



Africa Blue Economy Strategy

(Annex 2: Shipping/transportation, trade, ports, maritime security, safety and enforcement in the context of Africa Blue Economy)

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Acronyms

SAP	Strategic Action Plan
SAPFA	Strategic Action Plan on Fisheries and Aquaculture
FAO	Food and Agriculture Organisation of the United Nations
EU	European Union
ACP	African Caribbean and Pacific
EEZ	Exclusive Economic Zone
WTO	World Trade Organisation
TBT	Technical Barriers to Trade
INN	Illegal, Unreported, Unregulated
USA	United States of America
REDD+	Reducing Emissions from Deforestation and Forest Degradation in Developing Countries
NAPA	National Adaptation Plan of Action
UNFCCC	United Nations Framework Convention on Climate Change
BDC	Business Development Centre
TICAD	Tokyo International Conference on African Development
UNEP	United Nations Environment Programme
MEA	Millennium Ecosystem Assessment
MOWCA	Maritime Organisation West and Central Africa
UASC	Union of African Shipper's Council
PMAWCA	Port Management of West and Central Africa
PMAESA	Port Management Association of East and Southern Africa
UAPNA	Union of Port Administration of Northern Africa
IMO	International Maritime Organisation
UNCTAD	United Nations conference on Trade and Development

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Prof. Ahmed El-sawalhy

Director/Head of Mission, AU-IBAR

Context and Outlook

Context

In its current configuration, maritime trade remains dominated by arms conglomerates which unilaterally set freight rates and thus organize the shipping market as they see fit. This situation was favored by a series of measures aimed at deregulation of the sector, with the main consequence being the disappearance of the liner conferences and the abandonment of the code of conduct for liner conferences, which established, *inter alia*, a key for allocating freight and an obligation to consultation between the different stakeholders, shipping companies and shippers.

In a context of hyper competition, marked by competitive interactions generating situations of permanent imbalance, the maritime transport sector, like all sectors of the economy, is facing a rapid evolution of business conditions.

Since the liberalization of shipping in 1995, most shipping companies, particularly those in West and Central Africa, have disappeared. Shippers therefore have serious difficulties in transporting their cargoes at reasonable costs, with foreign shipping companies operating at very high freight rates.

Moreover, in most African countries, port infrastructures are obsolete and transport corridors in poor condition.

However, there have been positive developments in recent years, in 2017, the global economy and maritime trade rebounded from the historical lows of 2016, nearly a decade after the 2008-2009 economic and financial crisis. The main indicators of the economy and shipping have increased, reflecting growth in global investment, manufacturing and trade in goods. With GDP growth of 3.1% in 2017, up from 2.5% in 2016, the global economy has recovered significantly, with positive impacts on maritime traffic in Africa.

It is in this context that the African Union has decided to take initiatives to promote maritime transport, port activities, security, maritime security, as well as interstate exchanges.

In the current situation in Africa (exponential increase in population, poverty, endemic unemployment, illegal immigration) and in the desire to accelerate its development, the blue

economy is an opportunity to seize. Thus, after the November 2018 Nairobi Conference on the Blue Economy, the African Union has taken the fortunate initiative to conduct this study which covers the following topics:

- Fisheries, aquaculture, conservation and sustainable aquatic ecosystems
- Shipping/transportation, trade, ports, maritime security, safety and enforcement
- Coastal and maritime tourism, climate change, resilience, environment, infrastructure
- Sustainable energy and mineral resources and innovative industries
- Polices, institutional and governance, employment, job creation and poverty eradication, innovative financing.

Outlook

To develop maritime transport in Africa, it is necessary to implement the various instruments adopted by the international community, the African Union and the various regional and sub-regional organizations, in particular:

- The Code of Conduct for Maritime Conferences adopted by UNCTAD in April 1974, the objectives of which (in particular Article 2) are to ensure to national companies traffic participation rights allowing them to carry a significant part of foreign trade their country, to ensure a balance between the interests of shippers and shipowners and to facilitate the steady development of liner traffic,
- The Agenda 2063, strategic framework for the socio-economic transformation of the continent over the 50 years refers to the ports operations and marine transport,
- AIMS 2050, whose main objectives in the field of transport are: maritime transport and auxiliary services, port management, safety of maritime navigation, promotion of the African flag, promotion and protection of the interests of shippers , access to the sea and freedom of transit for landlocked states, development of waterways, development of maritime infrastructures, promotion of an African fleet, promotion of an African maritime code harmonized,
- The Lomé Charter 2016, aims essentially to promote and strengthen cooperation in the fields of maritime awareness, prevention through early warning and the fight against piracy, armed robbery against ships and illicit trafficking of any kind,
- The African Maritime Charter Revised declare, articulate and implement harmonized maritime transport policies capable promoting sustained growth and development African merchant fleet and to forster closer cooperation among the States Parties of the same region and between region.

Also the high population growth estimated at more than 4% for most countries, the discovery of mining resources (oil, gas, etc.) that will be exploited in the coming years, optimistic projections in the future field of agriculture.

Continuing population of the continent: The demography of Africa is the set of data and studies concerning the population of Africa at all times. From 100 million inhabitants in 1900, the population of Africa increased to about 275 million in the years 1950-1960, then to 640 million in 1990 and 1.3 billion in 2019. According to the UN, the African population will reach 4.5 billion in 2100, or 40% of humanity, against 1.3 billion (or nearly 17% of the world population) currently. This is a recent report by the UN Department of Economic and Social Affairs (DESA).

The SSA has 3% of the world's gas reserves, 4% of the oil reserves and 23% of the uranium reserves, as well as important mineral reserves including 25% of the bauxite (especially in Guinea), 56% of the cobalt (Democratic Republic of Congo) or 28% of the diamond. Some countries, such as Nigeria or Angola, have the largest share: these two countries own respectively 58% and 18% of the sub-continent's oil reserves.

In addition to these positive forecasts, global maritime trade is doing well thanks to the recovery of the world economy in 2017. With growth of 4%, the fastest growth in five years, global sea developed and attracted renewed interest in the maritime transport sector. Total volumes reached 10.7 billion tonnes, an additional 411 million tonnes, almost half of which was in solid bulk. The outlook for maritime trade is positive. UNCTAD expects a volume increase of 4 per cent in 2018, equivalent to 2017. In view of continued positive economic developments, UNCTAD expects a compound annual growth rate of 3.8 per cent between and 2023.

Although Africa still has a relatively small impact in international trade (3% of world volumes), African shipping follows the upward trend in the world. As a result, traffic in African container ports has grown at an average annual rate of 8% over the past five (5) years, compared to a global 5% change. According to a study of African ports (Ocean Shipping Consultants, 2008), container traffic doubled in the period 1995-2005. Similarly, the forecasts of the International Monetary Fund and the World Bank show an increase in the continent's traffic to 38 million TEUs in 2020 against 15 million in 2011.

The African continent is becoming more and more attractive especially for Asia with trade that accounts for a quarter of African trade. Indeed, although the European Union remains Africa's largest trading partner, China has managed to become today Africa's most important partner to the United States. According to the book by the CEA "The blue economy" published in 2016, the good traffic in the African harbors should exceed 2 billion of tons by 2040 versus 265 million in 2009. In 2017, global port activity and cargo handling of containerized and bulk cargo expanded rapidly, following two years of weak performance. This expansion was in line with positive trends in the world economy and seaborne trade. Global container terminals boasted an increase in volume of about 6 per cent during the year, up from 2.1 per cent in 2016.

If we look at the various initiatives that are being taken at the level of several African countries (modernization of ports, development of transport corridors, etc.) and competition from foreign operators for the concession of African ports, we can be optimistic about the future of shipping in Africa in Africa. There are also plans for the creation of sub-regional cabotage companies such as the SEALINK project, whose vessels will have to serve the ports of West and Central African countries.

Port and shipping - Although Africa still has a relatively small impact in international trade (3% of world volumes), African shipping follows the upward trend in the world. As a result, traffic in African container ports has grown at an average annual rate of 8% over the past 5 years, compared to a global 5% change. The traffic in the African harbours should exceed 2 billion of tons by 2063 versus 500 million in 2018. The Increased port traffic will be done thanks to the modernization of the ports that can progressively accommodate the latest generation of large ships (more than 21 000 TFE). The creation of sub-regional maritime shipping companies, of cabotage companies and the development of transport corridors with the application of freight rates will furthermore allow African shippers to transport their cargoes at reasonable costs.

In view of the above, there is optimism about the future of maritime transport and the development of port activities in Africa.

Challenges

Challenges arising from the current environment, future prospects and vision are both strategic and technical. They are strategic because they concern the economy of African countries, the social promotion of African populations and the safety and security of navigation in the seas under African sovereignty, which requires the involvement of political authorities. They are also of a technical nature, since they involve the intervention of operators in the transport sector and international trade; experts specialized in all modes of transport (maritime, road, railway) and professionals in the security, safety and security sectors, capacity building.

Strategic challenges

Carrying cargoes from African countries for import and export at reasonable rates

African shippers are facing serious difficulties in transporting their cargoes, as they do not have African shipping companies to carry out this transport. Foreign armaments apply freight rates very high, as they are alone to deserve African ports. This situation has adverse economic and social consequences. Indeed, this phenomenon has a negative impact on the competitiveness of exports and increases imports of consumer goods, hence the need to control sea freight rates and other transport costs, to promote good governance, promote training actors and ensure security and safety by creating sub-regional shipping companies, by pooling traffic rights of African countries and building new ports and modernize existing ports.

Develop interstate trade

Trade between African states is very low compared to other continents; this situation is due to several factors, inadequate transport corridors, road and rail links and the many harassments at the borders.

A set of international conventions adopted by UNCTAD, IMO, GATT / WTO, ITC, ISO. The aim is to optimize commercial activities and international transport with a view to stimulating economic development.

The proper application of these international conventions should promote and ensure the orderly expansion of trade and transport; harmonize standards and technical means of

moving goods; facilitate the formalities and procedures of trade and transport; harmonize, simplify, unify trade and transport documents; accelerate the physical operations of transport; optimize costs and deadlines; provide port and transit maritime facilities for landlocked countries; grant preferential treatment to certain categories of goods; facilitate integrated transportation; set up databases on the entire trade and transport chain.

The main conventions are: the International Convention for the Simplification of Customs Practices (1923); the Convention on the Contract for the International Carriage of Goods by Road, known as the Geneva Convention (C.M.R., 1956); the CMR Convention is very largely inspired by the Berne Convention on International Rail Transport (C.I.M.); the Customs Convention on Containers (1956-1972); the Convention to Facilitate International Maritime Traffic (FAL Convention, IMO, 1965); the International Convention on Transit Trade of Landlocked Countries (New York, 1965).

Ensuring safety and security in the African maritime area

Ships frequenting African coasts, especially the Gulf of Guinea and the Somali coast are often victims of pirate attacks. Despite the adoption of several conventions at the international level and several declarations adopted at the African level, the situation persists, which causes enormous damage to international maritime operators and has a negative impact on the services to African ports.

It is therefore necessary to implement the various conventions on safety and security, including the Lomé Charter 2016.

Technical challenges

- The implementation of international conventions and various regional and sub-regional agreements on transport and international trade, particularly those on the free movement of persons and goods
- The creation of sub-regional navigation companies to transport between African ports and those of foreign trading partners, while ensuring sub-regional cabotage traffic, which will enable the management of African countries' traffic rights, pursuant to Article 2 of the UNCTAD Code of Conduct for Liner Conferences,
- The pooling of maritime traffic rights of African countries,
- The construction of new ports to receive the latest generation ships in anticipation

- of increased traffic, help ports to equip themselves with modern infrastructure and equipment, better organize port concessions, made in a way disorderly,
- Improve port links with landlocked countries by developing interstate trade, sub-regional cabotage transport, transport corridors, simplifying and facilitating procedures and formalities and carrying out NEPAD projects for better connectivity in Africa (rail, roads, networks computer).

To implement all this, it will be necessary to create modernize African ports, create shipping companies, pool traffic rights of African countries, develop transport corridors, establish good governance including at the level of ports and to promote the training of.

The African shipping companies

Port activity in Africa is expected to reach 2 billion tons by 2040. West Africa is home to port facilities in the process of continuous modernization since the end of the colonial era. East Africa has expanded its ports, including Djibouti, which is responsible for exports to Saudi Arabia, Egypt and India. The port of Dar-Es-Salaam in Tanzania carries many imports from India and China.

In response to China's exponential demand for increased South-South trade, African shipping is recovering. The volumes transported in Africa must be multiplied by 6, or even 8, to serve the private countries devoid of sea catch. Many of them depend on their neighboring neighbors. These forecasts largely justify the creation of African shipping companies.

The African maritime traffic rights of African countries

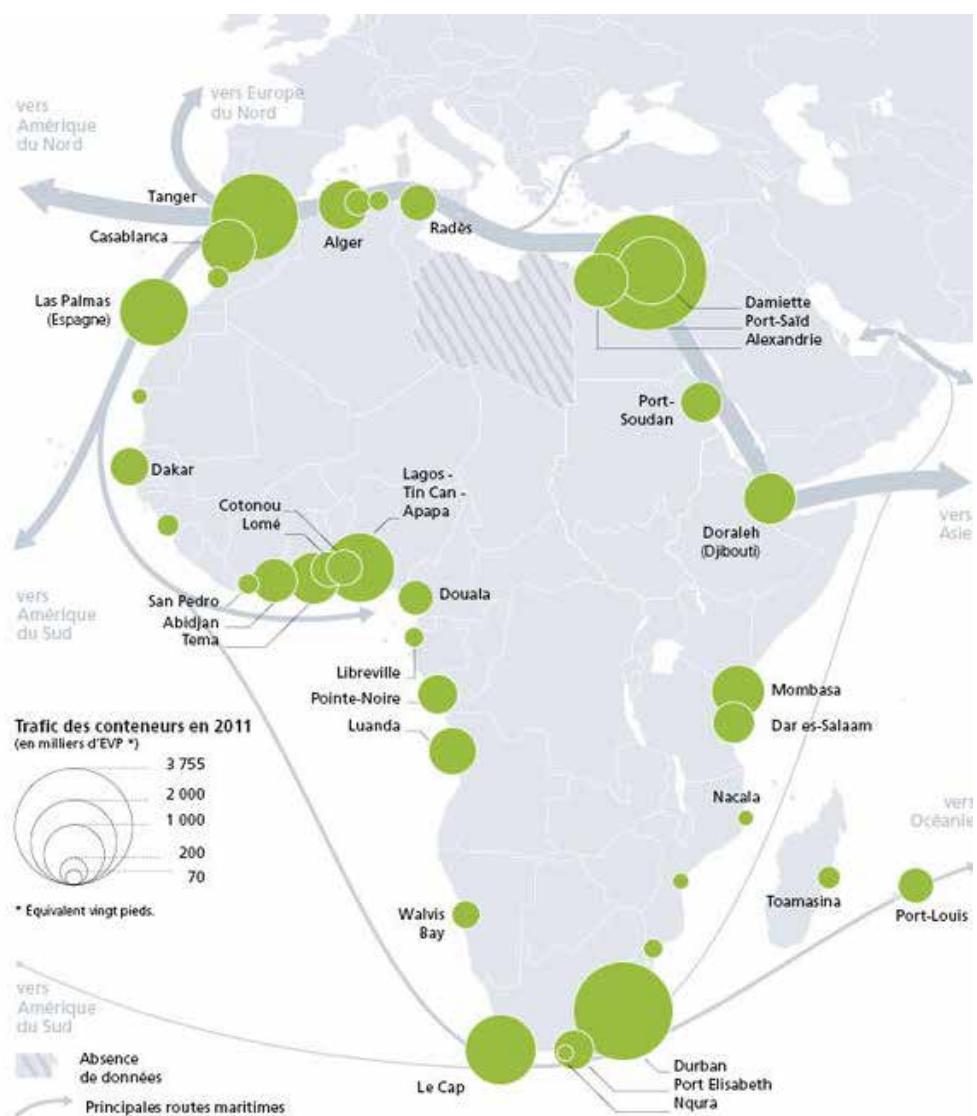
Article 2 of the UNCTAD Code of Conduct for Liner Conferences recognizes each State's 40% of its import and export traffic.

If an armament is created at the level of each regional economic community (ECOWAS, CEMAC, COMESA, SADC, IGAD, etc ...), they will be more viable, because having substantial financial resources, quality resources, adapted naval means , and exploiting the traffic rights of several states. It will be necessary to avoid the partitioning, these armaments although they are regional should evolve in term on the continental level.

It should be noted that UEMOA, through the adoption of Regulation No. 2/2008 / CM / UEMOA of 28 March 2008, concerning maritime transport “has already embarked on this direction. This text defines the conditions for participation in traffic, the status of Community shipowner, the status of foreign shipowner, inland maritime transport, intra-Community maritime transport and international maritime transport. This Regulation defines access to traffic as “access to traffic: the ability of a shipping company to load or unload cargo in a port of a Member State”.

Modernization of ports

In anticipation of the increase in treasure in view of the future exploitation of mineral resources in Africa, the increase in population and the development of agriculture, African ports must be modernized in order to accommodate the latest generation ships.



The governance of the sector and coordination of the activities

It is necessary to strengthen the coordination bodies of the blue economy in each state and to create them in states that do not yet have them. It is also necessary to strengthen the institutional support of the States to the organizations of the maritime sector (Maritime Organization of West and Central Africa MOWCA, the management organization of the ports of West Africa and the center "AGPAOC", East Africa "PMAESA" and North Africa "UAPNA" and ensure coordination, Union of African Shipper's Council "UCCA"), etc.

The training of actors

It has been noted that there is a lack of training for staff in the maritime transport sector, despite the existence of maritime academies, institutes and schools that can provide this training.

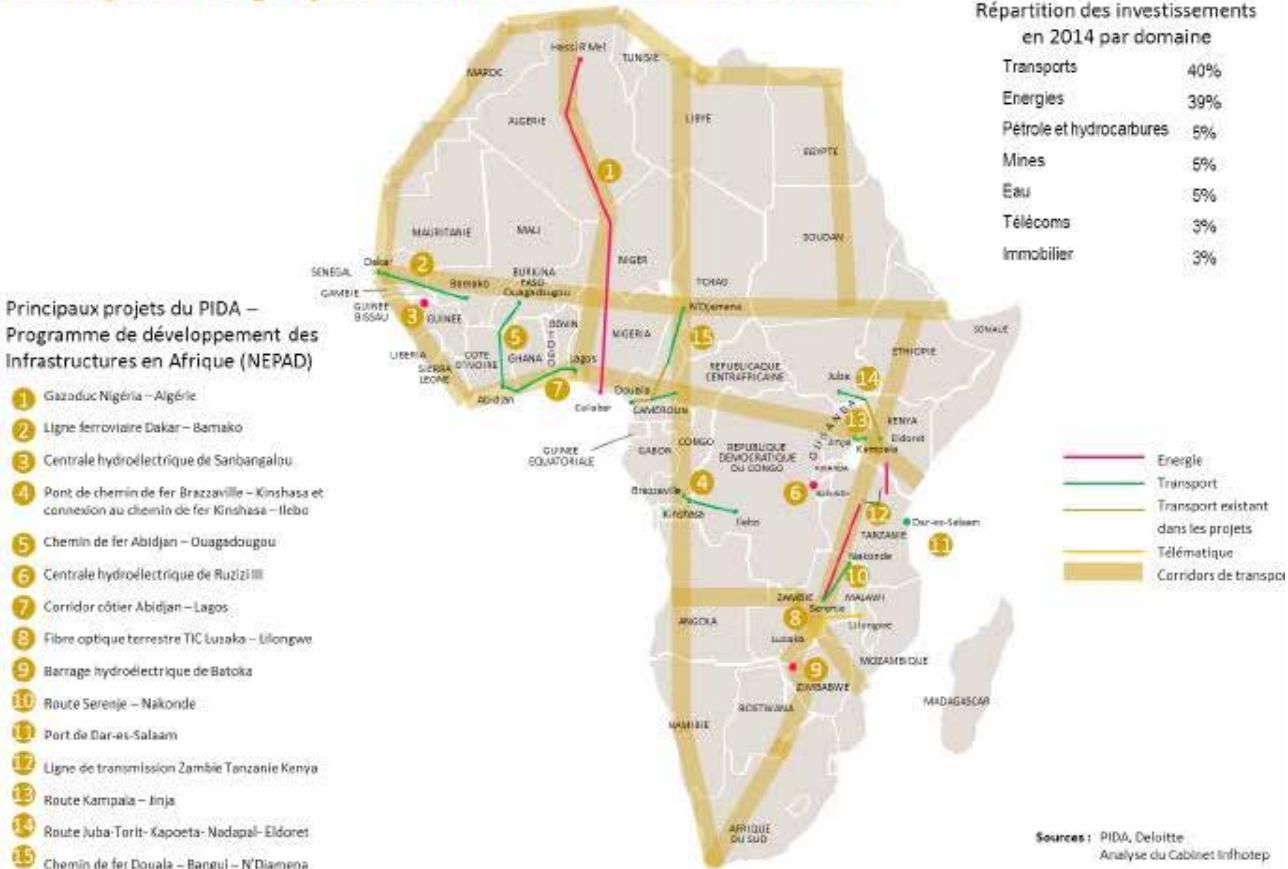
It is therefore necessary to strengthen and modernize universities, schools, institutes and specialized academies with financial support from States and regional and international training institutions.

The situation of transport corridors

The current corridors do not connect all the countries of the continent and are insufficiently developed, which does not favor the movement of goods and people between states. It should be noted, however, that many initiatives are being taken, particularly at NEPAD level to create new corridors and to develop existing ones.

The PIDA, which met from 24 to 26 September in Malabo, has embarked on major projects for the realization of transport infrastructure in Africa (rails, roads) and to promote treansport by inland waterways.

L'Afrique de demain : Emergence de projets en faveur des infrastructures



The sub-regional cabotage transport

Cabotage allows the movement of cargoes in large quantities, thus promoting interstate exchanges, especially as many states have ports on the Atlantic coast and the Mediterranean. Despite the unfortunate experiences in West Africa (Satomar and Ecomarine), it is unavoidable. There are many inland waterways in Africa that are used for cabotage, which could help promote interstate trade, especially since waterborne transport can carry large volumes.

The creation of national and regional cabotage shipping companies with a view to promoting intra-African trade and facilitating the economic and socio-economic integration of the continent should be encouraged.

The application of conventions and agreements on free movement of persons and goods and standards

For the implementation of this whole process, it is necessary to implement the various regulations (international conventions, regional and sub-regional agreements, memoranda of

understanding, standards, etc.), most of which have been listed above). Standards will need to focus on those that have been prescribed in the area of road, rail, security, safety and capacity building.

Strategic Goals

Considering the current situation in the field of maritime transport, ports, inter-State exchanges, security, safety and the enforcement of regulations, it is necessary to take initiatives to enable African shippers to transport their cargoes at reasonable cost and develop interstate exchanges.

To achieve this, you must:

- develop existing ports and create new ports capable of receiving the latest generation ships,
- create sub-regional navigation companies,
- create maritime cabotage companies,
- control sea freight rates,
- promote good governance of the sector, including ports,
- promote the training of actors.

International and continental legal instruments exist (the UNCTAD Code of Conduct for Maritime Conferences of 1974, AIMS 2050, the Agenda 2063, the revised African Charter for Maritime Transport, the Lomé 2016 Charter on Security and Safety).

Summary of Strategic Goals

Table I: Summary of Goals and Objectives

Goals	Goal 1 Carrying cargoes from African countries for import and export at reasonable rates	Goal 2 Develop interstate trade
Approach	Form part of a dynamic partnership, both at a regional level, in close collaboration with UA States, and at an international level, through cooperation with various institutions and development partners to create synergy and build capacities.	
Objectives	I.1 Control sea freight rates and other transport costs	I.1 Creation and development of transport corridors
	I.2 Promote good governance of the sector	2.2 Develop sub-regional cabotage transport
	I.3 Promote the training of actors	2.3 Application of conventions and agreements on free movement of persons and goods and standards
	I.4 Ensure security and safety in the African maritime area	

Detailed Presentation of Strategic Goals and Specific Objectives

Table 2: Presentation of objective 1 of Goal I

Goal I - Carrying cargoes from African countries for import and export at reasonable rates			
African shippers are facing serious difficulties in transporting their cargoes for import (manufactured goods and consumer goods), as they do not have African shipping companies to carry out this transport. Foreign armaments that apply very high tariffs as they see fit service most African ports.			
Objective I - Control sea freight rates and other transport costs			
Freight rates and transport costs are very high in Africa, especially since the liberalization of shipping in 1995			
Targets	Actions	Coordinator and Partnership	
I.1 Encourage the creation of sub-regional navigation companies	<ul style="list-style-type: none"> Evaluate the shipping companies that have disappeared and seek funding from new companies 	C: UA P: UNCTAD, MB, MOWCA, UASC, OUE, CEDEAO, CEMAC, SADC, COMESA, CEN-SAD	
I.1 Reaffirm ownership of traffic rights and pool them	<ul style="list-style-type: none"> Make the necessary arrangements at the level of the African Union, as only one member country cannot impose itself before the powerful armaments. 	C: UA P: MOWCA, AUSC, CEDEAO, CEMAC, SADC, COMESA, CEN-SAD	
I.2 Build new ports and modernize existing ports.	<ul style="list-style-type: none"> Promoting transparency in the management of port activities, particularly in the formulation, negotiation and monitoring of the concession agreements, by implementing an African charter of good governance, particularly on concessions, adaptation of port procedures to international norms and standards, Promote transparency in the management of port activities 	C: AU P: MOWCA, 3A, UASC,	

Table 3: Presentation of objective 2 of Goal I

Goal I - Carrying cargoes from African countries for import and export at reasonable rates			
Objective 2 : Promote good governance of the sector and coordination of sector activities			
It is necessary to strengthen the coordination bodies of the blue economy in each state and to create them in states that do not yet have them. It is also necessary to strengthen the institutional support of the States to the organizations of the maritime sector			

Targets	Actions	Details and time frame	Coordinator and Partnership
2.1 Strengthening the coordination bodies of the blue economy and creation in states that do not yet have them	Implementation in each AU member state	2020/2030	AU, UNCTAD, MOWCA, UASC
2.2 Strengthen the institutional support of States to organizations in the sector and ensure coordination.	Establishment of a charter of good governance of the sector	2020/2021	AU, UNCTAD, MOWCA, UASC

Table 4: Presentation of objective 3 of Goal 1

Goal 1 - Carrying cargoes from African countries for import and export at reasonable rates			
Objective 3- Promote training of actors			
It has been noted that there is a lack of training for players in the maritime transport sector, despite the existence of maritime academies, institutes and schools that can provide this training.			

Targets	Actions	Details and time frame	Coordinator and Partnership
Erection of Center of Excellence, Professionalization of actors, capacity building and employability of young people	Strengthening and modernizing universities, schools, institutes and specialized academies with financial support from States and regional and international training organizations	2020/2030	AU, UNCTAD, MOWCA, PMAWCA

Table 5: Presentation of objective 4 of Goal 1

Goal 1 - Carrying cargoes from African countries for import and export at reasonable rates			
Objective 4- Ensure security and safety in the African maritime area			
The African maritime space is under a permanent threat of piracy, security in the Gulf of Guinea and the Somali coast. It is therefore urgent to take measures to curb these threats. It is for these reasons that the international community, on the one hand, African countries on the other hand have taken many measures that should be implemented, including the Lomé Charter of 2016 on safety and security maritime.			

Targets	Actions	Details and time frame	Coordinator and Partnership
Strengthening cooperation between the structures in charge of safety and maritime safety, Implement the safety and security conventions, including the 2016 Lomé Charter	Make available the necessary funds to the competent bodies	2020/2021	AU, MOWCA, IMO,

Table 6: Presentation of objective 1 of Goal 2

Goal 2 - Develop interstate trade			
Objectif 1- Creation and development of transport corridors			
The current corridors do not connect all the countries of the continent and are insufficiently developed, which does not promote the movement of goods and people between states.			

Targets	Actions	Details and time frame	Coordinator and Partnership
Evaluate each transport corridor, advantages, disadvantages	<ul style="list-style-type: none"> • set up one-stop-shops at ports and border posts • simplify procedures and formalities for transit and transhipment in ports, 	2020/2021	AU, UNECA, UASC
Evaluate the impact and the need for new corridors			

Targets	Actions	Details and time frame	Coordinator and Partnership
	<ul style="list-style-type: none"> • professionalize the players in the road transport sector and renew the truck fleet, • contribute to the renewal of the truck fleet, • increase awareness and implementation of the ZELECAf, • Ensure the facilitation and smooth flow of interstate traffic, develop and strengthen road and rail corridors, • fight against abnormal practices on corridors 		

Table 7: Presentation of Objective 2 of Goal 2

Goal 2: Develop interstate trade
Objectif 2: Develop sub-regional cabotage transport
Cabotage allows the movement of cargoes in large quantities, thus promoting interstate exchanges, especially as many states have ports on the Atlantic coast and the Mediterranean. Despite the unfortunate experiences in West Africa, it is unavoidable.

Targets	Actions	Details and time frame	Coordinator and Partnership
Evaluating unhappy experiences (ECOMARINE and SATOMAR in West Africa) and examine the feasibility of sub-regional cabotage companies	Conduct a study	2020/2030	AU, MOWCA, UASC, 3A,

Table 8: Presentation of Objective 3 of Goal 2

Goal 2: Develop interstate trade
Objectif 3- Application of conventions and agreements on free movement of persons and goods and standards
Many international conventions (of Almaty, etc.) and regional and sub-regional agreements allowing the free movement of people and goods exist, but are hardly applied. It is therefore necessary to update, implement and examine the feasibility of sub-regional cabotage companies.

Targets	Actions	Details and time frame	Coordinator and Partnership
Identify conventions and agreements	Ratify and implement conventions and agreements	2020/2030	AU, UASC, CEDEAO, CEMAC, SADC, COMESA Conduct a study

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