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The blue economy in North Africa:
the efficiency of maritime transport in facilitating international trade in the digital age

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Blue Economy in North Africa

Sectorial Analysis for Maritime Transport

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The current report is a brief of an extended research project conducted by the Sub-Regional Office for North Africa (SRO-NA) of the Economic Commission for Africa (ECA) on the Blue Economy within the sub regional context. It addresses sectoral analysis of Maritime Transport.

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L'Blue Economy in North Africa :
Sectorial Analysis for Maritime Transport

- The Blue Economy (BE): is an emerging concept that integrates the economic exploitation of water resources with an advocated strategy to protect their health.
- The African continent and North Africa (NA) sub-region are enriched with aquatic natural resources which multiply the BE's potential towards stimulating growth and development.
- The UN 2030 Agenda for Sustainable Development and African Union-Agenda 2063 "The Africa We Want" form the guiding principles for the development of sustainable BE policies in Africa.
- Across the NA sub- region, BE is partially conceived and understood, while in application the concept is far from being developed.
- Maritime Transport holds remarkable potential in driving blue sustainable growth in the NA sub- region. This is stimulated from the sub-region's strategic location and the remarkable economic contribution of maritime transport sector to the national and regional economies and represents remarkable potential for promoting blue growth and employment on a sustainable basis.

I. Concept of Blue Economy

A. Background

The Blue Economy (BE) has been an increasingly invoked concept that integrates the economic exploitation of water resources i.e. oceans, seas, rivers, lakes and other water bodies with an advocated strategy to protect their health. More than 80% of Mother Earth is covered by water bodies, which are considered amongst the most important life resource. Water sources are entitled for half the global production of oxygen as well as the largest carbon sink that absorbs nearly quarter of the carbon dioxide emitted. This reduces global warming where 90% of the additional heat realized due to greenhouse effect is plunged.

Economically, oceans[1] are considered a remarkable source for both wealth creation and jobs provision (van der Nest 2017). For instance, 80% of global trade take place via maritime transport, while 32% of hydrocarbons are extracted from the oceans. Additionally, almost 200 countries and overseas territories benefit from touristic activities that are driven by the oceans (Patil et al. 2016). Within the African continent, 84% of African nations are coastal states, while in the NA sub-region, none of the member states are landlocked. In terms of African trade, 90% of imports and exports take place via the sea, which is a 10% higher proximity than the world. Both, the continent and the NA sub-region are enriched with various economic activities taking place along its coasts, all that multiply the importance of the water bodies and the importance of adhering to BE principles.

1 According to (Park 2014) "ocean, marine and maritime" are synonyms which have been used interchangeably across different countries.

The BE has recently emerged after the UN's conference for Sustainable Development (Rio+20) in 2012. The conference's discussions oscillated around two thematic areas, the refinement of the Institutional Framework for Sustainable Development as well as the development of "green economy" a concept that was founded in 1989 (Smith-Godfrey 2016). The emergence of the BE upon Rio+20 attempted to marry the notion of ocean-based development with environmental stewardship and protection. It aimed to extend the green economy principles towards application on marine and ocean economies as the green economy was contested by costal nations in terms of applicability and relevance.

B. Definition & Components

The BE, and sustainable ocean economy are synonyms where they both account for the environmental risks, ecological damages that could be mitigated or reduced from economic activities realized in the ocean economy (Pauli and Corbis 2015). Thus, the core difference between them and the ocean economy is the attribute of sustainability upon any economic activity conducted that does not only minimize any harm introduced to the ocean but also focuses on restoring the ocean's health. Therefore, the BE has been defined as the "sustainable ocean economy that emerges when economic activity is in balance with the long-term capacity of ocean ecosystems to support this activity and remain resilient and healthy" (Pauli and Corbis 2015).

Components : The BE's umbrella incorporates a range of the productive sectors, among the main widespread across the African continent are fisheries,

aquaculture, tourism, transport, shipbuilding, energy, bioprospecting, and underwater mining and related activities (UNECA 2016). Through the BE lens, ocean-based activities operate in clusters which are looked at as an economic system or an economy rather than fragmented collection of individual sectors (OECD 2016). The BE ecosystem also accounts for several services whose markets seize up to exist such as carbon sequestration, coastal protection, waste disposal as well as biodiversity. It moves beyond with an attempt to qualify its products and services on the basis of ensuring social, economic benefits for current and future generations (UNDP 2018).

Blue Growth
A concept introduced on same principles of the "green growth".
It aims to realize economic growth for ocean activities in terms of sustainable and environmental terms. (Pauli and Corbis 2015).

C. The BE's Economic Value

The BE is founded on incorporating ocean values and services into economic decision-making process. Thus, breaking the mold of "brown developmental model" that relied on free resource extraction and waste disposal while having the environmental costs externalized from economic calculations (UNCSD 2012). It attempts to create a glossary for all ocean-based industries and economic activities within an ecosystem approach. The BE considers the economic benefit of the industry as well as its potential effects, to generate blue growth.

If the ocean is a country, it would be the seventh largest economy worldwide (European Union, 2017).

Estimates for the contribution of the ocean economy to the global world economy are calculated, however due to the lack of well-established marine database globally, a wide range of estimates exist. According to the European Union (European Union 2017), the ocean output is $1.3 trillion and forecasted to double by 2030. Meanwhile, the economic value of ocean goods and services by the world ocean council were estimated $6 to 21 trillion (Patil et al. 2016).

D. Agenda 2030: International Guiding Principles

Living with the Ocean and from the Ocean in a Sustainable relationship: formulates the core of the BE. In 2015, the UN's approval of Agenda 2030 encompassing 17 Sustainable Development Goals (SDGs) with a standalone goal SDG 14 "life under water" presents an acknowledgement and a declaration to the importance of incorporating the ocean's health among the pressing sustainability challenges. Initial discussions around the BE were always associated with SDG 14 however, UNECA has developed a study demonstrating that the BE is interlinked with all SDGs. This is because aquatic and marine resources play a remarkable role in ending poverty via supporting an array of economic sectors that provide livelihoods and employment opportunities. In fact, the BE principles are highly integrated with the 17 SDGs through the UN Agenda 2030(UNECA 2016).

"*It can be expressed that the Agenda 2030 for* ***Sustainable Development*** *forms the corner stone for the development of sustainable BE policies, in fact it's the guiding manifesto*"

E. Africa's Strategic Direction for BE

The BE has the potential to become Africa's "engine" for development. It aspires to trigger Africa's structural transformation, promote integrated development and improved regional cooperation as well as equitable distribution of wealth. In 2014, at the 22nd Ordinary Session of the Assembly of Heads of State and Governments of the African Union, Seychelle's Deputy President Danny Faure stated, "The Blue Economy is Africa's Future". Meanwhile, the 2050 Africa's Integrated Maritime Strategy cited the BE as the "New Frontier of African Renaissance"((AUC) and African Union Commission 2012)

Agenda 2063 has stated the BE among the priority areas. Accordingly, the BE has been unanimously declared as a major contributor to continental transformation and growth (African Union 2015). It has been listed as a cardinal component at Agenda 2063's former aspiration "prosperous Africa".

The BE's in Africa is guided by both UN Agenda 2030 and African Union Agenda 2063 "The Africa We Want" aspirations which establish the guiding premises for national and regional policy formulation.

F. State of Awareness of BE in North Africa

The BE literature is at the stage of infancy; however, it is growing; nonetheless with respect to North Africa (NA)[2] literature on the BE is nonexistent. NA ocean economy studies were tackled on a sectorial basis for instance; tourism, energy...etc. or for a selected country or a panel data-set. This has limited a comprehensive picture for all the challenges and opportunities where there is room for assessing the concurrent status of the BE with the NA sub-regional outlook. The current research

2 North Africa (NA) is the collective term for grouping seven-member States that include Algeria, Egypt, Libya, Mauritania, Morocco, Sudan and Tunisia. Covered by Sub- Regional Office for North Africa (UNECA- SRO- NA).

aims to fill gaps in literature with respect to the NA sub-region particularly studying two sectors: tourism and maritime transport.

G. Some of NA's BE Resources

The NA sub-region is enriched with BE resources that endure ocean-based activities on its shore along its coastline or within its Exclusive Economic Zone (EEZ).

Coastline Length: None of NA member States are landlocked, all have a coastline. The economic importance of the coastline is multiplied by its length and activities taking place along it thus stimulating economic growth. Algeria, Tunisia, Libya coastal lines are extended solely on the Mediterranean Sea. Egypt's and Sudan's west borders are lined with the Red Sea. The Mediterranean Sea also spans Egypt's and Morocco's North coast. Morocco's west coast is lined with Atlantic Ocean making Morocco the longest coastline in NA followed by Egypt. The extended NA coastal length stress the important role of the BE and the great potential in generating blue growth by applying its principles.

BThe BE in North Africa is NOVEL! Across the NA sub-region, The BE is partially conceived and understood, while in application of the concept is far from being developed. Although the NA region has a wide range of ocean-based industries yet there is no published data on either the economic or social values nor on the potential of oceans. This has significantly hindered measuring the BE's contribution to both national and sub-regional economies.

Human Resources : Coastal areas have the tendency to attract large proportion of the population due to their resource abundancy particularly food, and other subsistence resources, accessibility to marine trade and transport, recreational activities and connectivity between sea and land. On a global level, coastal population represent 40% of the global population while their rates of growth and urbanization are higher compared to hinterland due to internal labour migration stimulated from the economic activity (UNECA et al. 2017). The NA coastal population is estimated at a total of 79 million (Ocean Health Index, 2017).

The NA coastline length is 25%, 11.6 km of the total African 30.5km where none of NA member states is landlocked.

Table 1 : Coastal Population in NA 2015

	Coastal Population (millions)	Total Population (millions)	%of Coastal Population
Algeria	19.8	41.3	48%
Egypt	25.2	97.6	26%
Libya	3.1	6.4	49%
Mauritania	1.5	4.4	35%
Morocco	18.8	35.7	53%
Sudan	1.1	40.5	3%
Tunisia	9.2	11.5	80%
Total NA	78.73	237.5	33%

Source *(OHI, 2017)*

Exclusive Economic Zone (EEZ) : Coastal nation assumes jurisdiction over the exploration and exploitation of marine resources in its adjacent section of the continental shelf according to the Third United Nations Conference on the Law of Sea (UNCLOS) in 1982. The EEZ takes to a band extending from the coast, or in the federal system from the seaward boundaries of the constituent states (3-12 nautical miles) up to 200 miles from the shore (United Nations, 1997). It plays a remarkable role in ocean governance, marine spatial planning and ocean -based industries.

NA's estimated coastal population is 33% of its total population. It deviates by 7% from the global average and 22% from the Mediterranean average which are 40% and 55% successively.

The NA sea area shares less than 1% of total world's ocean area, 13% of the continental EEZ (13 million km2).

Blue Growth in North Africa
Since Rio+20 the blue economy has gained momentum across the globe marking the need to stimulate «blue growth» particularly for island nations and developing countries with significant coastlines and maritime areas. The BE economy seeks to use sustainably untapped marine resources and seaways within the country›s EEZ toward economic diversification, trade specialization and connectivity (UNCTAD, All News, 2014).
The NA region is rich in its coastal resources and BE industries with a remarkable potential to capitalize on its resources towards economic growth. Among the main sectors are Maritime transport and Tourism given their strategic importance and economic significance in the NA region. Additionally, both sectors have been defined in literature under one umbrella notably Commerce and trade around the ocean where transport and trade as well as tourism and recreation are its two sub-segments. This is because both sectors are interlinked. Also, they are reported in national accounts under the services category.

II. Maritime Transport in North Africa

A. Strategic Importance of NA Maritime

North Africa is boarded by the Mediterranean Sea, which is an inland sea surrounded by Asia, Europe and Africa. In the west, the sea is connected with the Atlantic Ocean via the Strait of Gibraltar (Morocco) while in the east, it is linked to the Red Sea and the Indian Ocean by the Suez Canal (Egypt), and the Black sea by the Dardanelles and the sea of Marmara" which increases the importance and strategic position of the sub-region (Kizielewicz, 2013).

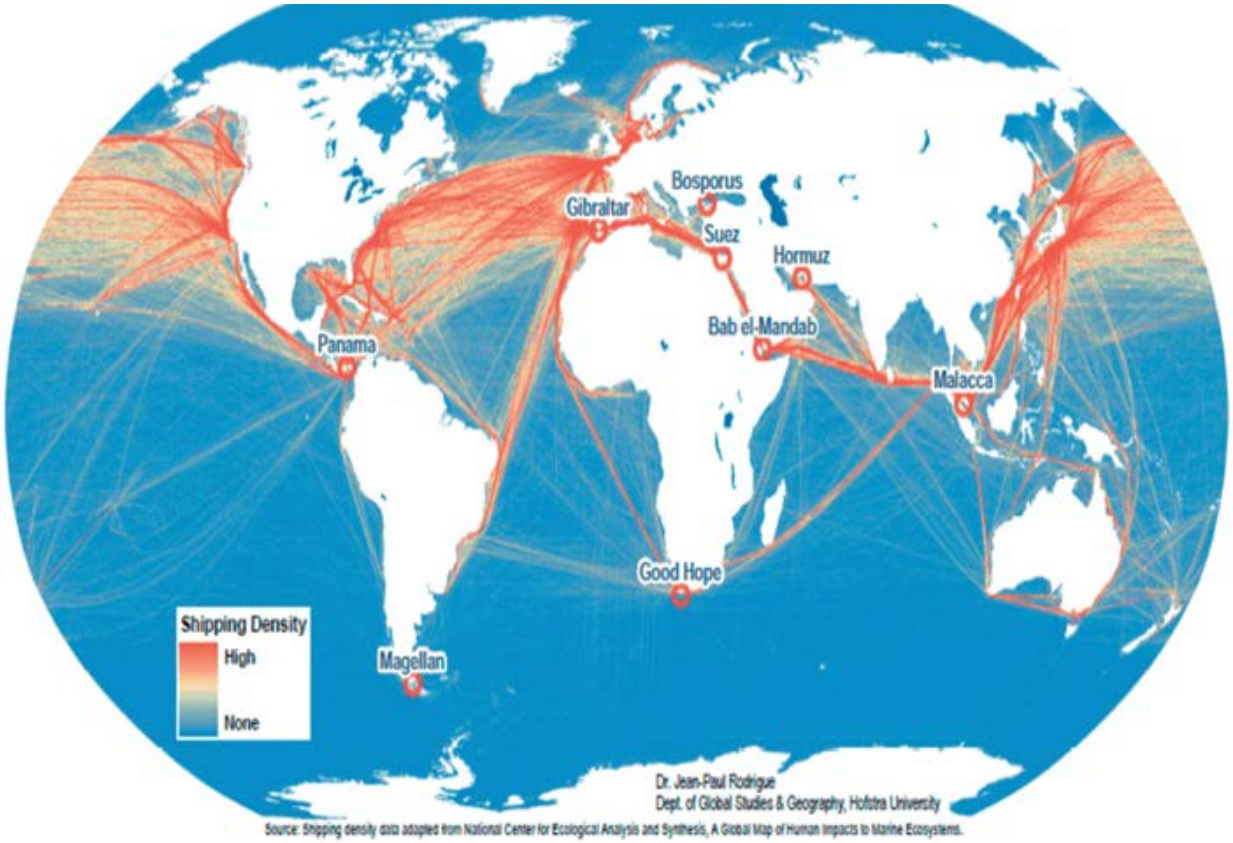
Suez Canal – Strait of Gibraltar Route : The three main chokepoints that shape the strategic importance of the NA sub- region are: Strait of Bab-El Mandeb, the Suez Canal as well as the Strait of Gibraltar. Through the Suez Canal –Gibraltar Strait route the world's two sides (east and west) were connected through a route that halved the distance and transport costs compared to the Cape Town Route, thus increasing the strategic importance of NA. Despite the availability of alternative routes which is not the case for all destinations, longer transit periods shall be realized, traffic shall be concentrated and the security aspect of exposition of oil tankers to maritime piracy might not be mitigated (EIA Beta 2017). Today, more than 8% of the global sea borne trade passes through the Suez Canal. This has induced a ripple effect on the countries bordering both seas via increasing the importance of the maritime transit industry for these countries. Indeed, this has presented an economic opportunity for growth and development, jobs and employment. Figure 1: Global Maritime Routes

Trade has been recognized as the engine for inclusive and sustainable development and growth. Thus, by inference Maritime Transport is its motors. NA's strategic location has promoted transit trade industry across the region holding one of the busiest routes between Suez Canal and Strait of Gibraltar.

B. Trade and Development

Trade and development : Trade is a key factor in economic development. Through the prudent usage of trade, not only do the trading partners benefit but the whole value chain eco-system benefits, which maximizes nations wealth. The sector's strategic importance has been stressed in the 2030's Agenda for Sustainable Development as well as in the Addis Ababa's Action Agenda. In fact, "trade has been recognized as the engine for inclusive sustainable development and growth"! (UNCTAD 2016). Thus, by inference "maritime transport formulates the motors for its actualization".

Figure 1: Global Maritime Routes

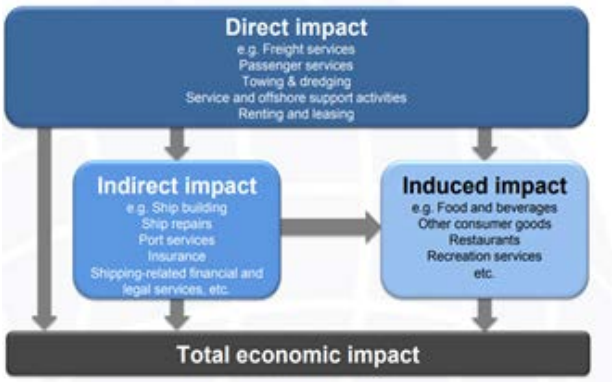


NA's member states have signed several trade agreements to maximize their international trade. and its yields. However, on a sub-regional level, North Africa's regional integration process is limited and falls short of the ambitions expressed through the different treaties and agreements. In fact, it can also be considered relatively delayed, compared with the developments in the rest of the continent. On a continental level, 2018 witnessed the signing of the African Continental Free Trade Area Agreement (AfCFTA) by 44 African nations that aim to cut 90% of tariffs on goods to increase the intra-African trade. This is expected to stimulate the intra-trade among the African nations that composes 15% of the total continental trade. The NA region holds a comparative advantage due to its relatively developed economies that can stimulate trade in the region, Thus, through strengthening its exports, intra-maritime transport services shall also be encouraged being fundamental for the trade facilitation.

C. Economic Contribution of Maritime Transport Services

Maritime Transport economic impact can be measured through vast indicators. Due to the lack of well-established maritime database we will rely on our analysis on selective indicators for the sea transport services that is a sub-category of transport services exported.

Figure 2: Economic Impact of Maritime &Shipping Industries



Source:(Goodwin 2016)

Export in Services : due to the unfavorable economic and political conditions the region has faced, trade exports in most of NA countries have declined. This has automatically induced a decline in 2016's services' exports by 22% compared to 2010.

In 2016, the total sub-regional value of services exported was $37.6 billion. Its share of the total continental exported services declined from 51% in 2010 to 39% in 2016 while the continental services exported grew by 0.6% in the same period to 95.9 billion in 2016

Transport Export in Services : NA's transport services exports in 2016 are 27% of total services exported on average. In value, this translates to $12.7 billion of total $37.6 billion.

The NA transport service exports are 48% of total African transport services exported.

Egypt has the highest contribution of transport services exports in terms of both values and share of service exported. $5 billion navigate through the Suez Canal which constitutes 61% of the Egyptian $8.1 billion transport services exported in 2016. Morocco stands in the second position among NA member States. Thanks to its geographical location and diversified exporting economy. Morocco's transport service value is $2.6 billion and that is a share of 16.8% of total Moroccan services exported. Tunisia is third in terms of value with $954 million followed by Algeria with $672 million where transport services make up 29% and 20% of total trade services exported, respectively. This could be attributed heavily to the oil exports in Algeria as well as the dominance of the tourism industry in Tunisia. Sudan's efforts towards the promotion of its transit trade has multiplied its transport exports to the point that the share is 17% of its total trade services exported. Although Libya has a relatively high share of 39% transport exports to its total trade services exported, it has been heavily impeded by the political instability. Mauritania and Libya stand on the same grounds in terms of value of transport exported with vast room to improve infrastructure and services provided.

The North African sea transport service exports are estimated to be $3.6 bn in 2016 formulating 57% of total African sea transport services exported.

Table 2 :Transport Export in Services

YEAR	Value (USD) Million	% of Total Trade Services
Algeria	672	20
Egypt	8,191	60
Libya	33	39
Mauritania	33	12
Morocco	2,580	17
Sudan	260	17
Tunisia	954	29
Total NA	12,723	34
Africa	26,160	27

Source :*(UNCTAD Stat, 2018)*

Sea Transport : is composed of passenger, freight

and other forms of transport. According to UNCTAD 2018, the total sub-regional sea transport exports for NA member States is $3.6 billion for 2016 i.e. 28% of total transport services exported and 57% of total of the $6.32 billion of Africa's total sea transport exports (UNCTAD Stat, 2018). Nonetheless, this number is under-estimated, due to the absence of sea transport data for Libya and Sudan, and under estimation of the Egyptian sea transport services at a value $2.3 billion for year 2016 when just the Suez Canal receipts are $5 billion. Meanwhile, this could be a good indication of the remarkability of the sector on a regional level. Assessment for the sector's importance will account for other indicators such as container throughput and merchant fleet as well as the Logistics Performance Indicator (LPI).

D Environmental Challenges Due to Maritime Transport

Blue Economy does not treat ocean assets at face value, it accounts for the assets' value and introduces natural accounting systems to incorporate ocean value into national accounts.

Although, maritime transport has been entitled as the most "efficient" mode of transport with the least impact on environment and limited carbon dioxide emissions, environmental challenges still take place. This is due to shipping, port operations and port-related industries where environmental externalities such as greenhouse gases, carbon monoxide, dioxide and nitrogen oxide emission, ocean noise, toxic and oil spillage, pathogens, habitat destruction due to establishments of ports that impact coral reefs are realized. In addition, bio-invasion occurs because of inward movement of non-indigenous species as a result of shipping transport.

Mainstreaming of climate change besides environmental considerations that encompasses environmentally sustainable infrastructure (e.g., green ports) into existing and new Blue Economy continental, sub regional, and national plans, policies, and relevant legislation is paramount for sustainability of African economies (AFDB and UNECA, 2017). The sub-region stands on a relatively good ground in terms of green economy measures, however maritime transport is among the sectors that hold remarkable room for improvement.

Developing a BE Strategy is essential to ensure the maximization of ocean benefits in alignment with the BE principles endowed in the SDGs.

BE is low-carbon, efficient, and clean. Its growth is driven by investments that reduce carbon emissions and pollution, enhance energy efficiency, harness the power of natural capital—such as the oceans—and halt the loss of biodiversity and the benefits that ecosystems provide (World Bank and United Nations Department of Economic and Social Affairs 2017). The BE understands the ocean's contribution to wealth creation, the sustainability of that contribution as well as the sources of all sustainability threats (Colgan 2016).

Maritime Transport and Blue Economy

The blue economy holds significant potential to contribute to higher and faster GDP growth in Africa. Through marine and maritime services provision as well as transport blue growth shall be realized which serves as a foundation for sustainable development in Africa. Accounting for the existing large share of trade through maritime transportation (>90 percent) across the African continent of which NA's share is nearly 50% of the total continental value of transport and sea transport services are exported. This presents a unique opportunity to put in place relevant policies and strategies to maximize benefits from this sector towards blue growth on a sub-regional and continental

III. Roadmap Towards Transitioning to BE in NA

The NA region has proved to be rich in BE resources besides it strategic geographical location that multiplies the significance of the BE as a "motor" to drive the growth in the sub-region. In fact, transitioning towards the BE shall empower local and regional development through harnessing the array of its aquatic wealth. Through the transpose, the exploitation of BE's economic benefits, capitalization on the widespread BE natural resources, diversification of the economy through the ocean-based industries and expansion of social and the economic benefits shall multiply. Developing a BE strategy is inevitable to exploit this potential.

The Africa's Blue Economy: A Policy Handbook developed by (UNECA, 2016) aims to bridge efforts towards formulating a BE strategy and endorsing it among concurrent national strategies. The following milestones extracted from the Policy Handbook shed the light on the necessary guidelines towards promoting the BE in NA to serve as an engine for diversification, growth and development.

Step 1: Agenda Setting, Awareness and Sensitization :

Status : BE is partially conceived and understood and far from being developed in terms of application. The NA region falls behind in terms of :

- Assessing the potential of aquatic surfaces, the ocean assets as well as the various industries and services taking place.
- Availability of marine database.

Guidelines :

- Communicate a sense of urgency for action.
- Study the BE resources.
- Promote awareness through policy dialogues and awareness raising meetings
- Update existing baseline information on the BE sectors, national, regional and international sources.
- Prepare and disseminate synthesis report.

Step 2 : Formulating the BE Policy in Coordination

Status : Absence of a coordinating body for the BE policy committee.

Guidelines :

- Develop a BE coordinating body to facilitate the policy making process.
- Ensure an integrative strategic framework through which private, public and non-governmental bodies engage in the formulation process.

Step 3 : Building National ownership of the BE policy formulation

It would be fundamental to develop a comprehensive database in order to bring forward BE evidence-based policies and enhance the implementation of BE principles

Status : BE sectors in the NA have been incorporated within national policies in a sectorial basis. Having a BE strategy after further development and comprehension to the various interlinkages among sectors is necessary for capitalizing on the BE resources.

Guidelines : BE sectors develop in integration rather than isolation. This entails coordination among the different member states' bodies ensuring clear allocation of roles and responsibilities. This entails

- Consensus Building
- Communicating the BE policy
- Stakeholder engagement
- Empowerment of key actors
- Building of a BE culture

Step 4 : Sector Identification and Prioritization

Status : NA holds numerous BE sectors, each holds distinct characteristics and regulatory framework it is essential to identify and prioritize sectors in terms of policy design and implementation

Guidelines : it is essential to identify and prioritize sectors in terms of policy design and implementation. Among the recommended sectors in the NA would be maritime transport and tourism. However, mining and aquaculture also hold significant relevance in the region.

Step 5 : Designing the BE policy

Status : the NA sub-region lacks a BE policy on both national and sub-regional level.

Guidelines :

Design a BE policy and framework for implementation and regulation.

This entails

- Address regulatory and reform
- Scenario Building for desired developmental outcomes
- Bring forward political support and buy-in
- Analysis of institutional Capacity and skills gap
- Establish measurable milestones associated with timeliness and requisite actions

Step 6 : Police Implementation

Guidelines :

- Establish institutional roles and functions for implementations
- Develop an action plan
- Resource mobilization

Step 7 : Monitoring and Evaluation

Policy
Guidelines :

- Developing a monitoring and evaluation framework
- Periodic review of the implementation progress

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