



GOOD GOVERNANCE AFRICA

The Cape Assurance Corridor: Turning Maritime Security into a Regional Export for Southern Africa

By Erika van der Merwe

October 2025

The Cape Assurance Corridor: Turning Maritime Security into a Regional Export for Southern Africa

By Erika van der Merwe

Executive summary

Red Sea insecurity has rerouted significant volumes of global trade around the Cape of Good Hope, shifting both demand and opportunity toward Southern Africa's waters. The region can convert this diversion into a durable preference by offering an exportable public good in the form of assurance. This means delivering safe, predictable, and increasingly low-carbon passage that insurers can price and operators can plan around.

This brief proposes a SADC-led Cape Corridor Assurance Framework that integrates existing regional centres with national Vessel Traffic Services (VTS) feeds to produce daily risk bulletins, incident metrics, and audited port KPIs in formats recognised by underwriters and Protection and Indemnity Clubs (P&I Clubs). A Clean-Corridor Compliance Code with continuous automatic identification systems (AIS) for high-risk calls, designated and monitored Ship-to-Ship (STS) zones, and beneficial-ownership disclosures can help deter shadow-fleets without penalising compliant traffic. Cable resilience should be treated as core corridor infrastructure through chartered no-anchor/no-trawl areas, VTS integration, and pre-contracted rapid repair capabilities.

Service reliability should be showcased through transparent KPI dashboards at Durban, Cape Town, and Ngqura, regularised offshore bunkering at Algoa Bay, and green-fuel bunkering at Saldanha and Walvis Bay, all under strict safety and environmental protocols.

This package complements the African Continental Free Trade Area (AfCFTA) by standardising essential security and regulatory practices, while also endeavouring to respect national sovereignty through a minimum-standards approach. In a world of geopolitical detours, the most profitable route is the one whose risks are visible, managed, and insurable. With pragmatic governance and disciplined execution, Southern Africa can make the Cape Corridor that route.

COVER PHOTO: A ship docks in the Port of Cape Town, South Africa.

Cover photo: GCIS

Policy Recommendations

1. Establish a SADC Cape Corridor

Assurance Framework

- Mandate a 12-month, SADC-led programme that integrates existing regional centres such as the Regional Maritime Information Fusion Centre (RMIFC) in Madagascar and the Regional Coordination Operations Centre (RCOC) in the Seychelles with national VTS.
- These resources feed into a daily risk bulletin, a weekly incident summary, and a quarterly assurance scorecard that is recognised by insurance underwriters and P&I Clubs.
- The region’s maritime risk must be as priceable and predictable as possible for both shipowners and insurers.

2. Adopt a Clean Corridor Compliance

Code across SADC ports

Harmonise three rules across the corridor:

- Continuous AIS for high-risk calls;
- Designated and monitored STS zones;
- Beneficial ownership disclosure for vessels and cargoes flagged as higher risk. Publish enforcement actions (e.g., services denied to “dark” vessels) to deter shadow fleet practices without delaying compliant maritime traffic.

3. Protect digital arteries as critical maritime infrastructure

- Gazette no anchor and no trawl corridors over subsea cable routes and landings.
- Integrate cable alerts into VTS/Maritime Domain Awareness (MDA) dashboards.
- Co-fund rapid cable repair capabilities with telecommunications companies.

4. Deliver service reliability and decarbonisation readiness

- Operationalise Algoa Bay offshore bunkering under the new SARS customs framework with monthly compliance statistics.
- Publish port KPIs (such as waiting time, crane rates, and time in port) for Durban, Cape Town, and Ngqura.
- Pilot green fuel bunkering (Saldanha/Walvis Bay) under strict environmental protocols to meet emerging shipping decarbonisation targets.

Introduction

For centuries, maritime shipping has performed a role that overland networks cannot. By moving bulk commodities and finished goods between distant markets at an unmatched cost and scale, the oceans remain the backbone of modern trade. Today, shipping carries over 80% of world trade by volume and around 70% by value¹. The risk of moving such large volumes of goods is underwritten by a specialised ecosystem of maritime insurers whose pricing decisions directly influence routing choices.

Historically, the Cape of Good Hope was the principal Europe–Asia artery until the Suez Canal (1869) shortened typical voyages by between 3,000–3,500 nautical miles. At typical liner speeds, this amounts to anywhere between ten to fourteen days. As a result, the Suez Canal effectively relegated the Cape Route to a contingency used during times of crises or closures.

Recent geopolitical shocks have shifted routing incentives again. Since late 2023, missile, drone, and explosive uncrewed surface vessel (USV) attacks in the Red Sea and Gulf of Aden have raised the risks associated with a Suez transit. Persistent electronic interference (GPS jamming/spoofing) attempts have compounded navigational hazards along the corridor. Several naval missions, including Operation Prosperity Guardian² and EUNAVFOR Aspides³, have attempted to mitigate the risk of a Suez transit. However, war risk premiums have risen accordingly, with reported spikes up to ~1% of hull value⁴.

Maritime traffic followed the price signal, and by mid-2024, Suez tonnage was down ~70%, Gulf of Aden capacity down ~76%, while arrivals via the Cape were up ~89%⁵. This meant that oil and product flows around the Cape averaged around 8.7 million barrels per day between January and May of 2024, up from 5.9 million barrels per day in 2023. The geography of maritime demand had shifted, and the corridor offering the most predictable security environment began to shape routing decisions.

1 UN Trade and Development (UNCTAD). “Shipping Data: UNCTAD Releases New Seaborne Trade Statistics,” April 23, 2025.
 2 U.S. Department of War. 2025. <https://www.war.gov/News/Tag/264581/prosperity-guardian>
 3 EEAS EUNAVFOR Operation ASPIDES. 2025. <https://www.eeas.europa.eu/eunavfor-aspides>
 4 Economist Intelligence Unit. 2024. “War Risks Raise Marine Insurance Premiums.” <https://www.eiu.com/n/war-risks-raise-marine-insurance-premiums>
 5 UNCTAD. 2024. “Review of Maritime Transport 2024.” UNCTAD, October 22, 2024. <https://unctad.org/publication/review-maritime-transport-2024>.

A Cape passage is longer and meteorologically harder

A Cape passage is longer and meteorologically harder, with winter cold fronts, the Agulhas Current, and steep seas that require conservative routing and robust bunker planning. Services are further apart than along the Mediterranean–Suez Lane, meaning that spares, medical contingencies, and Search-and-Rescue coordination demand wider margins. Nearshore, maritime traffic often intersects with fishing grounds and offshore energy activity (notably in the Mozambique Channel). Consequently, the binding constraints for a vessel’s schedule reliability are often port productivity, predictable bunkering, and clear compliance.

Southern Africa’s port readiness remains uneven. South Africa’s major container hubs have ranked near the bottom of the World Bank’s CPPI⁶, with Durban, Ngqura, and Cape Town clustered near the foot of the table. Walvis Bay and Dar es Salaam perform somewhat better but remain far from industry best practice standards. Offshore bunkering at Algoa Bay was suspended in 2023–24 amid a regulatory gap, although SARS has now finalised a customs framework (effective 30 November 2024) to normalise operations. However, the credibility of the framework will hinge on consistent implementation and transparent compliance reporting⁷.

Despite these constraints, there are several existing domains of effectiveness that can lift the Cape Corridor’s overall performance. Notably, Walvis Bay’s 750,000 TEU terminal moved to an MSC concession, and DP World Maputo has begun a US\$165m expansion to double capacity to ~530,000 TEU⁸. Additionally, the race toward decarbonisation can also count in Southern Africa’s ports’ favour. International shipping is steering toward a net zero target by 2050, and ports that can supply lower-carbon fuels and efficient operations will likely climb world rankings. Saldanha is positioning itself as a green hydrogen and ammonia logistics hub, while Nampont and the Port of Antwerp Bruges are advancing their cooperation at Walvis Bay’s North Port⁹. These initiatives strengthen the

Cape Corridor’s value proposition, provided reliability and compliance keep pace.

Southern Africa’s opportunity to sell assurance and not just transit

Insurers, however, are looking for more than decarbonisation infrastructure. Underwriting depends on predictability, credible visibility of risks, disciplined operations, and metrics that can be audited. To this, Southern Africa already possesses the core elements of a maritime domain awareness backbone. The Regional Maritime Information Fusion Center (RMIFC)¹⁰, located in Madagascar, and the Regional Coordination of Operations Centre (RCOC)¹¹ in the Seychelles already share information on maritime security and coordinated actions at sea. National Maritime Rescue Coordination Centres (MRCCs), port vessel traffic centres, and law enforcement units often produce valuable but fragmented data.

A SADC-mandated framework can integrate these feeds and convert them into market-facing products. In line with the offerings produced by other regions, this should include risk bulletins, incident metrics, and port KPIs. These are products that underwriters trust and operators can plan around. This approach builds on existing African scholarship that links port performance, credible governance, and maritime security outcomes along the Cape Route¹². This research has highlighted that prosperity in Africa’s Blue Economy and the continent’s maritime security are inseparable from one another, and should be governed as a single, integrated agenda rather than two parallel tracks. Accelerating ratification and national incorporation of the Lomé Charter, alongside existing AU frameworks, gives the corridor a durable legal and policy basis for coordinated action¹³.

Key maritime stakeholders will want to see Southern Africa addressing some of the region’s persistent governance issues. This includes targeting the operations of shadow fleets. Shadow fleets, otherwise known as “dark vessels”,

6 World Bank. 2025. “The Container Port Performance Index 2020 to 2024: Trends and Lessons Learned.” September 25, 2025. <https://www.worldbank.org/en/topic/transport/publication/cppi-2024>.

7 Maritime Review. “SARS Rules for Offshore Bunkering Finalised.” November 23, 2024. <https://maritimereview.co.za/Articles/ArtMID/397/ArticleID/556/CategoryID/14/CategoryName/Shipping/SARS-rules-for-offshore-bunkering-finalised>

8 The Brief. “Nampont Hands over Walvis Bay Container Terminal Operations to MSC Subsidiary TIn”. September 11, 2024. <https://thebrief.com.na/2024/09/nampont-hands-over-walvis-bay-container-terminal-operations-to-msc-subsidiary-tin>.

9 CSIR. “CSIR Leads Strategic Master Planning for West Coast Green Hydrogen Hub.” 2025. <https://www.csir.co.za/csir-leads-strategic-master-planning-west-coast-green-hydrogen-hub>.

10 CRFIM. “RMIFC Regional Maritime Information Fusion Center” 2024. <https://crfim.vercel.app/en>.

11 Valmont, Patrick. 2023. “RCOC.” Ministry of Internal Affairs Seychelles. August 3, 2023. <https://mia.gov.sc/about/departments/regional-maritime-security-safety/rcoc>.

12 Walker, Tim, and Denys, Reva. 2025. “With three bold moves, maritime security in Africa could be plain sailing”. Institute for Security Studies. <https://issafrica.org/iss-today/with-three-bold-moves-maritime-security-in-africa-could-be-plain-sailing>

13 Swanepoel, Ernesta. 2017. “Policy Briefing 163: The Nexus between Prosperity in the African Maritime Domain and Maritime Security.” <https://saiia.org.za/wp-content/uploads/2017/07/Policy-Briefing-163.pdf>.



ABOVE: Global shipping routes, ports and maritime domain awareness centres across the southern tip of Africa.

are a network of primarily older tankers that use deceptive practices such as intermittent AIS, rapid flag changes, opaque ownership structures, and unmonitored ship-to-ship transfers to evade oversight¹⁴. The operations of shadow fleets in a region’s waters externalise pollution and reputational risks onto coastal states and delay other compliant vessels when enforcement nets tighten. A Clean Corridor Compliance Code that ensures AIS continuity, designated and monitored STS zones, and beneficial ownership disclosure would reduce friction for legitimate operators and likely help deter shadow fleets. Publishing corridor-level enforcement outcomes signals that the route is clean by design and would increase confidence in its operations.

Another piece of critical infrastructure that Southern Africa will need to prioritise is subsea cables. The March 2024 multi-cable failures along West Africa¹⁵ demonstrated how digital outages can cascade through banking, telecommunications, and logistics. Making cable protection a standard element of VTS and MDA, while ensuring rapid repair capability, further bolsters the corridor’s reliability.

The Cape Corridor’s value proposition hinges on service reliability. With Algoa Bay bunkering now regularised by SARS, South Africa can publish an expansion roadmap and monthly compliance statistics to restore confidence in the port. In parallel, public port KPIs (waiting time, crane rates, time in port) in Durban, Cape Town and Ngqura can create performance transparency that underwriters reward in their pricing. Alternative fuel bunkering at Saldanha and Walvis Bay under strict environmental protocols can align the corridor’s reliability with broader maritime decarbonisation objectives. South Africa can further catalyse its role in the Cape Corridor’s operations by finalising its national maritime security strategy, strengthening whole-of-government coordination across transport, defence, and customs, while also demonstrating compliance at key ports. This can help position South Africa as a guardian of the Cape Route within a larger SADC-led framework, in which the country leads by example while avoiding a purely national response to a regional opportunity¹⁶.

14 Rodriguez-Díaz, Emilio, Juan Ignacio Alcaide, and Nieves Endrina. 2025. “Shadow Fleets: A Growing Challenge in Global Maritime Commerce.” *Applied Sciences* 15 (12): 6424. <https://doi.org/10.3390/app15126424>.

15 Internet Society. “2024 West Africa Submarine Cable Outage Report.” <https://www.internetsociety.org/resources/doc/2024/2024-west-africa-submarine-cable-outage-report/>.

16 Walker, Timothy. 2024. “Positioning South Africa as Guardian of the Cape Route”. ISS Africa. 2024. <https://issafrica.org/iss-today/positioning-south-africa-as-guardian-of-the-cape-route>.

Recommended package

1. SADC Cape Corridor Assurance Framework (CCAF)

- Lead and mandate: A SADC Secretariat (Transport & Security joint tasking) is to chair a Corridor Assurance Task Team for 12 months. Members should include the RMIFC, RCOC, national MRCCs/VTS, port authorities, navies/coast guards, customs authorities, telecommunications and cable operators, and an observer panel of underwriters and brokers.
- Data and products: The objective should be to adopt a common schema that spans AIS continuity, incident classification by type and location, response times, KPIs for ports (time in port, waiting time, crane rates), and STS permissions. Secondly, the production of a daily risk bulletin, a weekly summary, and a quarterly assurance scorecard with consistent definitions and audit trails must be formalised. Present these in a format used by the London market's Joint War Committee and P&I Clubs so outputs can feed directly into pricing notes.

2. The Clean Corridor Compliance Code

- Rules:
 - i. Continuous AIS for high risk calls;
 - ii. Designated, monitored STS zones;
 - iii. Beneficial ownership declarations for vessels with elevated risk profiles.
- Enforcement: Publish monthly corridor-level stats on detentions, denied services and verified AIS violations, and ensure appeal channels to protect compliant operators from unnecessary delays.
- Alignment: Map the code to align with the Joint War Committee's frameworks that are used by London-based underwriters.

3. Subsea cable resilience

- Protective zoning: Gazette no anchor/no trawl corridors over cable routes and landings. This should be included in pilotage notes and the harbour master's instructions.
- Operations: Integrate cable alerts into the CCAF bulletin and execute annual multi-agency exercises that involve ports, navies and coast guards, and telecommunications consortia.
- Capability: Co-fund a rapid repair arrangement positioned on the southwest African coast.

4. Service reliability & green fuel readiness

- Port performance: Publish quarterly key performance dashboards for Durban, Cape Town, and Ngqura to anchor performance-based management and signal reliability to insurance markets.

- Green fuels: Launch bunkering for e-methanol or ammonia at Saldanha and Walvis Bay that is tied to strict safety and environmental protocols and clear, regulator-approved guidelines.

Implementation Considerations

As far as feasibility and political settlement are concerned, this package does not require the creation of new agencies. It leverages existing institutions (RMIFC/RCOC) and incremental regulatory harmonisation. This approach is most compatible with current political realities and can draw on existing domains of effectiveness around Southern Africa's port networks (e.g., Maputo's expansion and Walvis Bay's concession). This ensures a practical and network-embedded reform agenda. In terms of funding and sustainability, a blended model that combines a modest corridor levy on bunkering or port dues along with national in-kind staffing for the watch function, as well as technical assistance from development partners, can be utilised. Annual public reporting should link corridor levy proceeds to specific deliverables, such as risk bulletins, KPI dashboards, and cable protection exercises.

Implementation will need to respect sovereignty and accommodate differences in regulatory capacity among Southern Africa's states. A minimum standards approach in which SADC sets a small number of corridor rules and data standards while leaving operational detail to national authorities can help mitigate concerns about ceding control and preserve room for healthy competition on service quality among individual states. Locating leadership in an SADC-mandated task team and anchoring participation in a transparent memorandum of understanding will help manage political sensitivities while sustaining momentum.

Mutual security and regulatory standardisation across the corridor are also enabling steps for the AfCFTA. Harmonising baseline rules on AIS continuity, designated STS zones, cable protection measures, and incident reporting definitions reduces non-tariff barriers and aligns the Cape Corridor's governance with wider continental objectives on trade facilitation and services liberalisation. In practical terms, the corridor can serve as a pilot for AfCFTA implementation in the maritime domain while reinforcing the African Union's other maritime frameworks, notably the 2050 Africa Integrated Maritime Strategy¹⁷ and the Lomé Charter¹⁸.

¹⁷ African Union. 2012. "Africa's Integrated Maritime Strategy". https://au.int/sites/default/files/documents/30929-doc-2050_aim_strategy_eng_0.pdf

¹⁸ African Union. 2016. "African Charter on Maritime Security and Safety and Development in Africa (Lomé Charter)" <https://au.int/en/treaties/african-charter-maritime-security-and-safety-and-development-africa-lome-charter>.



Risks and Mitigations

1. Data sharing reluctance: Using tiered access by differentiating between public dashboards and restricted vessel-specific data, as well as signing a SADC Memorandum of Understanding on data custody.
2. Capacity bottlenecks: Starting the project with pilot ports and then scaling with documented gains to the wider Southern Africa region.
3. Industry buy-in: Seat underwriters and shipowners on the SADC advisory panel to facilitate the co-designing of metrics and bulletins.
4. Regulatory fragmentation: Adopt model notices for AIS, STS, and cable protection to minimise variance and legal friction.

The SADC Secretariat on Transport and Security convenes and monitors the Corridor Assurance Task Team. The RMIFC and RCOC provide the 24/7 watch floor and fusion and coordination backbone, while national MRCCs, VTS centres and port authorities serve as primary data sources and implement AIS/STS/cable rules alongside navies and coast guards. Revenue authorities operationalise the bunkering framework and compliance reporting stipulations. Telecommunications consortia partners on cable protection and rapid repair. An observer panel of P&I Clubs, underwriters, brokers and shipowner associations ensures that the task team’s outputs are pricing relevant.

Monitoring and Evaluation

1. Reduction in time in port and waiting time at pilot ports.
2. Bunkering uptime at Algoa Bay and designated pilot ports.
3. Share of compliant STS conducted inside designated zones and AIS continuity compliance rates.
4. Incident detection to response times.
5. Underwriter feedback on the use of bulletins and scorecards in their pricing notes.

Conclusion

Southern Africa can convert a temporary diversion into a sustained competitive advantage by making assurance a regional export. Assured maritime transit is safe, predictable, and increasingly low-carbon. The route to that outcome is governance first. It will necessitate the integration of the region’s existing maritime information architecture, setting high-impact compliance rules, protecting subsea cables as critical infrastructure, and showcasing service performance with transparent KPIs. In a world of geopolitical detours, the most profitable maritime route is the one whose risks are visible, managed, and insurable. Today, that is within Southern Africa’s reach.



ABOVE: The Port of Durban, in South Africa.

Photo: Photo by David Krüger / DPA / dpa Picture-Alliance via AFP

For more information on this policy briefing, contact our Good Governance Africa advisory services team.

Contact us

Tel: +234-1-2809100

Email: info.nigeria@gga.org

Web: www.gga.org

