RESOLUTIONS OF THE STAKEHOLDERS' CONSULTATIVE FORUM FOR NATIONAL AND REGIONAL SHIPPING LINES AND MARITIME ADMINISTRATION HELD FROM 27TH FEBRUARY 2023 TO 1ST MARCH 2023 AT FOUR POINTS BY SHERATON HOTEL IN DAR ES SALAAM, TANZANIA

PREAMBLE

We, Stakeholders of the National and Regional Shipping Lines, who met from the 27th of February to the 01st of March 2023, comprising the following institutions:

United Republic of Tanzania: Ministry of Works and Transport (Transport), Tanzania Shipping Agencies Corporation (TASAC), Zanzibar Maritime Authority, Songoro Marine Transport Ltd, Marine Services Company Ltd (MSCL), SINOTASHIP, ZAN FAST Ferries, Express Shipping & Logistics (EA) Ltd and Ikraam Sealine.

Republic of Kenya: Kenya Maritime Authority (KMA) and LOTS Shipping East Africa Ltd.

Republic of Uganda: Uganda Railways Corporation (URC).

Democratic Republic of Congo: Lignes Maritimes Congolaise (LMC), Office of Multimodal Freight Management (OGEFREM) and Kalemie Ship Owners Association.

Republic of Burundi: Autorité Maritime, Portuaire et Ferroviaire (AMPF) and ARNOLAC Cargo Shipping.

Nigeria: African Shipowners Association (ASA).

Ivory Coast: Berakah-Rehoboth Eagle Shipping Company International (BRESCI).

RECOGNIZING that Shipping is responsible for moving over 90% of global trade each year connecting very distant importing centers to exporting ports at the lowest rate per metric ton moved by any transport mode and realizing that the loaded volumes of cargo are increasing at about 3% annually;

APPRECIATING the importance of shipping in moving basic commodities across the world and the movement of bulk and heavy cargo like minerals and raw materials and staples like grain around the world is only made possible by shipping;

ACKNOWLEDGING that as a mode, water transport is the greenest of all modes of transport with the mega ships only emitting 3grams of carbon dioxide per ton-kilometer moved as compared to road which emits 80grams per ton-kilometer and that with the global drive of cutting back on greenhouse emissions, shipping is poised to even go greener in the near future;

OBSERVING that over 1.3billion tons of cargo is shipped in and out of Africa as a continent and that almost all of it is carried by multinational liners domiciled outside Africa and that in particular, over US$20billion is paid annually in freight for the import and export of cargo in the region with little or no share going to national and regional shipping lines;

ADMITTING that of the countries with the most merchant ships, the top suppliers of merchant ships' seafarers and the biggest ship building states, Africa does not have any and that much as Liberia is the second largest flag state by tonnage, almost all the vessels flying her flag are not owned by Africans;

BEING AWARE that the existing national and regional shipping lines are operating more on inland waterways and as feeder lines and that their capacities are limited, access to sustainable financing and manning to venture fully into scaled international shipping trade and that in some circumstances where there is sufficient cargo to move and government protection, the existing carrying capacity would only handle less than 10% of the cargo with the rest being handled by established multinational liners;

ACCEPTING that Shipping and Maritime Transport is a complex and highly technical segment whose initiatives require the expertise of institutions like ISCOS to coordinate and need a multi-stakeholder approach to identify industry gaps, investigate existing opportunities, highlight emerging issues and conceive mechanisms of addressing any bottlenecks in a collaborative manner;

CONVINCED that meaningful collaboration amongst national and regional shipping line stakeholders can enhance exchange and sharing of information at operational and policy making levels, facilitate the harmonisation of legislation, polices, practices and procedures across the region that would attract requisite investment in the subsector, consolidate ideas of the formation and operation of a regional and national shipping lines and can indeed be a useful tool for driving a culture of continuous improvement of the operations of the national shipping lines;

APPRECIATING that there is enough regional cargo to support the meaningful operation of regional and national shipping lines if regional stakeholders sufficiently collaborated and offered competitive freight rates and levels of service to the shippers who understand that supporting the local and regional players carries much more benefits to the local and regional industry that they wish to see develop and become more competitive;

NOTING that ISCOS' mandate is to promote, protect and coordinate the shipping and maritime interests of Member States and the entire East, Central and South African region, ISCOS has conducted numerous studies intended to guide industry growth and is leading the development of a regional maritime transport policy which intends to fast track the development of a robust regional maritime and shipping industry;

HIGHLIGHTING the following as some of the issues affecting the operations and hindering the growth of the national and regional shipping lines as observed by the stakeholders attending this consultative forum organized by ISCOS between 27th February – 01st March 2023 of the national and regional shipping lines together with Maritime Administrations:

i. Lack of a dedicated agency to provide coordination of the national and regional shipping lines in the region with the aim of highlighting and advancing industry emerging issues for possible resolution and promoting industry development;
ii. There was a lot of cargo especially raw materials generated in the region for export that was not finding its final markets due to the lack of local and regional shipping capacity;
iii. The per capita seaborne trade generated and registered on the African continent and in the region in particular was still very low compared to other markets lagging at a meagre 0.9tons compared to for example the Oceania with 37tons;
iv. National shipping lines were largely operating in silos with each having to build and operate its own systems and supporting infrastructure with very limited cooperation amongst them;
v. Efforts aimed at establishing and operating a regional shipping line with the creation of the East African National Shipping Line (EANSL) collapsed ten years after inception largely owing to geopolitical differences amongst the players;
vi. The region is far from key import and export markets, is not as well connected to global shipping networks like other regions in the world, is very dependent on imports for basic commodities, such as food and energy and has a narrow economic base;
vii. African countries are not anywhere near the major ship owning states let alone being major seafarer exporting states or ship building nations. This is keeping the continent far behind renown maritime nations and regions especially in Europe and Asia;
viii. The existing national shipping lines were operating with small vessels with predominantly national and feeder operations focus and little emphasis on international shipping leaving this space to be dominated by established multinational liners;
ix. The national and regional shipping industry is quite young and vulnerable to force majeures like pandemics and regional conflicts as witnessed by the Covid 19 and the Ukraine-Russia conflict respectively which distorted shipping routines and grossly affected the region with very limited supply of basic commodities;
x. The Africa Continental Free Trade Area (AfCFTA) envisaged free movement of people and most of the goods across the continent but this is yet to materialize as many barriers on the free movement of people still exist even amongst states belonging to the same regional blocs. This was highlighted as a potential deterrent to intra-regional trade that could in term affect regional shipping;

xi. LMC was observed to be operating without vessels notwithstanding the availability of cargo assigned to the shipping line by decree. This was due to the non-replacement of the old fleet that had been disposed of some twenty years ago which was highlighted as grossly affecting optimization of its potential into emerging markets;

xii. National shipping stakeholders were observed to be doing a lot of work in the recent past in terms of rehabilitating and developing new port infrastructure, access rail and road systems, deepening of port areas and increasing the carrying capacities by acquiring new vessels and rehabilitating existing ones to reinstate their carrying capacities. This was however noted to be mainly on regional inland waterways;

xiii. MSCL was planning to venture into merchant shipping in the medium to long term after consolidating her operations in the regional inland waterways;

xiv. The Ethiopian shipping line was commended for its efforts to grow its fleet;

xv. The existence of maritime cabotage restrictions was observed in the region. These are derived from protectionist trade policies, which aim to restrict the majority of the national volume of seaborne traffic to the national transport market in order to avoid currency outflows, secure income for the domestic fleet, promote national shipyards and to retain sufficient transport capacities in times of need with the main objective of promoting employment of the national merchant fleet;

xvi. There is no regional policy to guide shipping and maritime operations in the region. This leaves individual regional states to develop own national guidelines that are not fully harmonized and could often be found to contradict each other.

THE STAKEHOLDERS NOW THEREFORE, RESOLVE AS FOLLOWS:

1) STAKEHOLDERS OF THE NATIONAL AND REGIONAL SHIPPING LINES

a) To fast track the creation of a private sector led regional shipping line inline with the regional aspirations of increasing export productivity, reducing logistics costs, enhancing local carrying capacity of own cargo, realising economies of scale in regional shipping operations, creating employment opportunities and building regional capacity;

b) Advocate for the development of a regional cabotage framework that allows regional owned vessel to operate freely across the region to fill existing capacity gaps that may not be fully covered by national players;

c) National and regional shipping lines to work closely with ISCOS and ASA to explore existing modalities of acquiring ships for operation within the region and international shipping;

d) Flag states working with other stakeholders to encourage the growth of the maritime training industry in the region to be able to fill the existing manning gaps in merchant shipping;

e) National and regional shipping lines and agencies to always give priority to regional shipyards to supply their vessels' requirements. This would build the local ship building capacity which is a key component in the maritime and shipping industry;

f) To continuously incentivise the business community to increase export-oriented trade which would ensure that national and regional shipping lines have sufficient cargo volumes to ensure capacity utilisation. This would reduce shipping costs for shippers but would also attract more investment in the shipping industry to better serve the region;

g) Maritime Administrations in collaboration with other stakeholders need to incentivise the deliberate development of national and regional shipping capabilities through policy and legislation;

h) Support national shipping lines planning to venture into coastal and international shipping;

2) ISCOS

a) To ensure policy harmonisation across the entire region, ISCOS should fast track the development of a regional maritime transport policy in consultation with regional industry players with the aim of eliminating duplication of efforts, harmonising industry compliance requirements and facilitating more collaboration in shipping at a regional level;

b) To take centre stage in the conceptualisation and development of a regional shipping line by leading the requisite consultative engagements amongst stakeholders in the region and elsewhere and facilitating exchange of views and ideas;

c) Fast track the formation and growth of a regional shippers' council which will drive investments that generate the much-needed cargo for export and create local demand for requisite imports which would be carried by the regional shipping line increasing the seaborne trade per capita of the region;

d) Actively engage and participate in the implementation of the AfCFTA, the revised African Maritime Charter, the Africa's Integrated Maritime Strategy (2050) and all other relevant policy and legal instruments which focus on building collaborations for the promotion of trade and hence shipping across the continent;

e) ISCOS to study the shipping business models used by LMC and the Ethiopian Shipping line and see if they could be adopted by other countries especially land-linked;

f) Continue building sound collaborations with like-minded regional and other organisations whose aims are to contribute to the growth of the shipping industry in the region;

g) Carry on providing a platform for structured consultations to be conducted by national and regional shipping stakeholders in collaboration with other regional stakeholders with the aim of building consensus on the direction to take pertaining a regional approach to the shipping industry and building cooperation amongst shipping stakeholders;

h) In collaboration with ASA, AFREXIM Bank and any other financing partners conduct a study on regional shipping that would inform decision making for example studies on origin – destination cargo potentials in the region, ocean freight rates, maritime trade practices, multimodal networks, exporting and importing patterns of regional states that would indicate international shipping volumes and the potential for regional shipping lines to exploit;

i) Conduct sensitisation on the different forms of ship ownership, drive private sector involvement in ship ownership and encourage strategic partnerships with international shipping players to build local capacity;

j) To take lead in the monitoring and evaluation of the implementation of all the resolutions made by this forum.

LIST OF DELEGATES FOR THE CONSULTATIVE FORUM WITH NATIONAL AND REGIONAL SHIPPING LINES, HELD AT THE FOUR POINTS BY SHERATON HOTEL IN DAR ES SALAAM, TANZANIA FROM 27TH FEBRUARY 2023 TO 1ST MARCH 2023

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