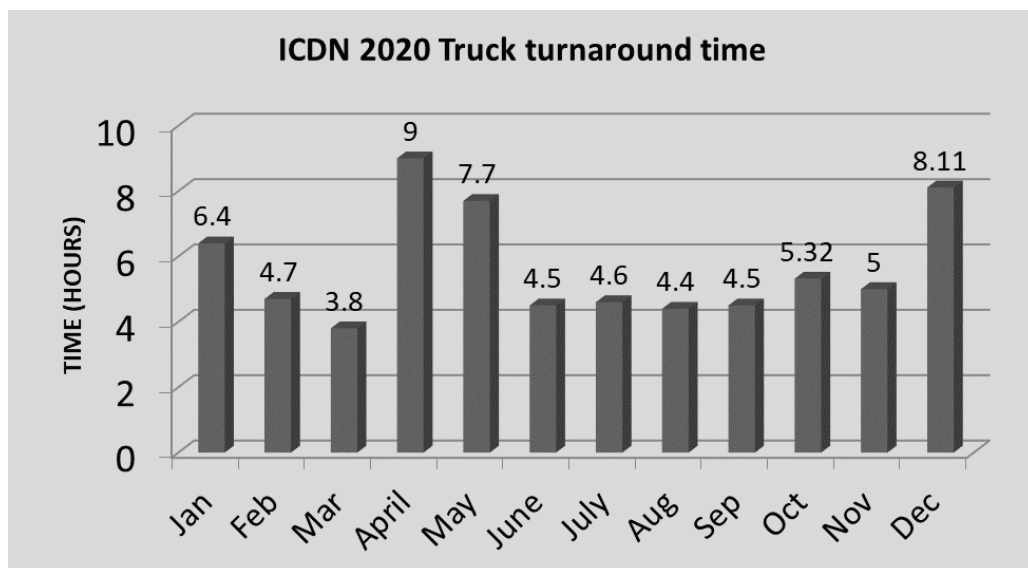
The Nairobi Inland Container Depot is linked by Rail to the Port of Mombasa and provides shippers with dry port facilities in Nairobi. The ICDN can accommodate a throughput of over 180,000

TEUs per annum, making it ideal for shippers of both exports and imports and empty containers.

Truck turnaround time

The truck turnaround time for ICDN went up during April and May, registering an average of 9 hours and 7.7 hours attributed to stringent containment measures such as curfew, working from home, and social distancing.

Figure 16: ICDN 2020 truck turnaround time



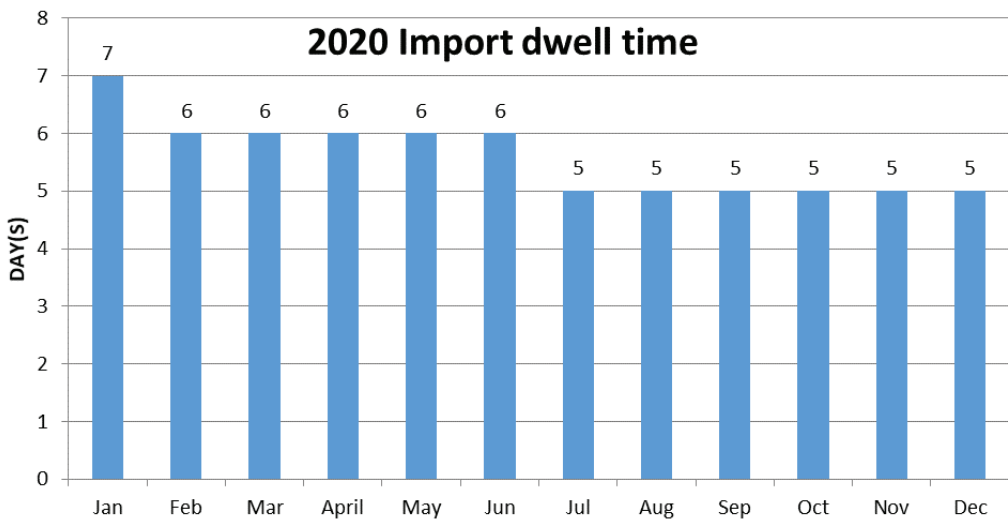
Source: ICDN weekly reports

Dwell time is measured as the time that elapses from the time cargo enters a terminal facility to the time it is released. The graph above indicates a steady improvement in the cargo dwells time at

ICDN during the COVID-19 period. This is attributed to lead government agencies reducing physical verification by about 50% and encouraging online submission of documents by email. That meant that most

cargo was processed online without much physical inspection, resulting in a decrease in the number of containers verified hence more cargo cleared.

Figure 17: ICDN Import Dwell time performance during COVID-19.

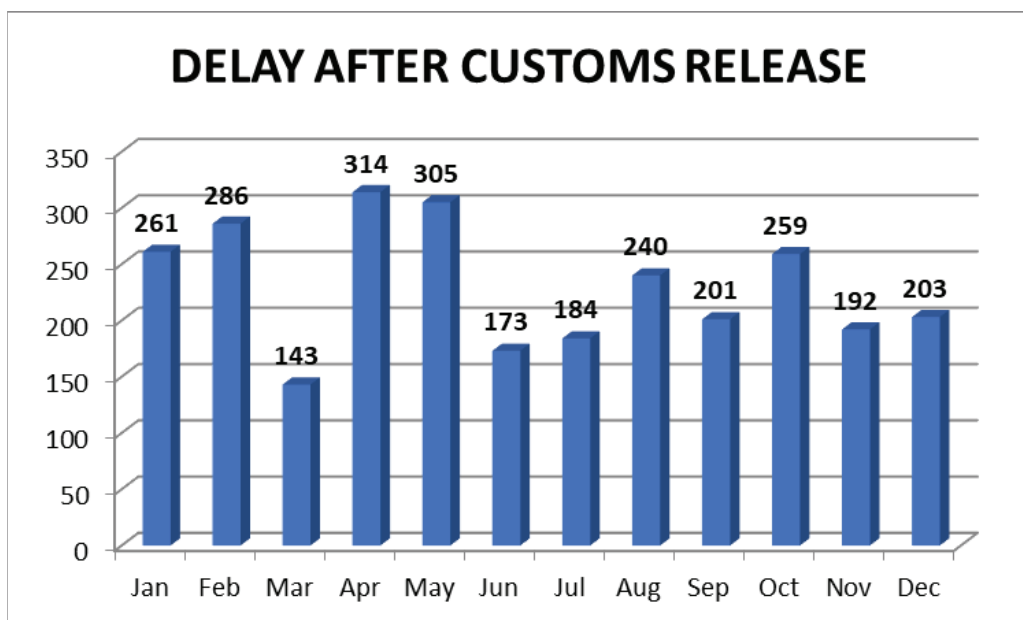


Source: ICDN weekly reports

Containers paying penalties after customs release.

At the pick of the pandemic in April and May, there was an increase in the number of containers penalized for delays after customs release, due to the employed containment measures.

Figure 18: Delay after customs release at ICDN

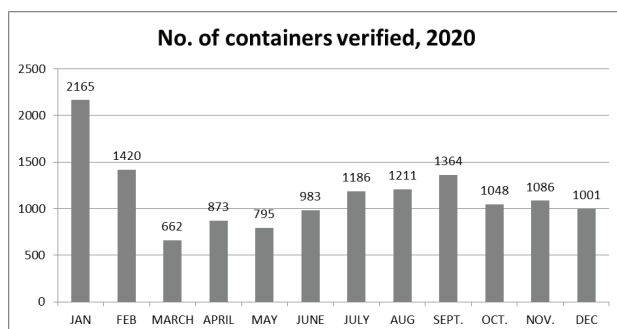


Source: ICDN weekly reports

Verification

There was a notable reduction of about 50% in the number of containers physically verified during the pandemic at ICDN. Non-intrusive verification was adopted, complemented with online submission of documents, leading to expedited processing and release.

Figure 19: Verification performance, 2020



Source: ICDN weekly reports

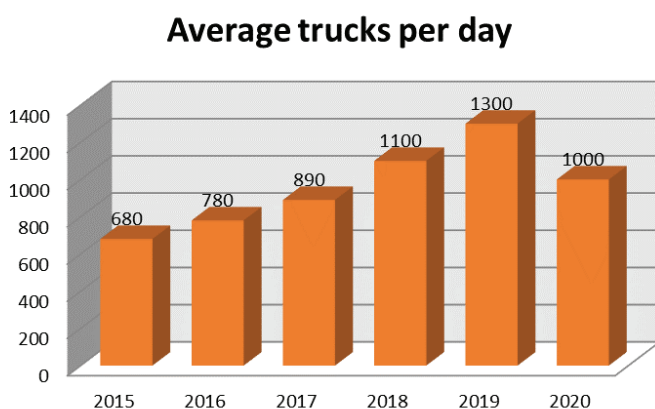
3.5.1.5 Border Malaba border traffic

The border registered a tremendous increase in traffic outbound flow before the COVID-19 period, with an average of 680 trucks handled daily in 2015, 780

trucks daily average in 2016, 890 trucks in 2017, 1100 trucks in 2018, and 1300 trucks in 2019. The year 2020 recorded a decrease in the number of trucks

passing through the border with an average of 1000 trucks per day and in some months during the year, recording as low as 500-600 trucks per day.

Figure 20: Average number of trucks handled at Malaba border per day.



Source: Northern Corridor observatory reports





CHAPTER FOUR: DISCUSSION, CONCLUSIONS AND RECOMMENDATIONS

4.1 Discussion

The COVID-19 pandemic has had serious implications on the transport and logistics sector and the East African economy broadly. The study findings indicate that while government interventions were important, the lack of a consultative and harmonized regional approach in the interventions made their impact minimal. Like the ECOWAS, it is prudent that the EAC institutes a Committee of Experts to advise and inform the EAC regional government on the present and future crises.

The impact of the pandemic on the region can be mitigated with adequate funding, capacity, and implementation of the agreed EAC Administrative Guidance. The institution of the stimulus package by the Government of Kenya, for instance, was well received.

However, there is a need to have the EAC Partner States avail targeted stimulus in this sector given its importance to the economy. The study found that there is a need to establish a pandemic funding mechanism to ease the adverse impacts of COVID-19. Similarly, the region should develop a Standard Operating Procedure for the implementation of the agreed interventions such as Administrative Guidelines to ensure their success.

The resilience of the private sector ensured that the transport and logistics sector withstood the adverse effects of COVID-19, especially amongst SMEs. Little or minimum layoffs have been reported although some large transports and logistics companies withdrew their transit

services at the height of the massive snarl-ups at the border. The implementation of the online submission of documents and deployment of non-intrusive verification is a clear testament to the ability of the private sector and government agencies to adapt to external shocks. The two initiatives should be sustained as they have had a profound impact on the reduction of cargo clearance time.

Capacity building of associations to help respective members appreciate the need for aligning and implementing emerging issues during a pandemic is also paramount. Fully professionalizing the sector through enactment of the proposed national self-regulation laws is the ultimate step in positioning the sector to deal with such



pandemics. Addressing the stigmatization amongst truck drivers reduced the hostility by the public towards them. Drivers are now more willing to undertake COVID-19 tests and accept the results. Going forward, as essential operators and service providers, Member States should prioritize truck drivers and other logistics sector players in the ongoing vaccination campaigns.

Women in business especially at the borders

were adversely affected by the pandemic due to a lack of specific recognition of their services and their existence. This made them targets of sexual abuse, harassment, and extortions to the extent many decided to close their business operations temporarily. Specific policies need to be developed and implemented to protect and support the return of this vulnerable group to business – during and after the pandemic.

There is a need to review the East Africa Community Customs Management Act (EACCMA) to take cognizance of the current and ongoing automation initiatives within the space of transport and logistics in the region. There is also a need to explore the establishment of extra border crossing points to curb illegal crossing points as witnessed during the pandemic between Uganda and Kenya.


4.2 Gaps in the Interventions of EAC Partner States

- **Lack of Harmonised Procedures:** There was a lack of harmonized Standard Operating Procedures (SOPs) at border points to facilitate easy border crossing, resulting in delays. Some infections among truck drivers were attributed to congestion at the border points and the Port of Mombasa.
- **Lack of implementation and enforcement mechanism of regional policies, guidelines, and directives by the EAC.** The EAC issued guidelines that were intended to trigger a harmonized approach to the pandemic. There was

however no mechanism to enforce these guidelines when the other Partner States decided not to follow them.

- **Weak inter-agency and joint border coordination, cooperation, and management at some borders.** For instance, nationally, between the entire border management agencies represented at the border, and internationally, between the border management agencies on each side of the border. This also includes lack of a platform to articulate their needs for better coordination of the border.

- **Limited levels of professionalism in the logistics sector to make a shift to automated operations seamless.** The sector could simply not be trusted to operate without oversight by the government agencies.
- **Gaps in the enforcement of the health protocols and guidelines:** Existing gaps were on the overall behaviour of the law enforcers who employed inhuman punitive measures to ensure compliance with health protocols. Some of the measures affected transport and logistics operators. There is a need for sensitization amongst the law enforcers and all citizens.
- **Health sector resource constraints:** For example, lack of capacity for testing all truck drivers in time by respective health facilities in Member States. For instance, Miritini in Kenya could only test 100 truck drivers a day against a daily demand of 400 (KTA, 2020).
- **Skewed recognition of logistics sector essential workers.** For example, customs officers were recognized as essential workers, yet customs agents were not expressly mentioned. There was a lack of implementation of guidelines to facilitate the movement of essential services providers and access to the lockdown areas. The ongoing vaccination has still not recognized transport and logistics workers as frontline workers in most Partner States.
- **Poor coordination among the lower and national governments in the provision of basic amenities in running COVID-19 related facilities:** In some Partner States, water supply for hand washing and hand sanitizers in the designated public places was often a challenge. Both the public and private sectors were not able to provide adequate safety gear to their employees.
- **Technology limitations:** For instance, lack of procedures and IT infrastructure to support working from home: This resulted in delayed approvals, and lack of adequate infrastructure to support online service provisions in ensuring the continued flow of cargo across borders. Some borders and container depots lacked basic facilities such as scanners.
- **Poor risk management, planning, and implementation strategies.** Regional operators – private and public – were caught unawares by the pandemic. The gaps in the design and implementation of interventions indicate a lack of risk management strategies for crisis response.
- **Inadequate infrastructure along corridors and at key border crossings to manage congestion:** Most borders lacked sufficient space to deal with the new requirements of driver testing as well as enabling crew that are already tested or authorised economic operators to cross borders without delay. There were also



no procedures or policies to override trucks' nominated border of exit in the event of congestion at the designated border point. This meant that trucks still had to proceed to the nominated border despite advance knowledge of the undesirable conditions at the border in question.

- Limited involvement of the private sector in the development of the protocols and guidelines.

4.3 Operational & Policy

Recommendations for Effective Responses to COVID-19 and Future Pandemics

Several recommendations are derived from the findings of this study. The recommendations address both operational responses as well as policy responses. If implemented, they will help reduce the negative impact of COVID-19 and any future pandemic that might affect the sector. The recommendations are:

- **Develop IT Infrastructure to enhance automation:** The establishment of online systems and platforms to ensure the exchange of information will help reduce inconsistencies and communication barriers inherent in the sector. Additionally, foster upgrading systems from receiving online submissions to complete digitization.

- **Prioritise vaccination of transport and logistics sector players against Covid19:**

All EAC Partner States should consider prioritising vaccinating especially cross-border truck drivers and quickly develop a regional framework for recognising their vaccination certificates.

- **Develop regional border infrastructure:**

Infrastructure development through expansion of roads at the OSBPs, especially Malaba and Busia to ease congestion and to separate drivers requiring COVID-19 test from the rest for ease of clearance for border crossing. Road Side Stations would have eased the pressure caused by Covid19.

- **Integrate border management:**

Nationally, between the entire border management agencies represented at the borders, and internationally, between the border management agencies on each side of the borders. This includes the development of a shared platform to articulate their needs for better coordination of the border.

- **Support national and regional efforts to ensure a fully professional logistics industry:**

This includes initiating capacity-building efforts and setting regional standards, structures, and mechanisms for adoption by industry players.

- **Develop a joint regional approach to COVID-19:**

This is through harmonization of testing and vaccination processes and procedures, as well as joint financing of

testing and COVID-19 test and vaccination certificate recognition and validation, among the Partner States.

- **Enhance partnership and cooperation between health agencies and port health service providers at the OSBPs to work together.** This could be augmented by instituting a stronger health department at the sector secretariat to effectively coordinate health operations within the community.
- **Develop Harmonised Interventions:** Regional interventions such as free period extension for imports and containers need to be provided by the various government agencies at the ports.
- **Develop a Regional Stimulus-Response Plan:** The sector needs stimulus funds, subsidies, or capital endowments to ensure the repatriation of nationals, the supply of emergency and medical products and in preparation to deal with any unpredicted crises.
- **Promote Public-Private Partnerships:** Alliances with the private sector have proven beneficial in many contexts, including helping governments reach necessary investment levels and allowing companies to gain more market share. It will be important to nurture such alliances and to build and keep new links with the private sector.

- **Increase of human resource:** The sector was faced by large staff lay-offs especially in airlines and rail operations, affecting the productivity and efficiency in the discharge of duties. Increasing the number of officials at busy border points such as Busia and Malaba would go a long in improving the crossing experience by reducing clearance time and overall enhancing regional trade.
- **Establish a National/Regional Disaster/Pandemic Framework:** Need to establish a regional disaster or Pandemic framework including setting up a regional Fund to facilitate a region response whenever such pandemics emerge. Similarly, there is a need to develop inter-agency policies to take cognizance of emergencies and inter-government relations during a pandemic.
- **Integrate regional transport nodes:** The interconnection of railway and roads, which strongly depend on the efficiency of each other need to be expanded. The end-to-end rail line would facilitate the ease of rail freight from Mombasa to Kampala and reduce congestions at the borders. This should be followed by making rail freight rates competitive to ensure continued adoption of rail freight, especially after the court ruling on forced use of rail freight in Kenya.

4.4 Conclusion

The COVID-19 pandemic exposed the need for the EAC region to enhance regional cooperation and integration for a more concerted approach to managing disasters and crises that occur on a regional level, to reduce their economic and social impact. Uncertainty remains about when the COVID-19 pandemic will be fully contained. There is therefore a need for vigilance and continuous preparedness.

Member States should follow recommended policy proposals to institute organs within existing frameworks to manage the impact of COVID-19. The region should also explore the facilitation of a regional stimulus and encourage continuous training for trade facilitation stakeholders. Considering the importance of the EAC trading bloc, the region must create a framework to centrally manage trade,

transport, and logistics challenges as may occur from time to time.

On the positive side, the pandemic resulted in progressive innovations such as the adoption of a less intrusive physical verification process by revenue authorities and the online submission of document

These non-intrusive measures verification should be sustained, as they provide an important baseline for the development of key infrastructure for ICT and digitalization. These should be expedited through legal reforms, processes, and systems development.

The management of the pandemic including testing necessitates the establishment of requisite framework and policy, and national and regional funds. The fact that Uganda charged for the tests as a cost recovering mechanism, while Kenya did not, further calls for a coordinated and harmonized approach to addressing the contagion. Moreover, stigmatization of truck drivers remains one of the greatest challenges notwithstanding the important role that they undertake to keep the economies of the EAC moving. In the management of the pandemic, it is stressed that elements of stigmatization must be mitigated.



REFERENCES

1. Africa Centers for Disease Control and Prevention. (2020). COVID-19 Guidance for the Transportation Sector. African Union
2. African Development Bank, African Economic Outlook 2020, <https://www.afdb.org/en/news-and-events/press-releases/east-africa-holds-its-ground-africas-fastest-growing-region-despite-COVID-19-disruption-36809>
3. Baldwin and di Mauro (2020). Mitigating the COVID Economic Crisis: Act Fast and Do Whatever It Takes. Centre for Economic Policy Research (CEPR). London
4. East African Business Council (EABC). (2020). Impact of COVID-19 on EAC Transport & Logistics Sector. EABC
5. East Africa Community (EAC). (2020). Administrative Guidelines to Facilitate Movement of Goods and Service During the COVID-19 Pandemic. EAC
6. ECDPM Discussion paper No 272 African Regional responses to COVID-19 <https://ecdpm.org/wp-content/uploads/African-regional-responses-COVID-19-discussion-paper-272-ECDPM.pdf>
7. ECOWAS (2020). ECOWAS guidelines Harmonization and Facilitation of Cross Border Trade and Transport in the ECOWAS Region on the COVID-19 Pandemic and related Post-Recovery Actions <https://www.tralac.org/documents/resources/COVID-19/regional/4091-ecowas-guidelines-harmonisation-and-facilitation-of-cross-border-trade-and-transport-COVID-19-june-2020/file.html>
8. Federation of Freight Forwarders Associations in East Africa (FEAFFA). (2020). Cross Border Movement of Cargo Within EAC During COVID-19 Pandemic. FEAFFA
9. Federation of Freight Forwarders Associations in East Africa (FEAFFA). (2020). Regional COVID-19 SOPs for Freight Forwarders in East Africa. FEAFFA
10. International Finance Corporation (IFC). (2020). Impact of COVID-19 on the Logistics Sector. Paper authored by Twinn, I., Qureshi, N., Conde, M. L., Guinea, C. G., and Rojas, D. P. IFC
11. International Monetary Fund, October 2020. Regional Economic Outlook, Sub-Saharan Africa, A Difficult Road to Recovery.

12. Kenya Ports Authority, Performance data 2020
13. Ministry of Health Kenya (2020)- <https://www.health.go.ke/>
14. Ministry of Health Uganda (2020)- <https://www.health.go.ug/>
15. Ministry of Health Tanzania (2020) – <https://www.moh.go.tz/en/>
16. Ministry of Public Health Burundi (2020)- <http://www.minisante.bi/>
17. Ministry of Health Rwanda (2020) – <https://www.moh.gov.rw/>
18. SADC. (2020). Bulletin 6 SADC regional response to COVID 19
<https://www.sadc.int/documents-publications/show/7654>
19. TTTFP Responses to COVID-19 Pandemic impact on Trade and Transport Facilitation in Eastern and Southern Africa Region.
20. Tanzania Ports Authority, 2020. “Port of Dar-es-Salaam Throughput and Performance Data”
21. United Nations (2021). World Economic Situation and Prospects.
22. World Bank (2020). COVID-19 and the Maritime and Logistics Sector in Africa. Paper authored by Richard Martin Humphreys, Anca Dumitrescu, Ninan Oommen Biju and Yin Lam. World Bank
23. WHO (2021). COVID 19 (WHO- Africa Region)
<https://who.maps.arcgis.com/apps/dashboards/0c9b3a8b68d0437a8cf28581e9c063a9>
24. World Health Organization. (2020a). 2019 Novel Coronavirus (2019-nCoV): Strategic Preparedness and Response Plan. World Health Organization.
25. World Health Organization. (2020b). COVID-19 Strategy Update. World Health Organization.
26. World Health Organization. (2020c). COVID-19 transmission and protective measures.
<https://www.who.int/westernpacific/emergencies/COVID-19/information/transmission-protective-measures>
27. WHO (2020d). Guidelines on rights, roles and response to Corona Virus (COVID 19)
https://www.who.int/docs/default-source/coronaviruse/who-rights-roles-respon-hw-COVID-19.pdf?sfvrsn=bcabd401_0

ANNEXES

Annex 1: Interview Guides

SERVICE PROVIDERS E.G. TRANSPORTERS, PORTS OPERATORS.

1. What operational challenges were encountered at ports, borders, ICDs, CFSs?
2. What is the effect of the pandemic on your performance/deliverables?
3. How have you dealt with the challenges?
4. What do you think could have been done differently?
5. What recommendations do you have to deal with these challenges or if another pandemic were to occur?
6. The borders witnessed serious delays during the Pandemic; in your opinion, what caused the long queues at the borders?
7. From your experience which border was most affected and why? (target truck drivers)
8. How did the government and private sector address the challenges?
9. How has the pandemic impacted documentation processing?
10. What underlying gaps did the pandemic unearth in the transport and logistics sector?
11. How has the Government or Government agencies responded? Was the response sufficient?
12. What can you describe as the biggest lessons learned to the sector during this pandemic period?
13. What operational, policy and co-ordination practices do you think can be adopted to cushion the Logistics Sector in case of such unforeseen pandemics in future?

POLICY ADEQUACY AND GAPS

1. How would you describe the prevailing regulatory environment?
2. What recommendations would you suggest making the sector survive the pandemic, Prepare for the future?
3. The governments have announced several stimuli to cushion the economy and the citizens. How effective were these interventions to the transport sector?
4. What interventions would you urge the government to institute to secure and support the Transport Sector amidst the Pandemic?
5. What policies do you expect the government to put in place to help the transport and logistics sector to prepare, overcome and or considerably reduce negative effect of unforeseen such occurrence?



GOVERNMENT AGENCIES

1. How has the Government or Government agencies responded to the COVID-19 outbreak regarding transport and logistics sector? Has the Governments response been sufficient?
2. How has the private sector service providers responded to the challenge?
3. What Would you consider as the greatest challenge during the pandemic?
4. What operational, policy and co-ordination practices can be adopted to cushion the Logistics Sector in such unforeseen pandemics in future?
5. What measures is the government and other related institutions adopting to ensure that movement of cargo continues during and post COVID-19 is not disrupted?
6. What other recommendations would you prescribe to address the challenges?

SERVICE PROVIDERS E.G. TRANSPORTERS, PORTS OPERATORS.

14. What operational challenges were encountered at ports, borders, ICDs, CFSs?
15. What is the effect of the pandemic on your performance/deliverables?
16. How have you dealt with the challenges?
17. What do you think could have been done differently?
18. What recommendations do you have to deal with these challenges or if another pandemic were to occur?
19. The borders witnessed serious delays during the Pandemic; in your opinion, what caused the long queues at the borders?
20. From your experience which border was most affected and why? (target truck drivers)
21. How did the government and private sector address the challenges?
22. How has the pandemic impacted documentation processing?
23. What underlying gaps did the pandemic unearth in the transport and logistics sector?
24. How has the Government or Government agencies responded? Was the response sufficient?
25. What can you describe as the biggest lessons learned to the sector during this pandemic period?
26. What operational, policy and co-ordination practices do you think can be adopted to cushion the Logistics Sector in case of such unforeseen pandemics in future?



POLICY ADEQUACY AND GAPS

6. How would you describe the prevailing regulatory environment?
7. What recommendations would you suggest making the sector survive the pandemic, Prepare for the future?
8. The governments have announced several stimuli to cushion the economy and the citizens. How effective were these interventions to the transport sector?
9. What interventions would you urge the government to institute to secure and secure and support the Transport Sector amidst the Pandemic?
10. What policies do you expect the government to put in place to help the transport and logistics sector to prepare, overcome and or considerably reduce negative effect of unforeseen such occurrence?

GOVERNMENT AGENCIES

7. How has the Government or Government agencies responded to the COVID-19 outbreak regarding transport and logistics sector? Has the Governments response been sufficient?
8. How has the private sector service providers responded to the challenge?
9. What Would you consider as the greatest challenge during the pandemic?
10. What operational, policy and co-ordination practices can be adopted to cushion the Logistics Sector in such unforeseen pandemics in future?
11. What measures is the government and other related institutions adopting to ensure that movement of cargo continues during and post COVID-19 is not disrupted?
12. What other recommendations would you prescribe to address the challenges?

Annex 2: Questionnaires

CLEARING AGENT/FREIGHT FORWARDER SURVEY QUESTIONNAIRE STUDY ON IMPACT OF COVID-19 ON LOGISTICS AND TRANSPORT IN EAST AFRICA

Optional

Name:

Designation:

Company:

Telephone:

Has your business been negatively impacted by the COVID-19 pandemic?

YES

NO

1. If yes, how would you rate the overall impact?

Category	Rating	Tick one
Minimal/nonexistent	0-5%	
Low	5 – 10%	
Medium	10- 20%	
Severe	20 – 30%	
Extremely Severe	Over 30%	

2. In a scale of 1 – 5 where 5 has the severest impact and 1 least impact how would you rate the impact to the following:

Managing Shipment	
Freight Rates	
Securing Vessels	
Delayed Documentation at source market/Shipper	
Securing transport services	
Complying with Government Agencies	
Clearing from the Port/ICDN	

3. How would you rate the response from the following?

	Poor	Fair	Good	Very Good	No-comment
Government Agencies					
Private Sector Service Providers					

4. In a scale of 1 – 5, (where 5 means greatest and one least impact), how would you rate the governments stimuli that were made to cushion the economy and the Citizens. How effective were these interventions to the transport sector?

Area	Rating
Impact on economy	
Impact on transport	
Impact on managing the impact	
Impact on your operational costs	
Impact of Clearing and Forwarding	
Not Aware	

5. How effective have the existing policies been in addressing the pandemic?

	Poor	Fair	Good	Very Good	No-comment
National Governments					
Regional Policies e.g. EAC, COMESA					

6. Has your business made any changes to its operations to mitigate the impact of the COVID-19 pandemic?

YES

NO

7.If yes, what are those changes?

Category	Code	Category	Code
Hired more labor	1	Downscaled operations	4
Working in shifts	2	Other (specify)	5
Working from home	3	Investment in ICT/Automation	

8. What were the main operational challenges encountered at the port, borders, in transit and other cargo handling related points at height of the COVID-19 pandemic?

Challenge	Code
Delays – leading to increased turnaround time	1
More/new clearance procedures	2
System failures	3
COVID-19 tests	4
Quarantine costs	5
Transshipment costs	6
New Technology requirements	7
Others (specify)	8

9. With the gradual easing of the COVID19 containment measures, have the new operational challenges that were encountered by the transport and logistics sector in above reduced?

YES

NO



10. If yes, which one(s) of the eased COVID-19 restrictions have been most beneficial to the transport and logistics sector?

Challenge	Code
Reducing curfew time	1
Stopping Relay driving	2
Harmonizing COVID-19 testing for crew	3
Transshipment at borders	4
Border staff isolation	6
Others (specify)	7

11. By what percentage in your view did the cost of transport and related procedures increase because of the COVID-19 containment measures?

	0-15%	15-30%	30-45%	Over 45%	Do not Know
Time spent to clear cargo					
Documentation & Clearance complexities					
Labor					

12. Has your business received any support from government or finance institutions to help mitigate against the effects of the COVID-19 pandemic?

YES

NO

13. If yes, please explain the nature of support.



14. In your view what could have been done differently by government and trade facilitation agencies in the management of the pandemic?

15. Are there any opportunities for the transport and logistics sector in the wake of the COVID19 pandemic?

16. Has the increased use of technology during the pandemic at the port and border points been beneficial to the transport and logistics sector?

YES

NO

17. If yes, explain.

TRANSPORTER SURVEY QUESTIONNAIRE STUDY ON IMPACT OF COVID-19 ON LOGISTICS AND TRANSPORT IN EAST AFRICA

Optional

Name:

Designation:

Company:

Telephone:

1. Has your business been negatively impacted by the COVID-19 pandemic?

YES	<input type="checkbox"/>
NO	<input type="checkbox"/>

2. If yes, how would you rate the overall impact?

Category	Rating	Check One appropriately
Minimal/nonexistent	0-5%	<input type="checkbox"/>
Low	6 – 10%	<input type="checkbox"/>
Medium	11- 20%	<input type="checkbox"/>
Above medium	20 – 30%	<input type="checkbox"/>
Severe	31 – 40%	<input type="checkbox"/>
Extremely Severe	41- 50%	<input type="checkbox"/>
Devastating	Over 50%	<input type="checkbox"/>

3. In a scale of 1 – 5 where 5 has the severest and 1 the least impact how would you rate the impact to the following:

Securing Business	<input type="checkbox"/>
Truck Turn Around time	<input type="checkbox"/>
Undertaking Tests	<input type="checkbox"/>
Receiving tests	<input type="checkbox"/>
Delayed payments	<input type="checkbox"/>
Complying with Government Agencies	<input type="checkbox"/>
Police Harassment	<input type="checkbox"/>
Insecurity	<input type="checkbox"/>

4. How would you rate the response from the following?

	Poor	Fair	Good	Very Good	No-comment
Government Agencies					
Other Private Sector Service Providers					

5. In a scale of 1 – 5, where 5 means greatest impact, how would you rate the government’s stimuli that were made to cushion the economy and the Citizens. How effective were these interventions to the transport sector?

Area	Rating
Impact on economy	
Impact on transport	
Costs of managing the Pandemic	
Impact on your operational costs	

6. How effective have the existing policies been in addressing the pandemic?

	Poor	Fair	Good	Very Good	No-comment
National Governments					
Regional Policies e.g., EAC, COMESA					

7. Has your business made any changes to its operations to mitigate the impact of the COVID-19 pandemic?

YES

NO

8. If yes, what are those changes?

Category	Code	Category	Code
Held more than usual inventory	1	Downscaled operations	5
Hired more labor	2	Changed region where raw materials are sourced	6
Working in shifts	3	Other (specify)	7
Working from home	4	Development of ICT/Automation	8

9. What were the main operational challenges encountered at the port, borders, in transit and other cargo handling related points at height of the COVID-19 pandemic?

Challenge	Code
Delays – leading to reduced turnaround time. I.e., from what to what?	1
More demurrage	2
More/new clearance procedures	3
System failures	4
COVID-19 tests	5
Relay driving	6
Quarantine costs	7
Transshipment costs	8
Cargo Escort costs	9
Accessing the port	
New Technology requirements	10
Others (specify)	13

10. With the gradual easing of the COVID-19 containment measures, have the new operational challenges that were encountered by the transport and logistics sector in 9 above reduced?

YES

NO

11. If yes, which one(s) of the eased COVID-19 restrictions have been most beneficial to the transport and logistics sector?

Challenge	Code
Reducing curfew time	1
Stopping Relay driving	2
Harmonizing COVID-19 testing for crew	3
Relaxing the requirement to escort cargo	4
Transshipment at borders	5
Border staff isolation	6
Others (specify)	7

12. By what percentage in your view did the cost of transport and related procedures increase because of the COVID-19 containment measures?

	0-15%	15-30%	30-45%	Over 45%	Do not Know
Time spent to clear and transport cargo					
Cost of transporting cargo					
Documentation & Clearance complexities					
Labor					

13. Has your business received any support from government or finance institutions to help mitigate against the effects of the COVID-19 pandemic?

YES

NO



14. If yes, please explain the nature of support.

15. In your view what could have been done differently by government and trade facilitation agencies in the management of the pandemic?

16. Are there any opportunities for the transport and logistics sector in the wake of the COVID19 pandemic?

17. Has the increased use of technology during the pandemic at the port and border points been beneficial to the transport and logistics sector?

YES

NO

18. If yes, explain.

GOVERNMENT AGENCIES

SURVEY QUESTIONNAIRE STUDY ON IMPACT OF COVID-19 ON LOGISTICS AND TRANSPORT IN EAST AFRICA

Optional

Name:

Designation:

Company:

Telephone:

1. Has your Service /business been negatively impacted by the COVID-19 pandemic?

YES

NO

2. If yes, how would you rate the overall impact?

Category	Rating
Minimal/nonexistent	0-5%
Low	6 – 10%
Medium	11- 20%
Severe	21 – 30%
Extremely Severe	Over 31%

3. What is the impact of COVID – 19 in truck turnaround time% (increase)

0%		
1 – 10 %		
11 – 20%		
21 – 30%		
31 – 40%		



4. In a scale of 1 – 5 where 5 has the severest impact how would you rate the impact OF COVID-19 to the following:

Delayed Documentation at source market	
Delayed submission of documents	
Private sector Complying with Government Agencies	
Loss of revenue	
Severe	
Reduced Volumes	

5. In a scale of 1 – 5, where 5 means greatest impact, how would you rate the government’s stimuli that were made to cushion the economy and the Citizens. How effective were these interventions to the transport sector?

Area	Rating
Impact on economy	
Impact on Border Crossing	
Impact on managing the impact	
Impact on your operational costs	

6. Has there been any notable changes in the inter government working relationship? If yes explain

7. How would you rate the response towards the pandemic from the following?

	Poor	Fair	Good	Very Good	No-comment
Government Agencies					
Private Sector Service Providers					

8. How effective have the existing policies been in addressing the pandemic challenges?

	Poor	Fair	Good	Very Good	No-comment
National Governments					
County Government					
Regional Policies e.g., EAC, COMESA					

9. Which area of your Organization has been most affected by C19?

- a) Human Resource
- b) Finance
- c) Operations
- d) Customer Care

Describe in detail.

10. What Changes did your institution have to undertake to mitigate the impact?

- a) Automate
- b) Introduce online services.
- c) Reduce human labor.
- d) MOH Protocol adherence

11. What new measures did you institute to cushion/help your staff:

12. What new measures did you institute to cushion/help you customers?

13. Does your institution have a policy on Pandemic management?

If yes: How sufficient was it to cushion your business and staff?

If not: would you consider developing on?

14. Are you aware of the Government interventions to assist the business as announced by the head of state early in the year?

Yes/No

If yes, how sufficient / helpful were they?



15. What areas would you like strengthened?

- a) Policy
- b) Regulatory Framework
- c) Operations
- d) Harmonization

16. What recommendations would you make for this and any future similar Challenge/Pandemic?

What levels of business deductions have you noted for 2020 compared to 2019?

No reduction	
Less than 10% Reduction	
10 – 20% Reduction	
21 – 30% Reduction	
31 – 40% Reductions	
41- 50% Reductions	
51- 60% Reductions	
Over 60% Reductions	

How would you compare 2019 border crossing times to 2020?

2019	2020	
	Increased	
	Reduced	

