

# Maritime Security Conference: The Gulf of Guinea and the Red Sea as a Learning Curve for African Decision Makers

6 September 2024

## The Cape Sea Route as a Critical Maritime Route for Shipping and Data Flows

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Photo by Stefan Els



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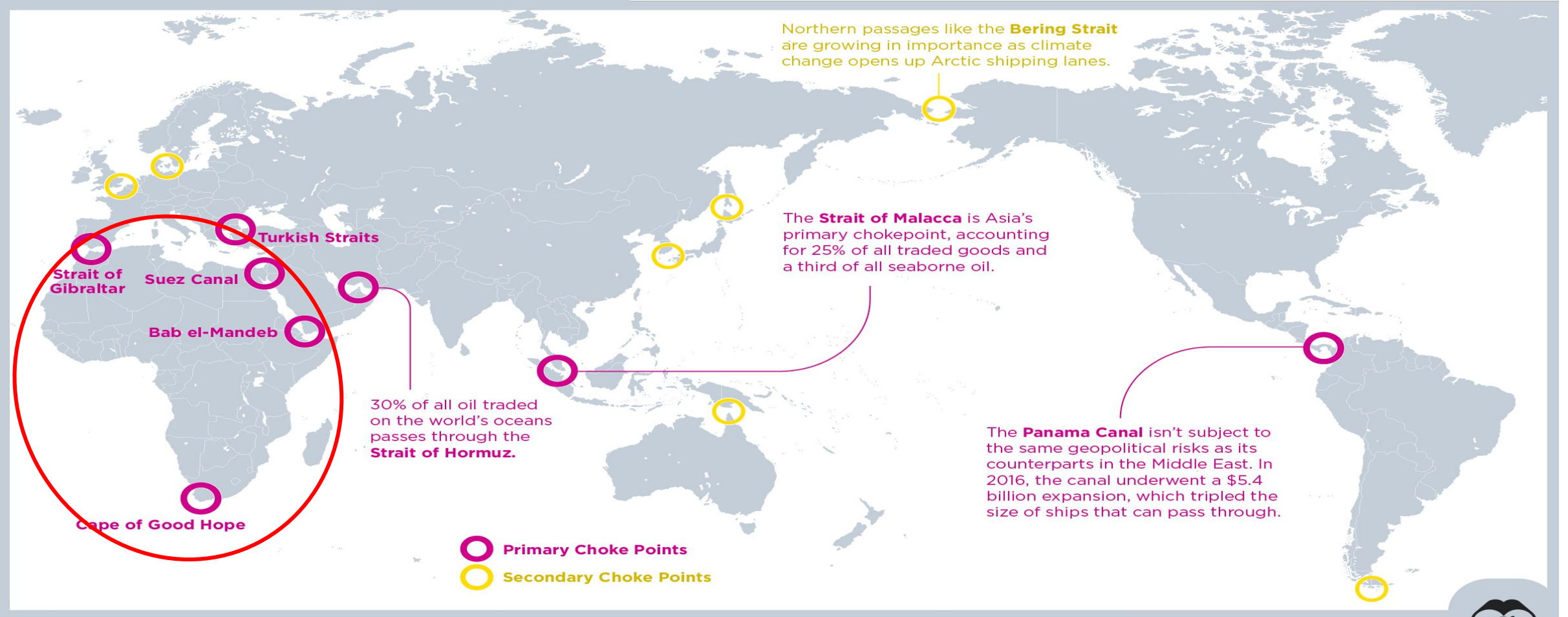
## Scope

- Introduction
- Historical Significance of the Cape Sea Route
- Geostrategic Realities
- The Importance of the Cape Sea Route
- Maritime Data Flows
- Challenges and Opportunities
- Conclusion



# Introduction

## THE WORLD'S KEY MARITIME CHOKES



Source: GIS visualcapitalist.com

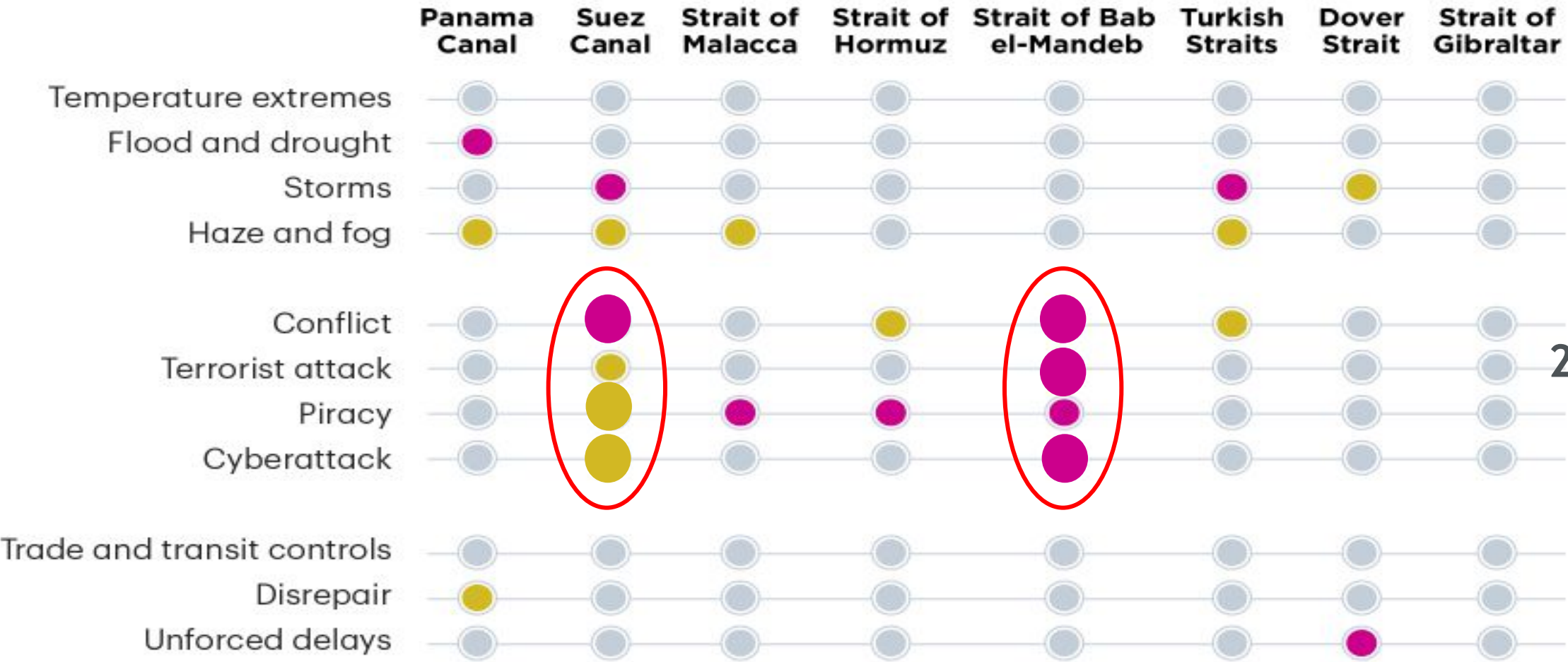


Source: [www.visualcapitalist.com](http://www.visualcapitalist.com)

# Introduction

## RISKS TO GLOBAL TRADE CHOKE POINTS

● High Risk    ● Medium Risk    ● Low Risk



2024

Source:Chatham House 2021

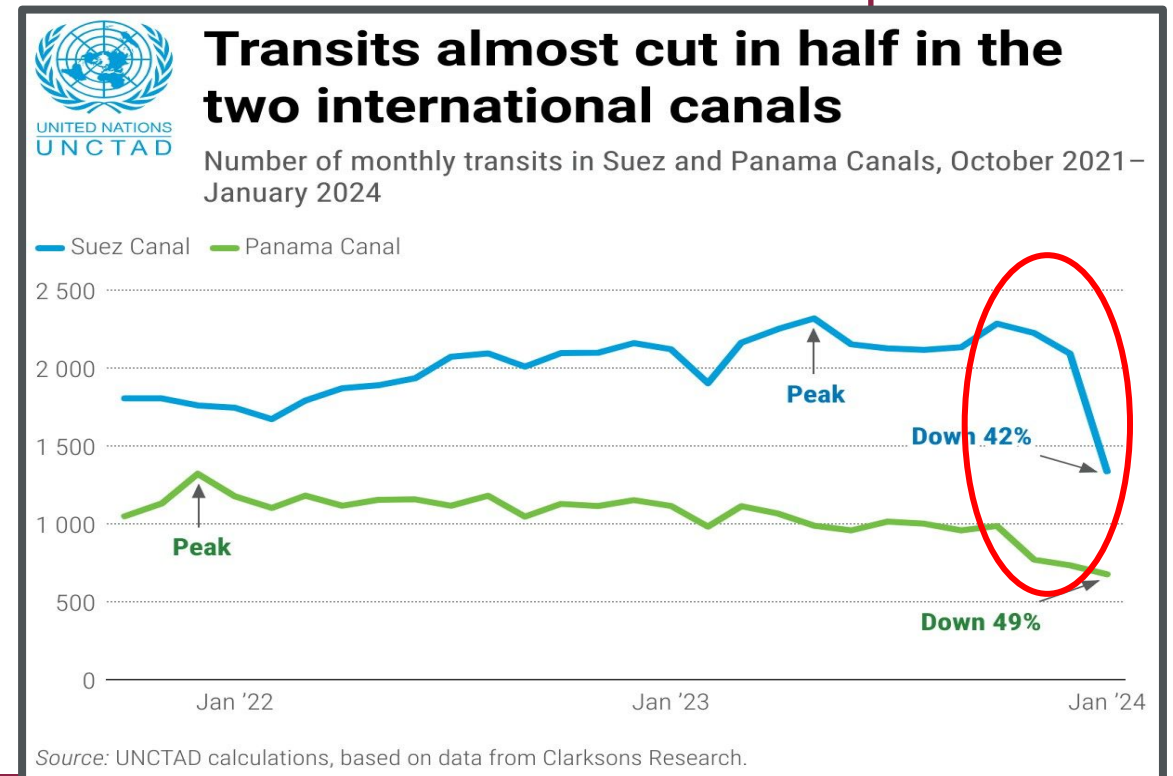
## Choke Point Restriction - Impacts



Source: Researcher 2021

# Introduction

- 90% world trade through the oceans
- Suez Canal
  - 2023 22% global seaborne container trade and 12% global maritime trade
  - Since start 2024 more than 586 container vessels already rerouted
  - Container tonnage down by 82%
  - Car carriers down by 50%
  - Almost no LNG vessels
- Consequences
  - Between 9 and 17 days added transit time
  - Increased security (national and private)
  - Leverage advanced technologies (AI)
  - Expanded infrastructure (storage)
  - Diversify routes (rail/air etc)
- Increased importance of the CSR





# The CSR: Historical Significance

- Colonial Era
  - Navigating Sea Routes
  - Dominance of overland routes
  - Rise of Portuguese/Dutch and British Companies
  - Strategic maritime hub for supply and protection
  - Colonial Conflicts (French/Dutch/British)
- Post Colonial Eras
  - Remained strategically important after WW2
  - Alternative to Suez Canal
  - Economic Development Southern Africa
- Simon's Town Agreement (1 February 1955)
- **Security of the Maritime Domain - SAN**



# The CSR: Geostrategic Realities

1. Russia-Ukraine
2. Israel-Gaza
3. Red Sea / Gulf of Aden
4. Horn of Africa
5. Mozambique
6. Panama Canal





**Target**

- commercial ship
- Israel
- military
- unclear

**Event Count**

- 1
- 8
- 15

**Select Month**

15/03/2024 Pacific 01 (Tanker)  
(Shelling/artillery/missile attack)

15/03/2024 Mado (Tanker)  
(Shelling/artillery/missile attack)

15/03/2024 Mado (Tanker)  
(Shelling/artillery/missile attack)

17/03/2024 Mado (Tanker)  
(Shelling/artillery/missile attack)

22/03/2024 Pretty Lady (Carrier)  
(Shelling/artillery/missile attack)

23/03/2024 Huang Pu (Tanker)  
(Shelling/artillery/missile attack)

23/03/2024 Huang Pu (Tanker)  
(Shelling/artillery/missile attack)

06/04/2024 Hope Island (Container)  
(Shelling/artillery/missile attack)

**Include:**

- ☐ Uncorroborated Events
- ☐ Intercepted Attacks
- ☐ Attacks on Israel

**Events: 152 | Attacks: 128 | Showing data for: 19/10/23 - 30/08/24**

**Reset Zoom**

Leaflet | © OpenStreetMap © Mapbox



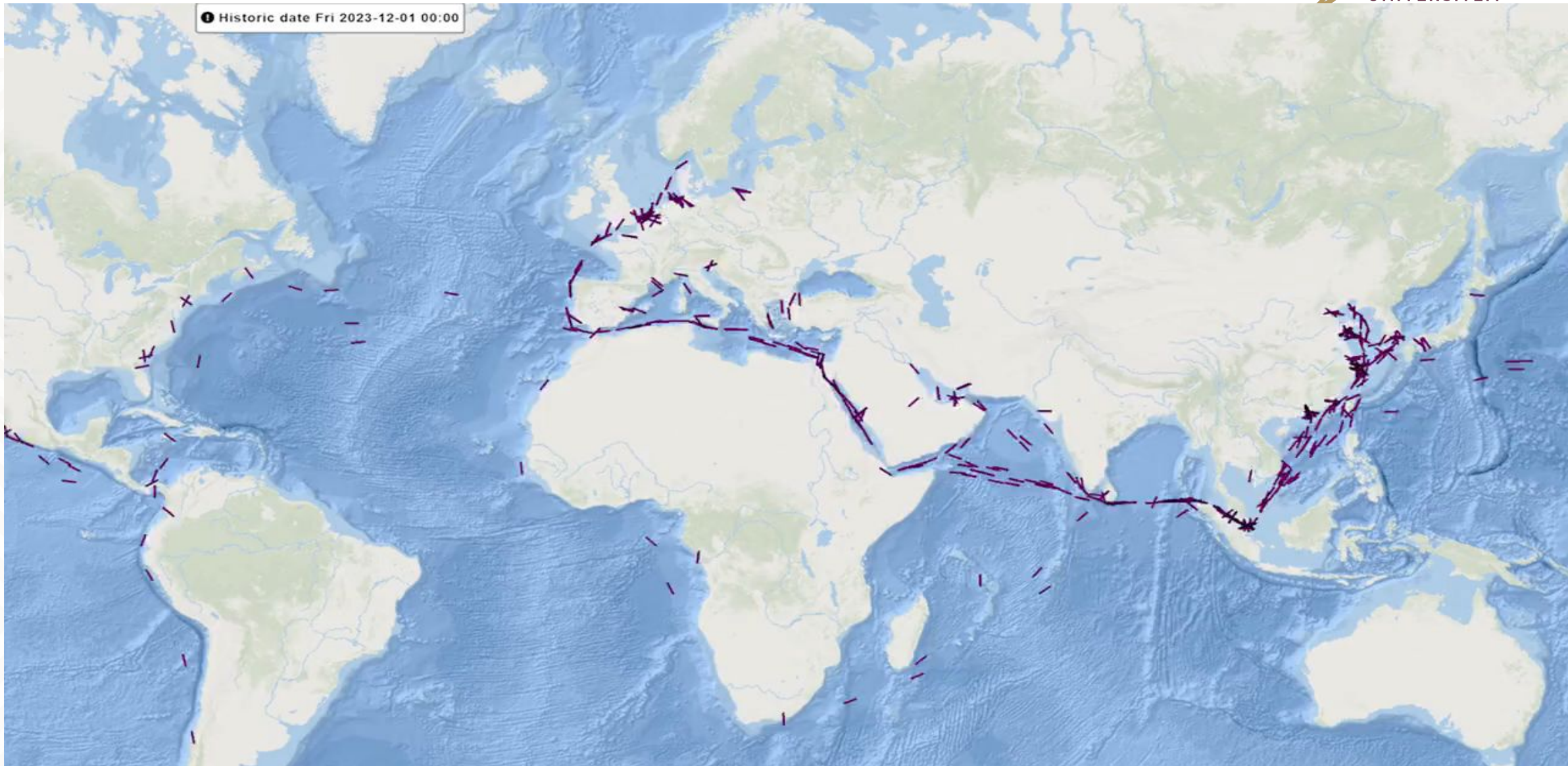
# The Economic Importance of the CSR

- South Africa
  - Strategic location, infrastructure capacity, global connectivity, high trade volume
- Maritime Nation
  - Trade 60% of GDP
  - 98% (vol) and 80% (value) by sea
- Operation Phakisa (2014) (Big, fast results)
  - Enhance economical potential of the oceans
  - R177bn to GDP (potential)
  - Over 1 million jobs
- Sea traffic around CSR rose by 53% since Oct 23
- But.....
  - Ports in SA currently operating at around 65% of capacity (space, equipment)
  - 1% global ship repair market in SA
  - Oil rigs serviced in SA (4/80)
  - Limited ships registered in SA (4/12)



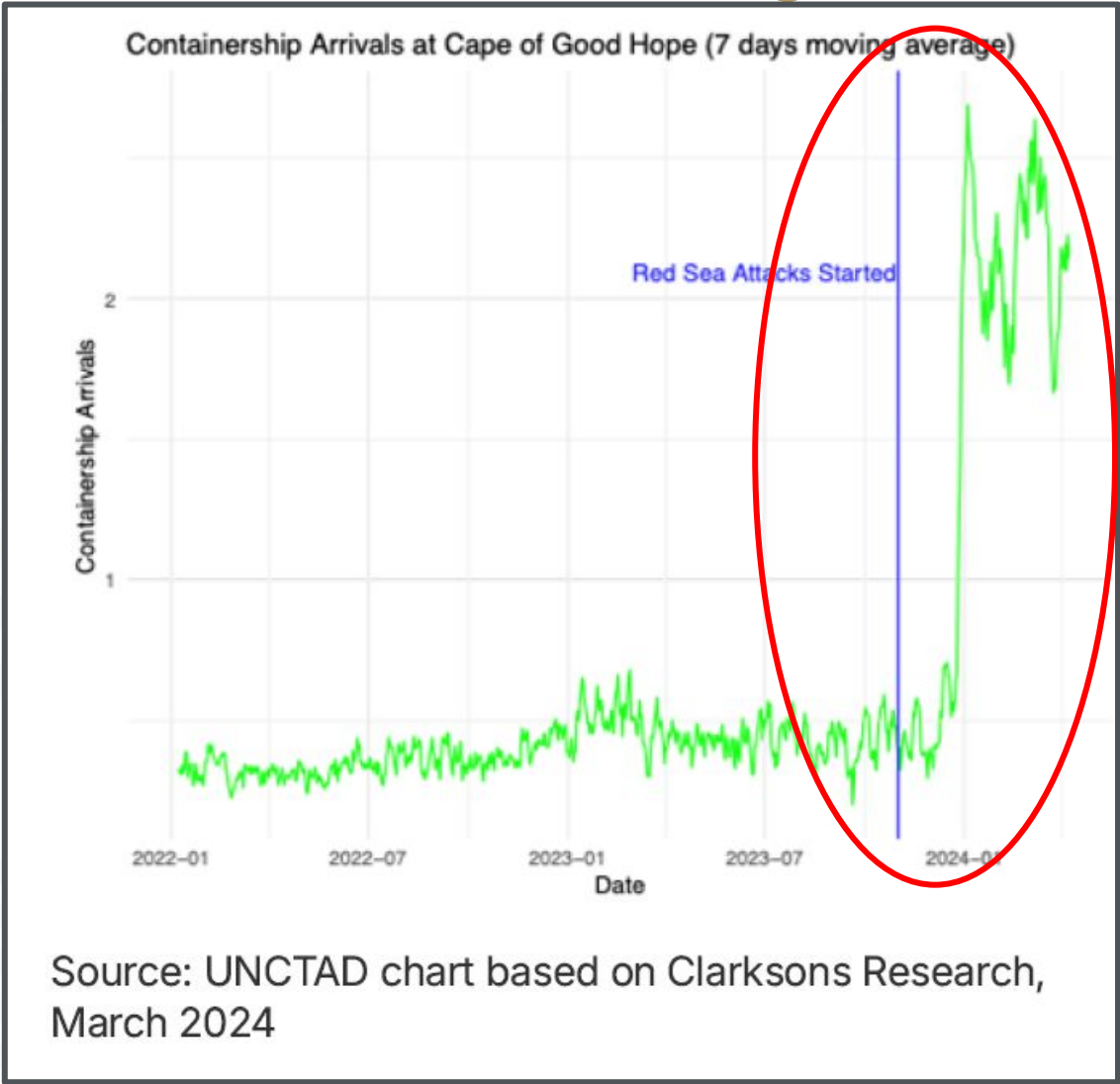
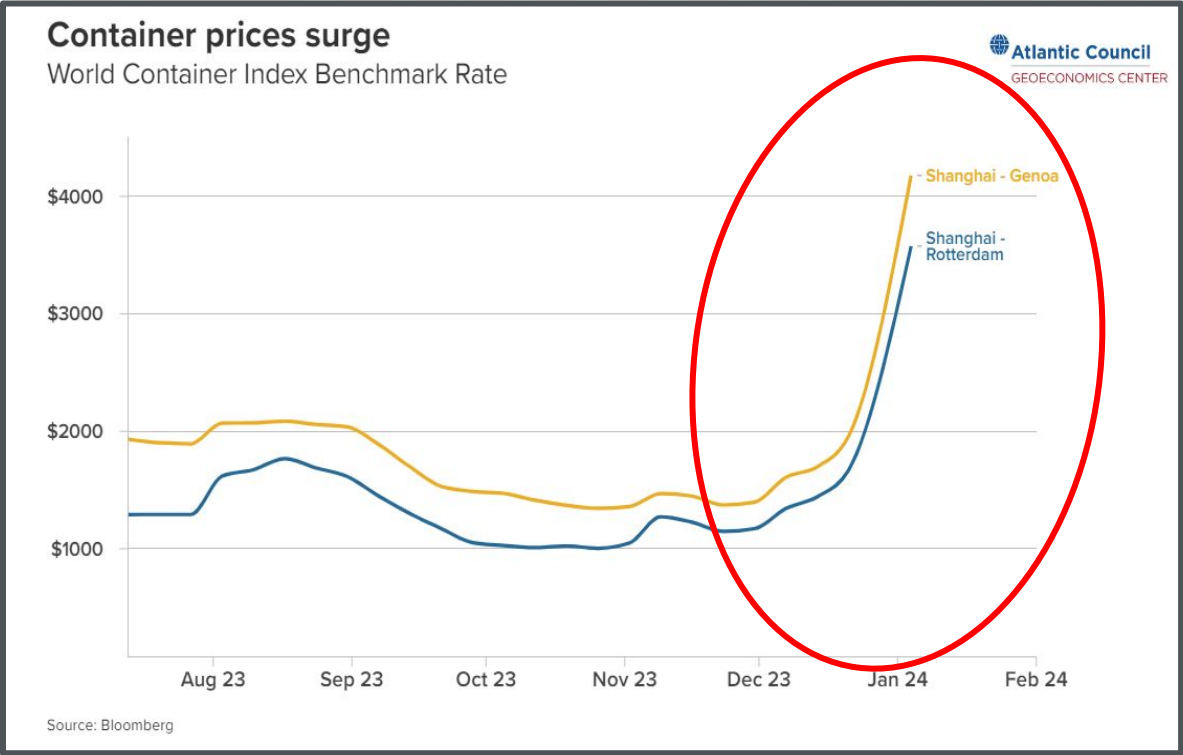


# The CSR: Maritime Container Traffick Flows



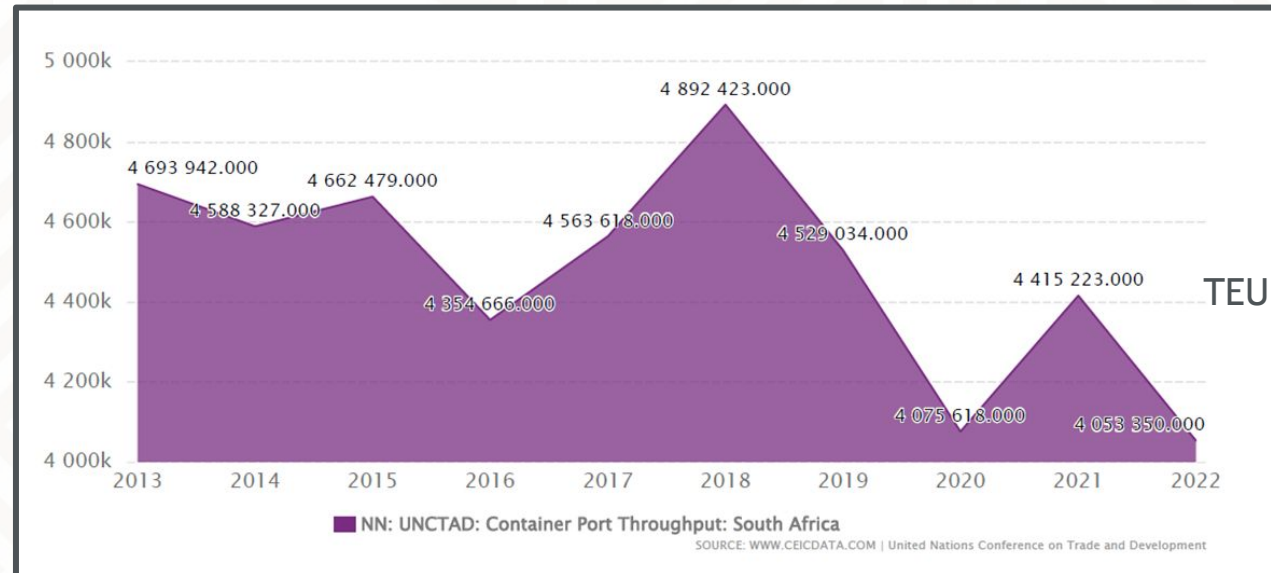


# The Economic Importance of the CSR

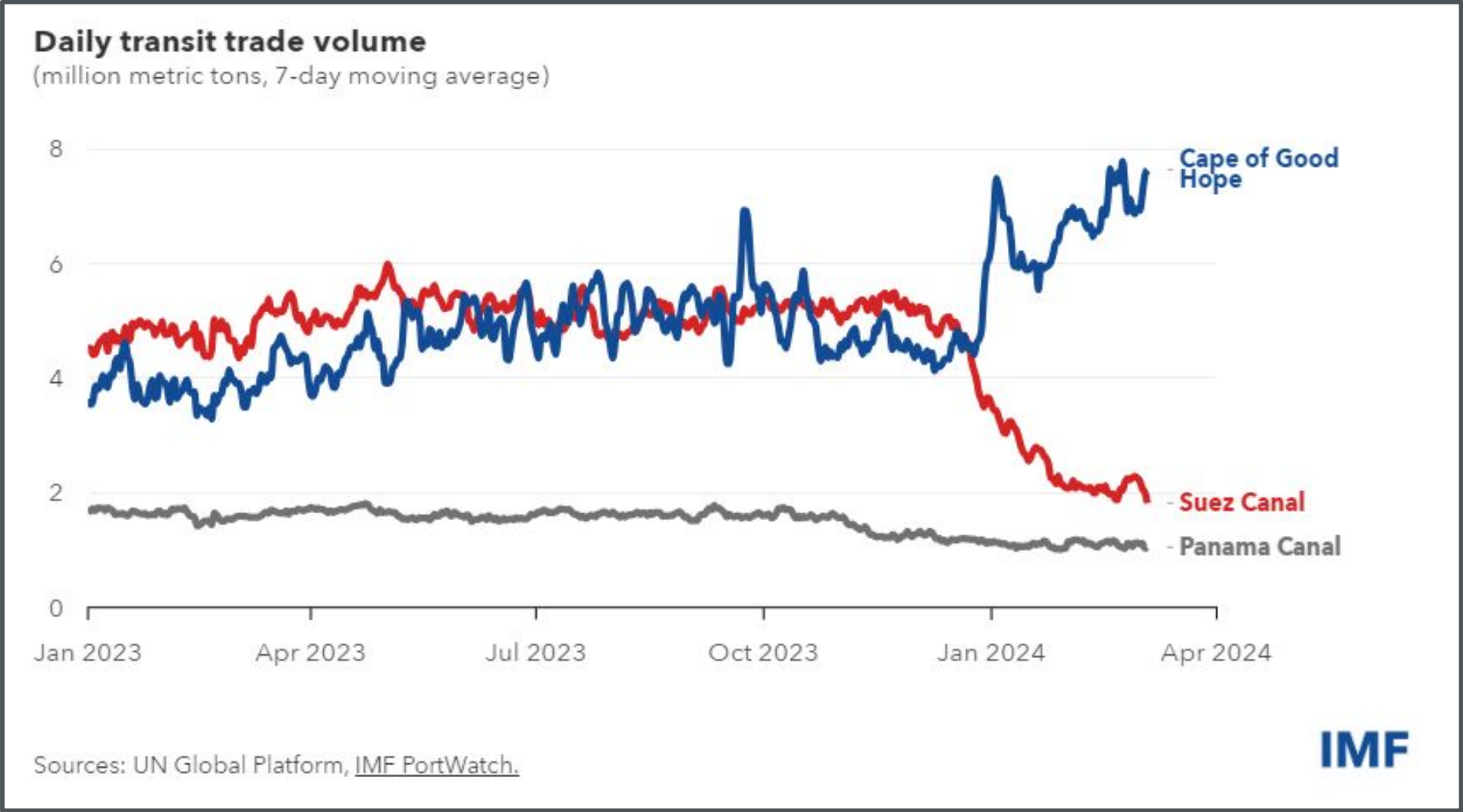


# The Economic Importance of the CSR

Year	Total Cargo	TEUs	Vessel Arrivals
2016	224 260 252	4 355 329	11 199
2018	227 795 114	4 883 329	9 202
2020	222 920 087	4 075 618	9 012
2021	217 522 723	4 382 246	8 453
2022	210 756 418	4 244 510	8 777
2023	210 697 413	4 113 821	8 965



# The CSR: Maritime Transport Flows





# The CSR: Maritime Data Flows

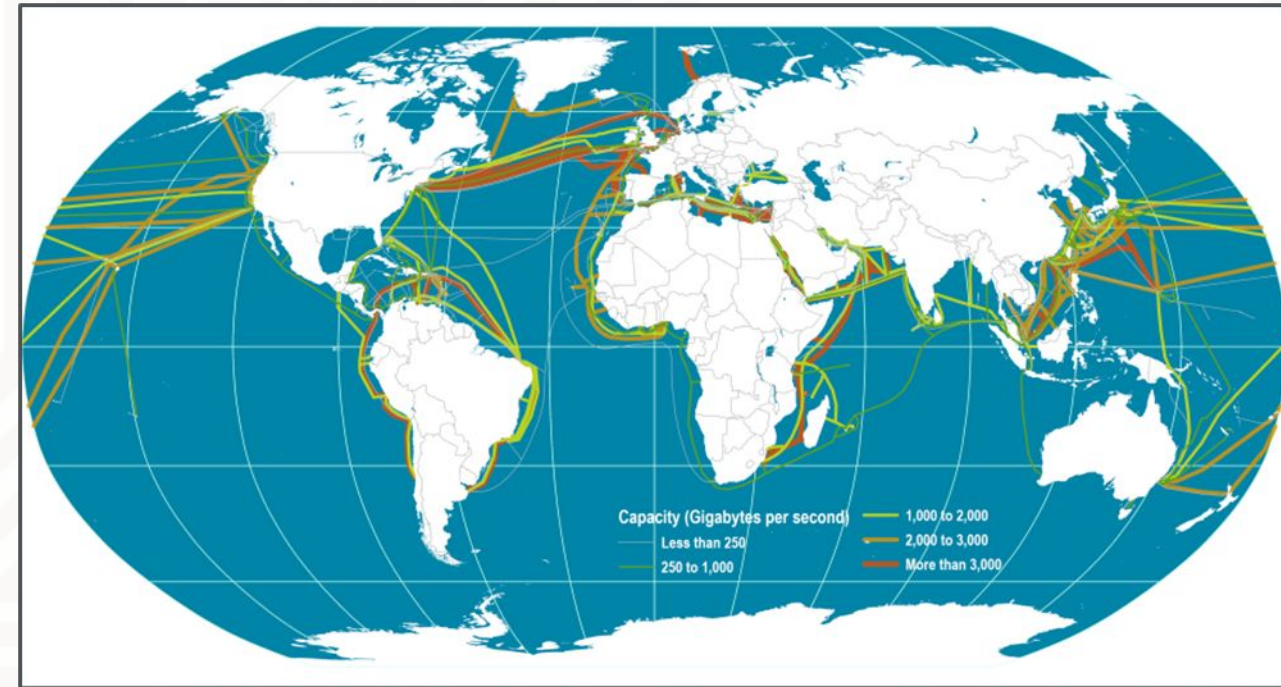
Global dependence

Some statistics

97% global communications

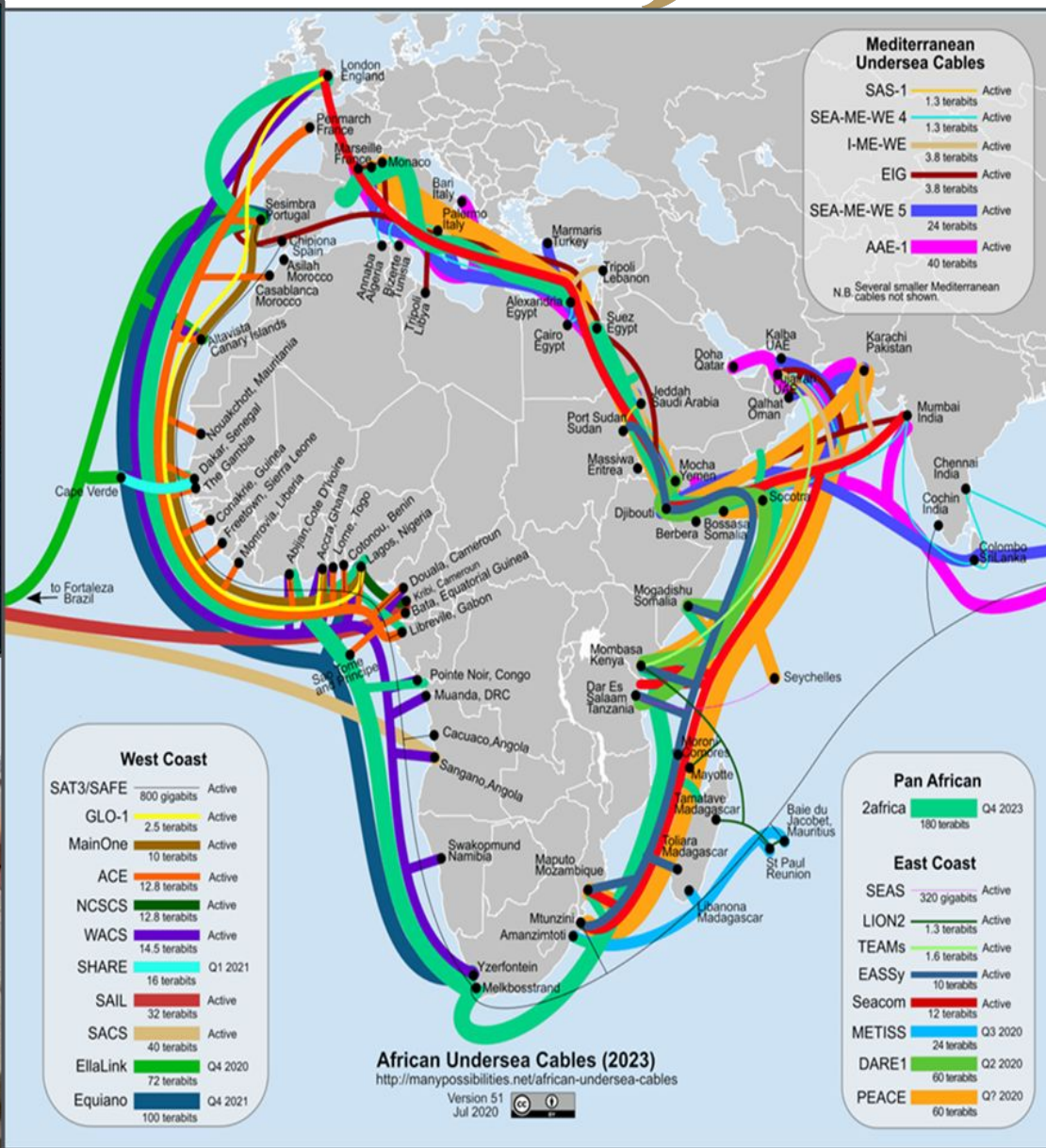
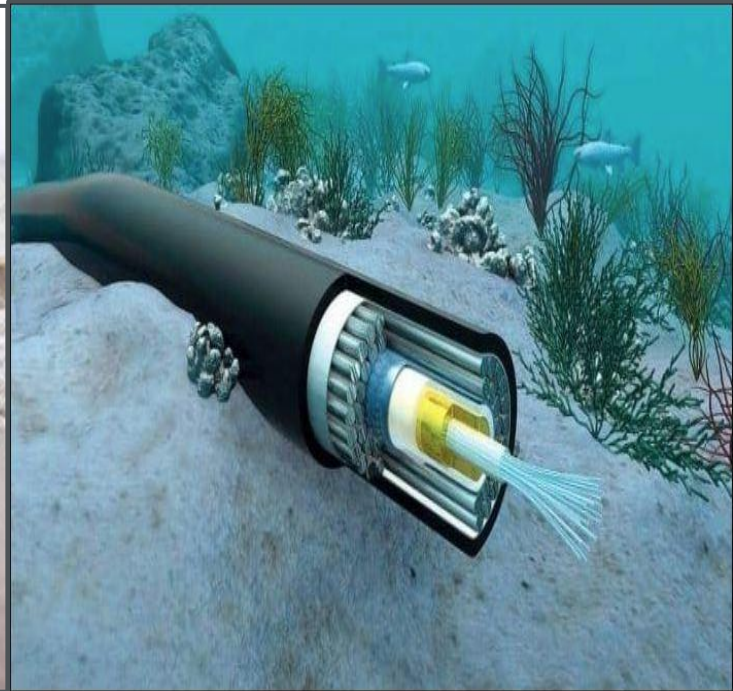
Satellite technology

\$10 trillion financial transfers  
per day





# The CSR: Maritime Data Flows

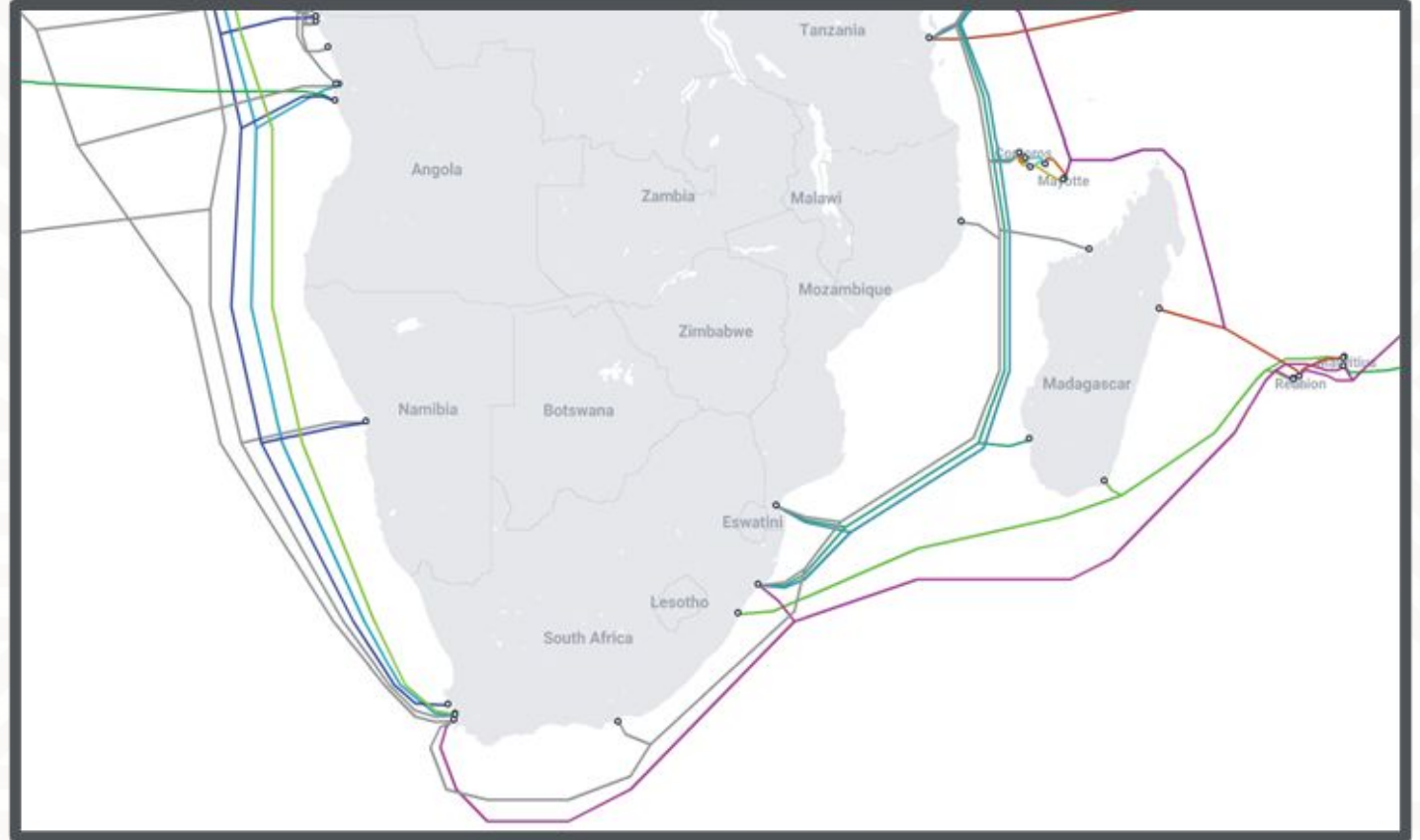




# The CSR: Maritime Data Flows

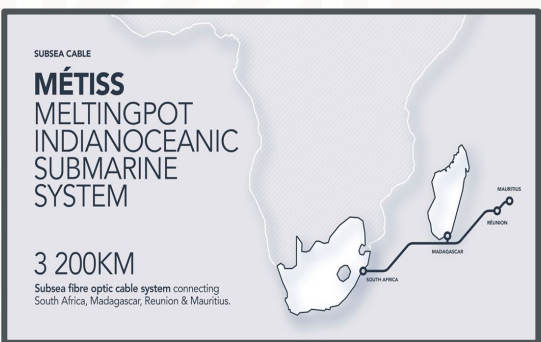
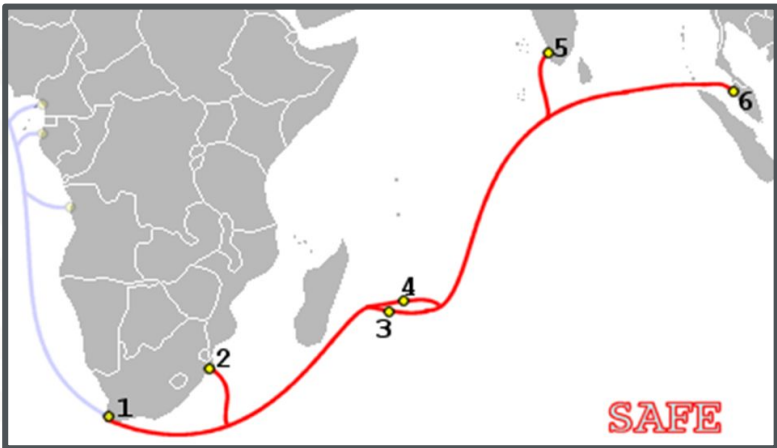
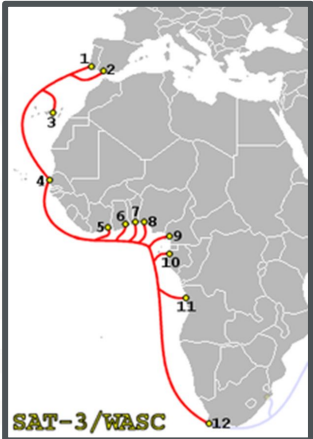
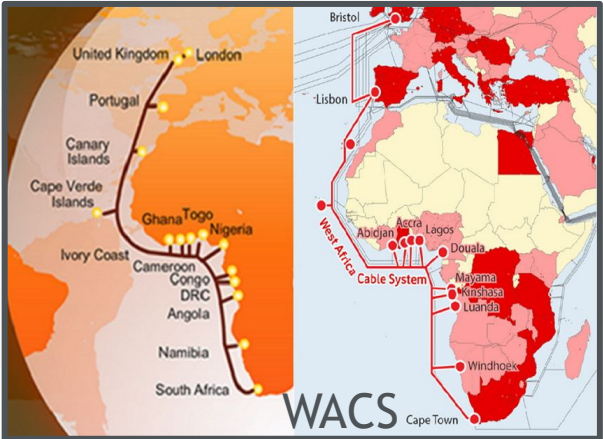
- 9 Subsea Cables in SA

- WACS
- SAT-3/WASC
- SAFE
- SEACOM
- EASSy
- METISS
- Equiano
- 2Africa
- ACE

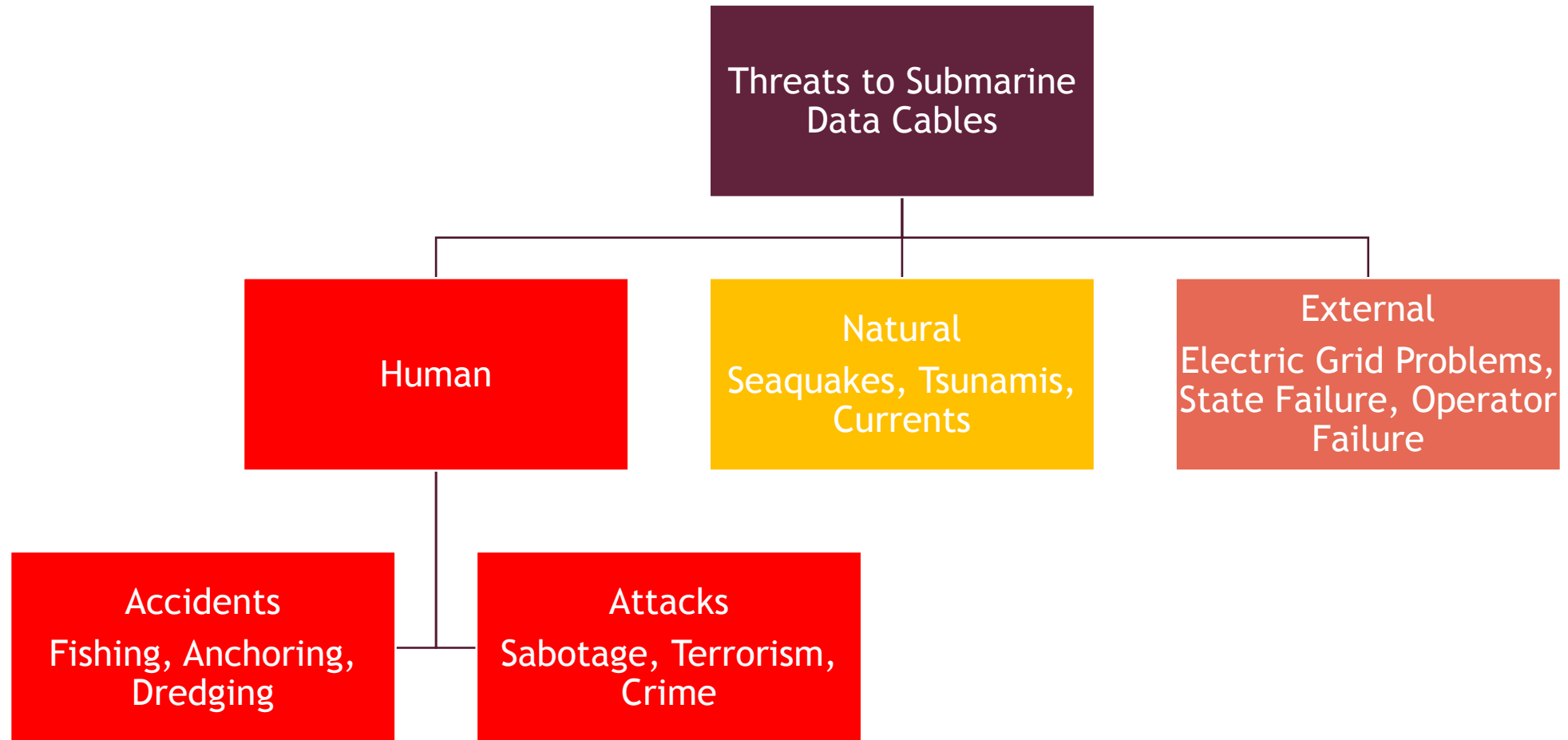




# The CSR: Maritime Data Flows



# The CSR: Maritime Data Flows





# The CSR: Maritime Data Flows

Ireland 'obliged' to build naval capacity to protect underwater cables and pipelines

Britain To Acquire Two Specialist Ships To Protect Underwater Infrastructure

[Reuters](#)



Ministry of Defence

Royal Navy infrastructure protection ship accelerated

**EURACTIV**

**EU countries lay bare Europe's limits in securing critical infrastructure**

**Fearing Sabotage, Germany Strengthens Maritime Security Patrols**

Italian Navy Sails To Defend Mediterranean Gas Pipelines

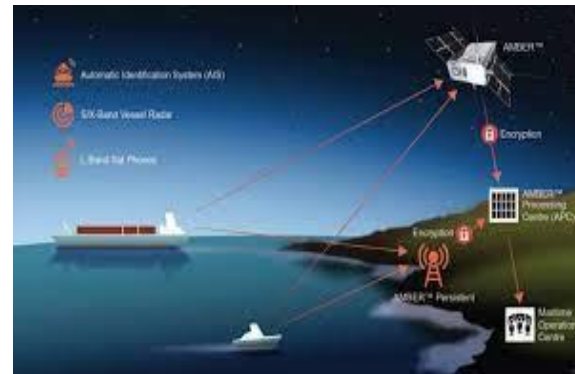
[Bloomberg](#)

# The CSR: Maritime Data Flows

## The Way Forward

- Awareness and Prioritisation
- Information Sharing
- Surveillance
- Collaboration
- Capacity Building
- Industry Cooperation
- National and Regional Maritime Strategies

*Raise Awareness!*





# The CSR: Challenges and Opportunities

- Environment
- Governance remains important
- Security is the glue
- Safety is international obligation
- Cooperation
  - DCoC
  - YCoC
- Capacity Building
- Coordination of strategies, protocols and conventions
- Consensus building on responsible ocean use
  - Source of economic growth (blue economy)
  - Catalyst for healthy, functional domain (sea as an environment)
  - Global consensus of rule of law (blue justice)
- **Rare, lucrative opportunity for SA**
  - **Bunkers, technical services, upkeep, servicing, logistics, etc**



# Conclusion



“Can [Southern] African countries leverage the current disruption and explore how, by improving their trade facilitation environment, they can take advantage of the business opportunities that may arise from the additional traffic passing through their waters?”

Source: Bacrot & Faure - UNCTAD 2024

Questions?



Thank you  
Enkosi  
Dankie