Southern African and Islands Virtual Meeting, UK Hydrographic Office (UKHO), 3 – 4 February 2021

Port Management Association of Eastern & Southern Africa (PMAESA)

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PMAESA Secretary General

Outline

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- Objectives
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- Committees
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PMAESA Introduction

- Established in 1973 under the auspices of the United Nations Economic Commission for Africa (ECA),

- A non-profit, inter-governmental organization made up of Port Operators, Government Line Ministries, Logistics and Maritime Service Providers and other port and shipping stakeholders from the Eastern, Western and Southern African and Indian Ocean regions,

- Has 25 countries under its jurisdiction

- Governed by a Council and the Board of Directors (6 – representing Coastal Countries, Island Countries and Land-Linked Countries) – currently chaired in Namibia

Mission

PMAESA seeks to promote and nurture best practices among member ports by creating an enabling environment for exchange of information and capacity building to contribute to the economic development of the region.

Vision

To be the center of excellence in regional integration in transforming our ports into global competitive platforms for international trade.

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PMAESA Objectives

- Strengthen relations among stakeholders

- Promote trade facilitation, regional cooperation and integration

- Promote Influence policy framework

- Works towards improving conditions of operation and management of ports in its region of coverage with a view to enhance their productivity

- Maintain relations with other port authorities or associations, regional and international organizations and governments of the region to hold discussions on matters of common interest

- Co-ordination and facilitation of activities

- Create knowledge and awareness

PLATFORM FOR EXCHANGE OF INFORMATION, IDEAS AND BENCHMARKS

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Objectives

- Enable relationships among member ports with a view to promoting regional cooperation and subsequently regional integration.

- Framework for exchange of information and ideas among members and to enable members to interface with one another from the port, transport and trade spaces to exchange benchmarks and best-practices.

- Working towards improving conditions of operation and management of ports (coastal and inland) in its region of coverage with a view to increase their efficiencies.

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Continental Outreach

PAPC
Pan African Association for Port Cooperation

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PAPC - PROFILE

Established 1999 PAPC is the apex continental body and federation of the three sub-regional port Associations in Africa - Port Management Association of West and Central Africa (PMAWCA), Port Management Association of East and Southern Africa (PMAESA) and the Union of Port Administrations of Northern Africa (UAPNA)

Established to harmonize regional work & create continental pool of port Authorities to ensure that good lessons and best practices in one sub-region could be very efficiently and harmoniously shared and replicated all over the continent.

Through its biannual **PAPC Conference**, PAPC has promoted a continent-wide forum for ports and the maritime business community to meet, share experiences and deliberate on the challenges and prospects of the port, maritime transport and trade sector of the continent.
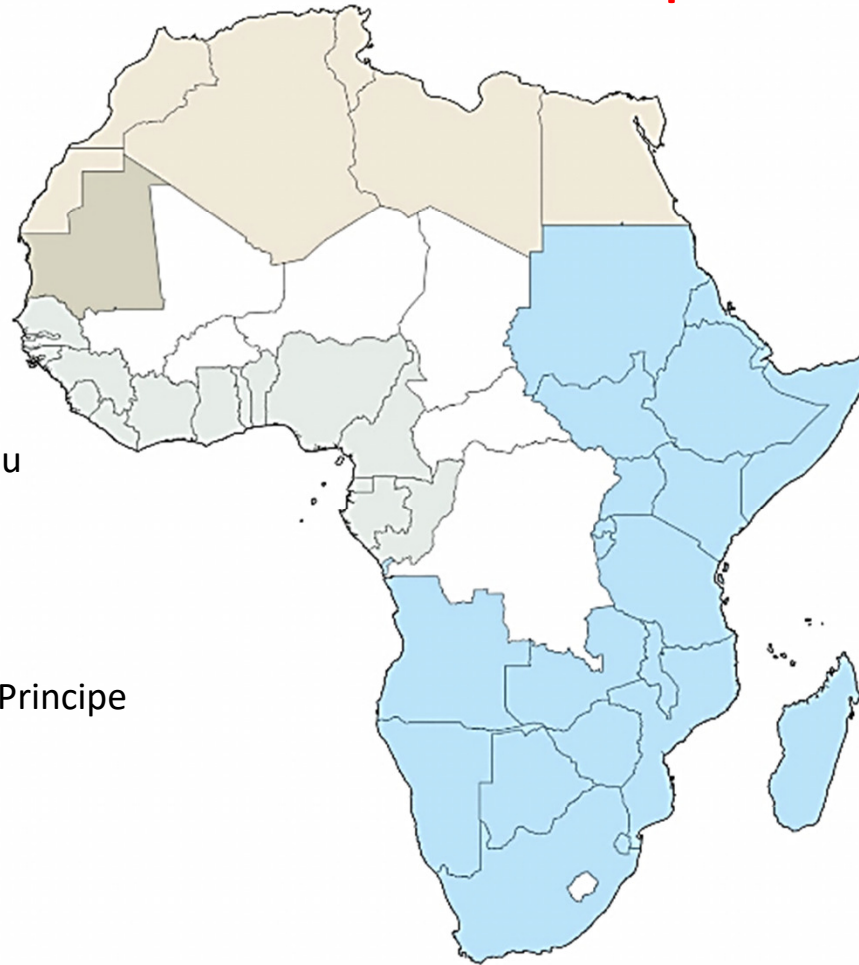
Pan-African Association for Port Cooperation (PAPC)

UAPNA Members = 8

Algeria	Morocco
Egypt	Sudan
Libya	Tunisia
Mauritania	Western Sahara

PMAESA Members = 25

Angola	Namibia
Botswana	Rwanda
Burundi	Seychelles
Djibouti	Somalia
Eritrea	South Africa
Ethiopia	South Sudan
Kenya	Sudan
Lesotho	Swaziland
Madagascar	Tanzania
Malawi	Uganda
Mauritius	Zambia
Mozambique	Zanzibar
	Zimbabwe

PMAWCA Members = 18

Angola	Guinea Bissau
Benin	Ivory Coast
Cameroon	Liberia
Cape Verde	Mauritania
Congo	Nigeria
Equatorial Guinea	Sao Tome & Principe
Gabon	Senegal
Gambia	Sierra Leone
Ghana	Togo
Guinea (Conakry)	

Legend:

- PMAESA Region
- PMAWCA Region
- UAPNA Region

Darkened shaded areas imply membership to 2 associations

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Membership

Port Authorities

- Port de Djibouti S.A.
- Kenya Ports Authority
- Sea Ports Corporation (Sudan)
- Transnet National Ports Authority (South Africa)
- Namibian Ports Authority
- Tanzania Ports Authority
- Port of Lobito Authority (Angola)
- Société du Port à gestion Autonome de Toamasina (Madagascar)
- Mauritius Ports Authority
- Zanzibar Ports & Harbors Corporation
- Seychelles Ports Authority

Railway Operators

- Eswatini Railway

Line Ministries (Landlinked & coastal)

- Ministry of Transport & Public Works - Republic of Uganda
- Ministry of Transport & Communications - Republic of Zambia
- Ministry of Transport - Federal Republic of Ethiopia
- Ministry of Transport - Republic of Malawi
- Ministry of Transport - The State of Eritrea

SA

Membership – cont'd

Marine Transport Sector Service Providers (Private Sector & Gov't affiliated)

- Marine Data Solutions
- Sanmar Shipyards (Turkey)
- Marine Crew Services (South Africa)
- Zambia Cargo & Logistics Limited - Tanzania
- Abu Dhabi Marine Services (SAFEEN)

Maritime Regulators

- TASAC (formerly SUMATRA) - Tanzania

Terminal Operators

- Maputo Port Development Company
- DSM Corridor Group (Tanzania)
- Bid Freight Port Operations (South Africa)
- Transnet Port Terminals (South Africa)

Strategic Partners

- DMG Events (formerly Hypenica) – South Africa

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PMAESA Council

- The PMAESA Council is the supreme policy making organ of the association and consists of the full members of the Association.

- The Council meets every year to deliberate on activities of the association in the past year and approve work-plan for the next year.

PMAESA Board

- **Chairman** – TRANSNET (South Africa)
- **1st Vice Chairman** – Vacant
- **2nd Vice Chairman** – Seychelles Ports Authority (Seychelles)
- **Treasurer and Ex Officio Board Member** – Kenya Ports Authority (Kenya)
- **1st Member** – Sea Ports Corporation, Sudan
- **2nd Member and Immediate Past Chair** –Mpulungu Harbour Corporation (Zambia)

PMAESA Committees

Composed of representative from various member states and play a major role in the management of the Association.

Committees develop policies on the various issues pertaining to the Secretariat and advise the Board on the implementation of new policies that helps PMAESA achieve its objectives.

Port Operations, Marine Protection, Safety and Security A Technical Platform to support PMAESA to attain its strategic objectives with specific emphasis on Port Operations, Maritime Safety, Maritime Security and Protection of the Marine environment

Communications Defines & implements the communications/marketing strategy of the Secretariat, Manages the Secretariat communication channels

Finance Defines and implements the Secretariat funding strategy; provides oversight into financial matters

Legal Advisory role to the Secretariat to mitigate exposure to risk

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PMAESA Events

Annual conferences, quarterly workshops are convened to discuss issues affecting the regional maritime industry/sector

Areas of Focus

1. Standardisation, collation and harnessing of information
2. Provide competence and expertise to members
3. Collaborative relationships
4. Promote development of women in the Maritime Sector
5. Promotion of the fishery industry
6. Influence policy framework
7. Promotion of the tourism – cruise and aquaculture
8. Maritime safety and security
9. Alignment of initiatives to drive the achievement of
   - AU AIMS 2050
   - UNECA SRCM business plan
   - UN Almaty Programme of Action (Addressing special needs of landlocked developing countries)

Achievements in the past 5 years

- Implemented governance structures (Annual audit)

- Alignment to Kenyan laws governing employment and welfare

- Strengthened cooperation with development partners via outreach initiatives (World Bank, DBSA, ZDA, KNCCI, JKUAT)

- Enhanced visibility through **social media** and **partnerships (MoU)**

- Expanded mandate to cater inland maritime and transport stakeholders (Integrated Cruise Itineraries, Inland Ports)

- Registration of new members – Transnet Port Terminals, MOWT Uganda, EswatiniRail

- Facilitated field visits, best practise exchange initiatives

Achievements – cont'd

- Heightening the profile of landlinked countries in the sub-region (ex. Swaziland, Uganda and Zambia). Landlinked countries are vital nodes in the trade and transport value chains.

- Registration of Cruise Africa to look at expanding the cruise experience from coastal areas to the hinterland.

- Monitoring development and performance of port in the region – advocating for Harmonized Port Performance Indicators, The Port Awards Ceremony (CODEX) to recognize the roles and performance of ports.

Ongoing initiatives/programmes

World Bank/SSATP (Africa Transport Policy Program)
- Port Concession Guidelines
- Study on Ability of Ports to produce PPIs

UNECA
- Mainstreaming Intelligent Transport Systems

IMO
- Level of compliance to the SOLAS VGM (Verified Gross Mass) Requirement for Export Containers– National Workshops
- Maritime Technology Cooperation Centres (MTCC) Africa

Trade Mark East Africa
- Development of dedicated cruise terminal - Mombasa
- Implementation of Joint Operations Center (JOC) concept in the Northern Corridor

International Association of Maritime Economists Conference (IAME) 2018 Conference

UK AID/University of Cardiff
- Safe Seas Project

Ongoing initiatives/programmes – cont'd

Cruise Africa
- Yacht Lottery Competition
- Cruise Africa brand
- UNWTO

Training and Development programs – collaboration with:
- Arab Academy for Science, Technology & Maritime Transport
- JKUAT (Kenya)
- Galilee Inst. (Israel)
- Univ. of Brussels (VUB)

Main Challenges of Members

- Demand often out-stripping capacity
- Lack of investment in "soft" initiatives (ICT, Training, Harmonization, Policy review)
- Value chain actors operating in silos (lack of integration)
- Moderate uptake of data driven initiatives (for smart decisions)
- Political patronage
- The sector is largely gender biased in the region

Way forward

- Need to create capacity ahead of demand – achievable if all actors work together, embrace 'SMART' port & corridor concepts, adhere to internationally accepted best-practice

- Embrace 'big data': ensure key performance indicators are captured, analyzed and disseminated consistently and frequently – information is power

- Encourage more women to participate in the maritime transport sector

- Combat corruption

Current situation in brief

- majority of African Economies being import reliant, ports are looked upon not as trade enablers but for movement of goods and services with a bias towards bringing in imports or finished products.

- Incoherent infrastructure investment programs which look at sections of the value chain instead of holistic approaches.

- Vessels are getting bigger and bigger. Land for ports is prime and it is getting congested due to proximity to urban areas e.g. Durban, Mombasa and Dar Es Salaam...

- Can African countries cope?

Best connected countries in Africa – overarching factors

In Africa, geography and port reforms emerged as critical factors.

- Best-connected countries in Africa are those at its corners – Morocco, Egypt and South Africa.

- Western Africa has relatively low connectivity because it doesn't lie at the crossroads of major north-south or east-west shipping routes.

- Mombasa and Dar es Salaam connect Burundi, Rwanda and Uganda to overseas markets through dedicated corridors, however they remain highly congested.

- Low connectivity makes merchandise trade costly and uncompetitive. Many small island developing states (SIDS) face a vicious cycle where low trade volumes discourage investments in better maritime transport connectivity.

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Port calls and port turnaround times UNCTAD Report – Liner Connectivity

- Container vessels have the lowest turnaround times. In 2018, a ship spent a median time of 23.5 hours in ports.

- Economies with fastest turn-around times are advanced ones with large volumes or small ones that handle low cargo volumes at each port call.

- Bottom 10 countries are all developing countries or least developed countries.

- However, a longer time spent in port does **NOT** necessarily mean port is less efficient, as owners of ships may choose to have them stay longer in a port to purchase goods.

- Port with faster turnaround can accommodate a larger number of port calls with the same number of berths.

- Such a port is also more attractive to shippers and carriers so the number of port calls will be higher compared to a competing port that has a lower turnaround time.

ESA

Regional Hubs
Eastern & Southern Africa Ports

- There are no global hubs in the ESA region.

- A regional hub is smaller in scale and acts primarily as a transshipment hub to other ports in the region.

- Feeder ports are the ports that are not connected to the main trade routes and are primarily "feedered," or served, by the main shipping lines, via the regional hub ports.

- Regional ports, small or large, are those that have a specific focus on the port's direct hinterland, which determines the size of the port.

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Thank you for your attention

Asante sana!

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