

POSITION PAPER:
COASTAL CITIES
AND THE BLUE
ECONOMY

SEPTEMBER 2026



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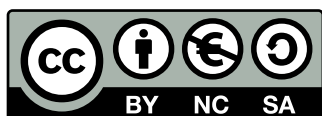
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List of Acronyms

AU	African Union
AU-IBAR	African Union – Inter-African Bureau for Animal Resources
BCMM	Buffalo City Metropolitan Municipality
CSIR	Council for Scientific and Industrial Research
DEDTEA	Department of Economic Development, Tourism and Environmental Affairs
DDFE	Department of Forestry, Fisheries and the Environment
DPME	Department of Planning, Monitoring and Evaluation
DST	Department of Science and Technology
ECSECC	Eastern Cape Socio-Economic Consultative Council
EEZ	Exclusive Economic Zone
EU	European Union
FAO	Food and Agriculture Organization of the United Nations
GDP	Gross Domestic Product
ICM	Integrated Coastal Management
ICMR	Institute for Coastal and Marine Research
IDP	Integrated Development Plan
IORA	Indian Ocean Rim Association
LED	Local Economic Development
MARIS	Marine and Antarctic Research Centre for Innovation and Sustainability (UCT)
MPA	Marine Protected Area
NDP	National Development Plan
NMBM	Nelson Mandela Bay Municipality
NMU	Nelson Mandela University
OECD	Organisation for Economic Cooperation and Development
SAAMBR	South African Association for Marine Biological Research
SACN	South African Cities Network
SADC	Southern African Development Community
SAIMI	South African International Maritime Institute
SANBI	South African National Biodiversity Institute
SANSA	SA National Space Agency
SDF	Spatial Development Framework
SDG	Sustainable Development Goal
SEZ	Special Economic Zone
SRMA	Strategic Resource Mobilisation and Advancement (at NMU)
UCT	University of Cape Town
UN	United Nations
WIOMSA	Western Indian Ocean Marine Science Association



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Glossary

AQUACULTURE: Farming of aquatic organisms in controlled marine or freshwater environments, including near-shore and offshore production systems.

BLUE ECONOMY: Sustainable use of ocean resources for economic growth, improved livelihoods, and jobs while preserving ocean ecosystem health (World Bank & UNDESA, 2017).

BLUE JUSTICE: Framework ensuring equitable distribution of ocean economy benefits, meaningful community participation, recognition of coastal community rights, and restorative remediation of historical exclusions.

EXCLUSIVE ECONOMIC ZONE (EEZ): Maritime zone extending 200 nautical miles from the coast, within which the state holds special rights over marine resources.

GREEN HYDROGEN: Hydrogen produced by electrolysis using renewable energy; a strategic maritime decarbonisation and export pathway for South Africa.

MARINE PROTECTED AREA (MPA): A geographically defined ocean space recognised and managed to achieve long-term conservation of nature and ecosystem services.

MARINE SPATIAL PLANNING: A public process allocating the temporal and spatial distribution of human activities in marine areas to achieve ecological, economic, and social objectives.

OPERATION PHAKISA: South Africa's 2014 initiative to fast-track ocean economy development, targeting R177 billion in gross domestic product (GDP) and one million jobs by 2033.

SMALL-SCALE FISHERIES: Traditional or artisanal fishing using small capital amounts, characterised by short trips and strong community dependence on marine resources.

SPECIAL ECONOMIC ZONE (SEZ): Geographically designated area with distinct regulations designed to attract investment – the Coega SEZ in Nelson Mandela Bay is Africa's largest.



Foreword

South Africa's coastline stretches along the Atlantic and Indian oceans that are among the world's most productive ocean systems and lucrative marine corridors. This offers coastal cities opportunities to tap into the blue economy for local economic development (LED). The blue economy is a major driver of urban and regional development throughout the world. In 2025, the G20, under the Presidency of South Africa, committed members to "advancing a sustainable and inclusive ocean economy" and enabling the blue economy through policy and trade, and over a decade ago, South Africa initiated Operation Phakisa to unlock the potential of the ocean economy.

This position paper explores the blue economy in four of South Africa's coastal cities (Nelson Mandela Bay, Buffalo City, Cape Town and eThekweni). It is based on a comprehensive and wide-ranging report produced by the SACN's Sustainable and Resilient Cities Programme. The research combined primary survey evidence from expert stakeholders and the analysis of a range of municipal strategic and planning reports, national policies and legislations, international case studies and field base analysis. Together, these inputs constitute a detailed city-level blue economy diagnostic for the cities.

The research found that cities lack a cohesive strategy for the blue economy and that existing initiatives are fragmented. It also recognised that developing the blue economy is a complex endeavour, involving integrating economic growth with environmental sustainability and social inclusion. The SACN believes that this position paper is the first step to unlocking the potential of the blue economy for sustainable LED and job creation in coastal cities. It is intended to provide support to municipal executives and officials in understanding and developing the opportunities available for South African coastal cities in the blue economy. The SACN looks forward to working with the cities to leverage the blue economy.

Nosipho Hlatshwayo
SACN CEO



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INTRODUCTION

South Africa's coastline stretches along 3924 km on two oceans (the Atlantic and the Indian) and is home to a wide variety of marine ecosystems that support commercially important fish stocks, international shipping routes and coastal tourism industries (Struwig et al., 2024). The country's maritime Exclusive Economic Zone (EEZ) covers 1.5 million km², making it larger than the nation's landmass (ibid). This immense ocean space has abundant biodiversity, as a result of being flanked by the Benguela and Agulhas current systems, substantial offshore oil and gas resources, strategic shipping routes to Europe, Asia and America. These factors mean that South Africa is well positioned to benefit from the oceans economy and specifically the blue economy.

Ocean economy and blue economy both refer to activities linked to ocean resources, such as fishing or shipping. However, the blue economy, which was introduced at the 2012 UN Conference on Sustainability incorporates sustainability, including human wellbeing and social equity. "There is no single definition of the blue economy or ocean economy", as various terminologies are used by global, national and subnational institutions (OECD, 2024: 15). The World Bank's definition is the "sustainable use of ocean resources for economic growth, improved livelihoods, and jobs while preserving ocean ecosystem health" (World Bank & UNDESA, 2017),¹ while the African Union's (AU's) definition includes inland waterways, such as lakes and rivers (AU-IBAR, 2019).

In 2020, the ocean economy contributed an estimated US\$2.6 trillion to global economic output, having grown by an average of 2.8% per year since 1995 (OECD, 2025), and about US\$300 billion (in 2018) to the African economy, according to the AU (World Bank Group, 2022). In 2025, the G20, under the Presidency of South Africa, recognised the importance of the ocean economy for "climate stability, economic prosperity, biodiversity, and human wellbeing" (G20, 2025: 1).

With eight maritime gateways, South Africa is at the heart of the geopolitically and commercially valuable 17-member Southern African Development Community (SADC), which has a combined market of 390 million people. Most (98%) of the country's international trade is conducted through its eight main commercial ports: Durban and Richards Bay (KwaZulu-Natal), East London, Ngqura and Gqeberha (Eastern Cape), and Mossel Bay, Cape Town and Saldanha Bay (Western Cape).² Durban has the largest container terminal in Africa, while Richards Bay is one of the world's biggest coal export centres. However, despite this strategic positioning, the ocean economy in South Africa is still very underutilised compared to countries such as Norway or New Zealand (OECD, 2025).

This paper examines the blue economy within the context of four coastal metropolitan municipalities (Nelson Mandela Bay, Buffalo City, Cape Town and eThekweni), based on a diagnostic desktop study that included a review of relevant municipal, provincial, national and international documents and an online survey of 60 expert

1 <https://www.worldbank.org/en/news/infographic/2017/06/06/blue-economy>

2 <https://www.freightnews.co.za/article/transnet-sets-expansion-sights-on-africa-middle-east>



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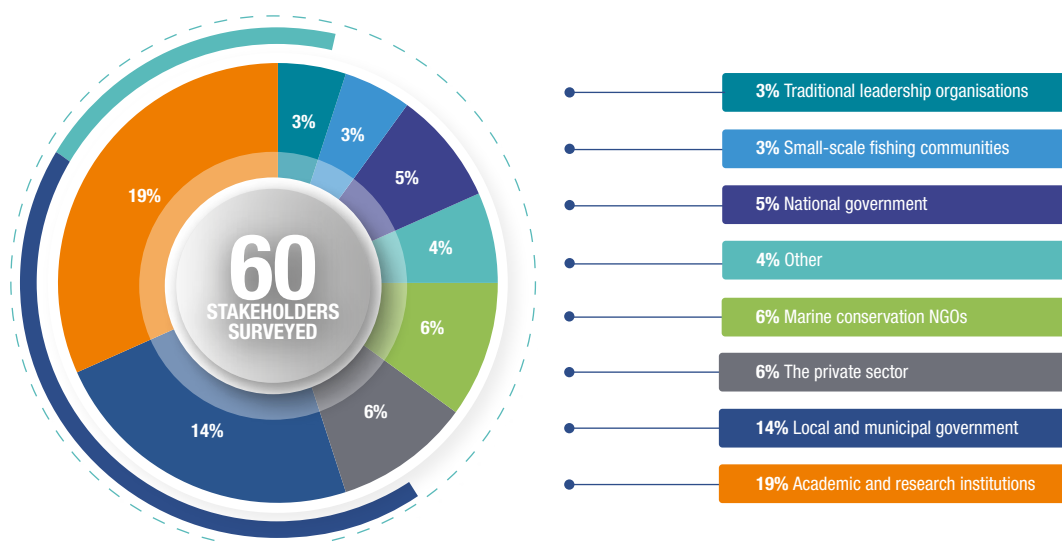


stakeholders during March/April 2026 (SACN, 2026). After describing the national government's strategy for the blue economy (Operation Phakisa), the paper presents a strategic review of the four cities and their approach to the blue economy. It then highlights findings from the research that inform the recommendations for cities, with the aim of supporting cities to develop strategies that enhance the contribution of the blue economy to their local economic development (LED).

1.1 Research design and methodology

The methodology combined a primary stakeholder survey analysis (N=60), documentary analysis of city IDPs, economic strategies and Operation Phakisa documentation, and comparative analysis of international blue economy models. As Figure 1 demonstrates, the survey captures a broad range of perspectives, from those who govern the blue economy (government), to those who research it (academic and research institutions), those who depend on it for livelihoods (small-scale fishing communities), those who seek to invest in it (private sector), those who protect its ecological foundation (marine conservation non-governmental organisations) and those whose cultural heritage it encompasses (traditional leadership organisations). The respondents were from Nelson Mandela Bay (38%), eThekwin (28%), Buffalo City (12%) and Cape Town (10%). The large share (19/60) of academic and research institutions in the sample stems from the expert knowledge focus of this survey.

FIGURE 1: Sector split of 60 stakeholders surveyed





2 OPERATION PHAKISA

Launched in 2014, Operation Phakisa (Sesotho for “hurry up”) is South Africa’s programme for unlocking the potential of the ocean economy through balancing economic growth with sustainable ocean governance. It is “modelled around the Malaysia’s ‘Big Fast Results’ (BFR) delivery mechanism”, which has been adapted to South Africa’s context and development priorities of the National Development Plan (NDP). Designed as a cross-sector programme, Operation Phakisa’s aim is to bring government, business, civil society and labour together in “labs” to analyse problems and explore opportunities in the ocean economy (DPME, 2022: 9–10). The programme is coordinated by the Presidency, monitored by the Department of Planning, Monitoring and Evaluation (DPME) and implemented through relevant sector departments and their partners. It focuses on six priority sectors, each driven by specific national government departments.

Although national government departments are drivers of Operation Phakisa, the programme’s implementation is intended to be shared across the three spheres of government.

- National government is responsible for setting polity and managing offshore oil/gas rights, small harbours and commercial port operations and national marine protection services.
- Provincial governments have a coordinating role to play, through regional economic plans and managing coastal infrastructure.
- Municipal functions include facilitating tourism and LED, maintaining coastal amenities, monitoring water quality, protecting local ecosystems, managing waste and preventing pollution. As the sphere of government closest to the people, municipalities also have an important role to play in facilitating stakeholder and community processes.

Building on the foundation of Operation Phakisa, the DFFE is in the process of finalising South Africa’s Oceans Economy Master Plan, which will provide a “roadmap for the next phase of blue economy development”.³ The focus will be on the following subsectors: Marine transport, marine manufacturing and repairs, aquaculture, fisheries, and offshore oil and gas (DFFE, 2025).

3 <https://maritimereview.co.za/Articles/ArtMID/397/ArticleID/2172/CategoryID/32/CategoryName/Tourism/Long-awaited-Ocean-Economy-Master-Plan-nears-finalisation>

2.1 Alignment with international policies

South Africa's approach to the blue economy is aligned to international commitments and agreements, in particular the UN Sustainable Development Goal (SDG) 14 and the AU's Blue Economy Strategy.

The aim of SDG 14, known as Life Below Water, is to conserve and sustainably use the oceans, seas and marine resources for sustainable development. Its 10 targets address marine pollution, marine acidification, sustainable fisheries, ocean conservation, small-scale fisheries and ocean knowledge (UN, 2015, 2022).

The AU recognises the blue economy as a growth sector and identifies the need to develop a blue economy framework in its Agenda 2063 Framework Document (AU, 2015). In 2019, the AU published its Blue Economy Strategy (AU-IBAR, 2019), which was developed taking into consideration the Africa Integrated Maritime Strategy (AU, 2012) and provides the continental blueprint for sustainable development of ocean economies. An implementation plan (2021–2025) was subsequently developed (AU-IBAR, 2020). The five thematic areas are fisheries and aquaculture, shipping and maritime safety, coastal tourism and climate, energy and mineral wealth, and governance and jobs.

In addition, South Africa is a founding member of the Indian Ocean Rim Association (IORA), an intergovernmental organisation of 23 members states bordering the Indian Ocean, that was formed to promote regional cooperation. It provides a complementary regional platform for blue economy cooperation (WIOMSA & UN-Habitat, 2021), as the blue economy is one of IORA's two cross-cutting issues.⁴

2.2 Blue economy priority sectors

Operation Phakisa identified six priority sectors for growing the blue economy, but implementation results are mixed, as outlined below. Two serious shortcomings of the initiative are that its benefits are largely going to existing industrial actors, reflecting a limited economic perspective (Bond, 2019), and that it excludes small-scale fisher communities (Sowman & Sunde, 2024).

Marine transport and manufacturing

National department responsible: Department of Transport

South Africa is strategically located on international shipping routes, has large volumes of cargo (imports and exports) that move through the country's ports and an expanding offshore oil and gas industry. The focus is on upgrading port infrastructure and investing in oil rigs/ship repair and boat building industry, in order to serve these maritime operations.



OUTCOMES:

Port infrastructure in Durban, Cape Town and East London has been upgraded and investment made in maritime infrastructure and dry docks (DFFE, 2025).

4 The other cross-cutting issue is Women's Economic Empowerment.

Aquaculture

National department responsible: Department of Forestry, Fisheries and the Environment (DFFE)

In 2023, aquaculture production surpassed 90 million tonnes worldwide and produced US\$284 billion in first-sale value (FAO, 2024), but South Africa's share is less than 0.006% of the global production, despite operating in the Benguela Current, one of the most biologically productive marine upwelling systems. The focus is on expanding fish, shellfish and seaweed farming production capacity.



OUTCOMES:

28 new aquaculture projects and 24 aquaculture development zones identified (DFFE, 2025). In 2018, the Aquaculture Development Bill was published but has not yet been enacted into law, reflecting the slow development of the aquaculture industry due to challenges that include regulatory bottlenecks, limited financing and concerns about the environment.

Marine protection services and ocean governance

National department responsible: DFFE

South Africa's large EEZ needs to be effectively governed. The focus is on developing an integrated ocean governance framework, to protect South Africa's oceans from illegal activities and promote economy development.



OUTCOMES:

A Marine Spatial Planning Act (South Africa, 2018); 20 additional gazetted marine protected areas (MPAs), increasing the surface area of MPAs from 0.4% to 5.4% of the EEZ; and a National Framework for Marine Spatial Planning in South Africa (DFFE, 2021); a National Coastal and Marine Spatial Biodiversity Plan for South Africa (DFFE, SANBI & NMU, 2022).

Small harbours development

National department responsible: Department of Public Works and Infrastructure

Pre-1994, the only proclaimed small harbours were found in the Western Cape. The focus is on upgrading existing small harbours and establishing new harbours in the underserved provinces of Eastern Cape, KwaZulu-Natal and Northern Cape, with the aim of unlocking local economic opportunities and improving coastal communities.



OUTCOMES:

Feasibility studies completed for small harbours "Tier 1 sites": Port St Johns, Port Nolloth, Port Shepstone (DFFE, 2025), and refurbishment of the proclaimed harbours.

Coastal and marine tourism

National department responsible: Department of Tourism

Marine tourism contributes an estimated R65-billion to the South African economy every year. The sector involves beach tourism (around 30 million visits per year), ocean sports (surfing, diving, kayaking, whale watching, shark cage diving), the South African sardine run (the world's largest biomass marine event) and coastal heritage tourism (Potgieter, 2017). The focus is on developing coastal economic nodes and nature-based tourism, improving beach precincts and nature reserves.



OUTCOMES:

Launch of the Coastal and Marine Tourism Implementation Plan, which focuses on six coastal marine tourism nodes: Durban and uMkhanyakude District in KwaZulu-Natal; Port St Johns to Coffee Bay, as well as East London and Port Elizabeth in the Eastern Cape; Cape Town in the Western Cape and the West Coast in the Northern Cape.

Offshore oil and gas

National department responsible: Department of Mineral Resources and Energy

The focus is to conduct seismic and exploratory surveys to find energy reserves (oil and gas) off South Africa's coast. The target is to drill 30 exploration wells in 10 years and increase the production of oil and gas to cover about 80% of the country's current oil and gas imports.⁵



OUTCOMES:

The granting of new oil/gas exploration rights and establishment of environmental baselines (DFFE, 2025). However, the offshore exploration authorisations are being challenged by civil society and environmental groups, leading to delays (Sowman & Sunde, 2024).

Potential blue economy growth sectors

The research also identified other opportunities that cities could explore. Although the following sectors are not fully integrated in blue economy policy frameworks, they are ecologically and economically synergistic.

Blue carbon



The carbon sequestration and storage potential of coastal mangroves, seagrasses and saltmarshes is South Africa's most undervalued asset of its coastal ecosystems. Coastal blue carbon ecosystems in South Africa sequester about 12 million tonnes of CO₂ equivalent and may be able to restore an additional 200 000 tonnes per year (Adams et al., 2025). The value of this is US\$2–6 million annually for coastal cities that invest in restoring mangroves, seagrass, and saltmarsh at current prices (Serrano et al., 2019). Blue carbon restoration offers a range of conservation co-benefits and livelihood diversifications for coastal fishing communities in the form of restoration employment, carbon registry participation, and eco-tourism development associated with restored coastal habitats.

Marine biotechnology



This rapidly developing field uses marine organisms, marine biological systems and processes for pharmaceutical, agricultural, environmental and industrial applications (EU, 2021). For South Africa, marine biotechnology could offer significant opportunities, as the Benguela and Agulhas currents are among the world's most biodiverse marine environments, hosting thousands of species with undocumented pharmaceutical and industrial applications. The research foundations of NMU's ICMR, UCT's seaweed biotechnology programme and CSIR's marine natural products group are present, but commercialisation pathways from the lab to the market have not been developed.

Green hydrogen



South Africa's renewable energy resources, including exceptional offshore wind resources, coupled with its proximity to the European markets for hydrogen imports and existing deep-water port infrastructure, makes it one of the most competitive of potential export locations for green hydrogen in the world. South Africa's Hydrogen Valley initiative links the Platinum Belt to coastal export terminals, running from Mokopane (Limpopo) to Johannesburg and then to Durban (DST, 2021). This initiative provides a national infrastructure context into which coastal city hydrogen strategies could integrate. Nelson Mandela Bay is one of the three priority green hydrogen development zone, with Coega SEZ as a potential hydrogen hub (ibid: 45).

5 <https://www.operationphakisa.gov.za/operations/oel/oilGas/Pages/default.aspx>



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STRATEGIC REVIEW OF SOUTH AFRICAN COASTAL CITIES

Coastal municipalities provide the main points of contact between the blue economy and urban development, the labour market and infrastructure systems in South Africa. Five of the eight major commercial ports, the majority of maritime jobs and the bulk of the coastal tourism, fisheries and marine manufacturing centres are located in four cities: Nelson Mandela Bay/Gqeberha and Buffalo City/East London (Eastern Cape), Cape Town (Western Cape) and eThekweni/Durban (KwaZulu-Natal).

The Eastern Cape is the only province to have developed an Oceans Economy Master Plan, which was adopted by the Eastern Cape Cabinet in December 2019 (NMU, 2019). In the Western Cape, the City of Cape Town has a special purpose vehicle, Blue Cape,⁶ which is a joint venture between the City and the V&A Waterfront for growing a resilient ocean (blue) economy, while KwaZulu-Natal's Integrated Maritime Strategy (KZN DEDTEA, 2021) guides the province's ocean-based industrialisation, job creation and skills development. All provinces have developed coastal management programmes that are aligned with the National Environmental Management: Integrated Coastal Management Act (ICM) Act 24 of 2008 that was updated by the National Environmental Management: ICM Amendment Act 36 of 2014. The four coastal cities are reviewed below.

3.1 Nelson Mandela Bay (Gqeberha)

Of the stakeholders surveyed, 70% supported that Nelson Mandela Bay (Gqeberha) should be the pilot city for exploring the development of a city-based blue economy strategic framework. The Eastern Cape's Oceans Economy Master Plan identifies Nelson Mandela Bay (Gqeberha) as a priority node for aquaculture, marine transport and manufacturing, maritime infrastructure and coastal tourism development sectors (NMU, 2019). Its strategic assets include:

- Only city with two commercial, deep-water ports: The Port of Gqeberha can handle 950 000 TEUs per year (as of 2023) and has dry dock, ro-ro and bulk cargo facilities, while the Port of Ngqura has a dedicated container terminal and a transshipment capacity of over 1.5 million TEUs.
- The largest special economic zone (SEZ) in Africa in the Coega SEZ that covers approximately 11 000 hectares, and a planned 440-hectare aquaculture development zone.
- A centre for maritime education and research, with the Nelson Mandela University's Institute for Coastal and Marine Research (ICMR) and the South African International Maritime Institute (SAIMI), which has 18 active maritime training programmes (SAIMI, 2023).
- Eastern Cape Socio-Economic Consultative Council (ECSECC) Satellite Account baseline for blue economy-related city data.

6 <https://blue-cape.co.za/>



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The oceans or the blue economy are mentioned in the municipality's five-year integrated development plans (IDPs). The 2016–2021 IDP refers to “development of a Blue Oceans Economy” (NMBM, 2016: 30), while the 2022–2026 IDP speaks of the need to target “key high impact sectors of the economy which include Oceans economy” (NMBM, 2022: 39). However, the municipality does not have a city-focused blue economy strategy. This finding is believed to hinder blue economy development in the city.

3.2 Cape Town

Cape Town has a well-established blue economy ecosystem, driven by programmes such as the Blue Cape initiative that is a joint venture between the City and the V&A Waterfront. The V&A Waterfront attracts 24 million annual visitors and generates R15.7 billion in revenue (City of Cape Town, 2024). Cape Town also has a strong marine research community and well-developed coastal tourism (ibid). Its strategic assets include:

- Strong marine and coastal tourism (whale watching, dive tourism, and ocean sports)
- Advanced port infrastructure
- The Blue Cape marine manufacturing cluster that includes superyacht repair, boat building and marine equipment.
- Strong marine research institutions, including University of Cape Town (UCT), Stellenbosch University, Council for Scientific and Industrial Research (CSIR) Oceans and Coasts and South African National Biodiversity Institute (SANBI).

The programmes for coastal management, climate adaptation and ecosystem restoration in Cape Town are relatively well developed and complement the provincial and national coastal management programmes and coastal governance instruments in place. However, the term ‘blue economy’ is not used in the City’s IDP 2022–2027 (City of Cape Town, 2022), and blue economy-related activities are spread across multiple City directorates, i.e., economic development and environmental management and spatial planning.

3.3 eThekweni (Durban)

eThekweni is home to sub-Saharan Africa’s busiest container port (2.8 million TEUs per annum) and an important logistics hub, as well as a major coastal tourism destination, welcoming approximately five million beach visitors annually. Coastal management and climate resilience are a high priority for the municipality’s investment, as a result of high impact coastal flooding events that are being intensified by climate change (WIOMSA & UN-Habitat, 2021). Its strategic assets include:

- Container port with a planned upgrade programme of R100 billion (2022–2030).
- Logistics hub, the ‘blue corridor’ (coordinated ocean economy belt) between Durban and Richards Bay, and the Aerotropolis development.
- Coastal zone management instruments and established municipal coastal committees.
- Innovative approach to coastal environmental management through the Wildtrust’s Blue Port Project that uses waste-trapping booms.⁷

7 <https://www.wildtrust.co.za/wildoceans-projects>

The term 'blue economy' is not visible in the City's main IDP but appears in the port and logistics, tourism and risk management sections as separate agendas for development of the blue economy (eThekweni Municipality, 2025). New opportunities for the integration of the blue economy are emerging within eThekweni's LED Strategy (2025–2030) and Marine Tourism Masterplan but are not sufficiently linked to priorities in the maritime sector. In 2026, eThekweni established a Blue Economy Forum.⁸

3.4 Buffalo City (East London)

East London is South Africa's only river port and has rail and road links to the Free State, Gauteng, and KwaZulu-Natal. The Eastern Cape Oceans Economy Master Plan identifies it as a priority port for growth and development, in sectors that include maritime transport and manufacturing, ship and rig servicing, coastal tourism and aquaculture (NMU, 2025). Its strategic assets include:

- Location on the Eastern Cape Wild Coast, which has outstanding marine and coastal biodiversity, representing unexploited opportunities for aquaculture and ecotourism.
- Port with Eastern Cape's only operational dry dock and a specialised ro-ro and automobile terminal.
- East London IDZ (manufacturing and marine services).
- Proximity to small harbours that are home to currently under-served communities and are included in the national small harbours development programme (Port St Jones, Morgan Bay).

In the city's 2021–26 IDP and the 2024/25 revised draft, blue economy-related content appears under economic development, spatial targeting around the port and infrastructure investment clusters. Highlighted are port-centric interventions, dry-dock development, ro-ro facilities, and automotive logistics, while linkages to Operation Phakisa are mentioned as project-specific elements, not a planning process (BCMM, 2024).

8 <https://www.durban.gov.za/press-statement/ocean-innovation-africa-summit-ends-with-bold-plan-to-scale-africas-blue-economy>



4 FINDINGS



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The findings are based on the stakeholder survey and desktop research.

4.1 Lack of a dedicated blue economy city function

The cities do not mainstream the blue economy in their IDPs or have a standalone blue economy strategy, nor do they have coordinated municipal blue economy frameworks and plans linking Operation Phakisa and sector plans together (WIOMSA & UN-Habitat, 2021). Where blue economy language appears in municipal narratives, it is only incorporated or embedded in the broader economic diversification and climate resilience narratives, rather than articulated as a standalone programme, and so rarely converts into dedicated budgets, governance structures, milestones or performance accountability (ibid). Blue economy-related activities are spread across multiple directorates, such as economic development, environmental management, coastal zone management and planning. Over half the respondents surveyed rated blue economy planning capacity among officials to be moderate (28%) or low (23%).

4.2 Scarcity of city-level blue economy data

At city level, there is a near-total absence of reliable blue economy data. This knowledge vacuum is an obstacle to evidence-based planning, investment attraction, accountability, and monitoring and evaluation. The survey found that the majority of respondents were unable to quantify the contribution of the blue economy to local GDP (73%) or to local employment (62%). Cities need economic baselines in order to build credible investment cases, measure progress against Operation Phakisa targets, allocate resources efficiently (e.g. to training or enterprise development programmes) and report meaningfully to citizens and investors. The Eastern Cape Oceans Economy Satellite Account⁹ demonstrates how systematic measurement can directly improve planning outcomes, and provides the methodological template recommended for replication across all four focal cities.

4.3 Weak or moderate port-city coordination

The governance split between port management and city-level planning instruments may result in spatial tensions, where the port's operational needs clash with city aspirations to develop (for example) waterfront areas and tourism. Port capacity constraints also affect the agility of cities to benefit from African Continental Free Trade Area-facilitated trade growth and increasing seaborne cargo movement. Improved port-city coordination would enable cities to capture the economic multiplier effects of ports and open up opportunities for public-private partnerships and better integration between the port and surrounding land.

9 <https://www.dailymaverick.co.za/article/2025-11-09-eastern-cape-launches-pioneering-oceans-economy-blueprint-for-maritime-growth/>

4.4 Weak intergovernmental and inter-coastal city coordination

The implementation of Operation Phakisa is intended to be shared across the three government spheres, as no single sphere has the mandate, resources and capacity required to deliver the blue economy transformation alone. However, intergovernmental coordination between national, provincial and municipal blue economy initiatives is weak, and blue economy functions are fragmented (e.g., Transnet is responsible for the ports in a city, but cities are responsible for infrastructure, services and land-use planning adjacent to ports). The top five governance and coordination challenges cited by stakeholders in the survey were: poor communication, lack of clear roles, political interference, slow decision-making and lack of coordinating mechanisms. In addition, the lack of a structured coordination mechanism means that cities miss out on opportunities to share lessons and planning on the blue economy.

4.5 Marginalised small-scale fishing communities

Apartheid's spatial planning systematically denied Black and Coloured communities access to and opportunities for the coastal areas. Communities were forcibly removed to the less favourable coastal zones, while the fishing rights and maritime sectors remained in the hands of whites (Sowman, 2006). Today, this legacy is reflected in the significant inequities in access to opportunities, with lower-income coastal residents and workers increasingly excluded because of the progressive commercialisation of public coastal space (Bennett et al., 2019). For instance, the low representation of small-scale fishing and historically displaced communities in Kalk Bay and Hout Bay (Cape Town) and in Summerstrand and Bluewater Bay (Gqeberha). Development of the blue economy that ignores this legacy will only further the historical inequalities (Sowman, 2006; Hauck & Kroese, 2006). The survey confirmed that the barriers to inclusive blue economy participation include not addressing historical inequalities and displacement of traditional coastal communities. The survey also found that community awareness of the blue economy was moderate to low across the four cities, which undermines the effectiveness of public participation processes.

4.5 Strong research assests, weak translation and commercialisation

South Africa has a strong marine research ecosystem that includes the Strategic Resource Mobilisation and Advancement (SRMA) office at the Nelson Mandela University (NMU), the Marine and Antarctic Research Centre for Innovation and Sustainability (MARiS) at UCT, the Faculty of Agrisciences (Division of Aquaculture) at the University of Stellenbosch, CSIR Oceans and Coasts, SANBI, the SA National Space Agency (SANSa), South African Association for Marine Biological Research (SAAMBR) and SAIMI, to mention a few. The challenge is moving from research to commercialisation and policy impact, but SAIMI's capacity-building mandate for the maritime industry offers a pathway for training and stakeholder engagement to enable research application.



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STRATEGIC RECOMMENDATIONS



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To address the findings that emerged from the research, the following strategic recommendations are proposed:

5.1 Explore establishing a dedicated blue economy function within the city

To reap the benefits of the blue economy, cities should explore the establishment of a dedicated blue economy function. Its responsibilities would include:

- Developing a blue economy master plan that is integrated into the municipal IDPs with ring-fenced budget allocations and annual reporting requirements.
- Raising awareness of sustainability challenges that affect the development of a blue economy (e.g., coastal sewage pollution, beach erosion, privatisation of coastal public space).
- Liaising with other city departments to ensure that local spatial development frameworks (SDFs) are aligned with coastal management plans and harbour zones.
- Lobbying for coastal adaptation to be mainstreamed in municipal planning (e.g., integrating coastal climate action plans and SDFs).

5.2 Investigate a SACN-SANSA partnership for monitoring the blue economy

The SACN and SANSA should explore the joint development of a cloud-based Blue Economy Monitoring Observatory. SANSA brings technological expertise at the macro level, while SACN brings the city-level intelligence and knowledge, and both organisations promote the importance of data and evidence-based decision-making. The Observatory would be a platform that combines data from Earth observation, vessel tracking, port operational monitoring and municipal economic indicators, to enable the monitoring of blue economy in coastal cities and the production of regular reports on the blue economy. In addition, all the four coastal cities should have city-level ocean economy satellite accounts, based on the ECSECC template and groundbreaking method of measurement.

To support cities, the SACN should develop a standardised methodology which would allow for cross-city comparison and national aggregation.



International comparative examples

Portugal's Ocean Satellite Account for Portugal tracks 14 ocean sectors across six stages of the value chain (DGMP, 2021). The methodology used offers a template for city-level ocean economy satellite accounts, leveraging on the existing Eastern Cape example.

5.3 Develop port-city model agreement

A port-city model agreement or port-city interface protocol would enable the city to influence and align its planning to planned port development. It would provide a basis for negotiation between Transnet and cities, with the aim of sharing economic benefits and mitigating environmental challenges and land-use conflicts.



International comparative examples

Rotterdam offers an example of how the port-city interface can be a strategic asset for building “a cluster of innovative manufacturing start-ups and scale-ups” (Stam, 2024). The World Bank Group (2025: 3) has also developed a toolkit to “assist port authorities and other stakeholders in the joint development of the port-city interface”.

5.4 Establish inter-city and intergovernmental coordination mechanisms

The SACN should assess interest among cities, relevant national departments and potential donors for the establishment of a Coastal Cities Blue Economy Forum, with the intention of agreeing on terms of reference and identifying budget sources. Such a Forum would provide a platform for lobbying other government spheres and for sharing knowledge and innovative models that could be replicated in other cities. For instance, the WILDTRUST Blue Port project is a new model of community-engaged marine environmental management.



International comparative examples

Norway's governance model integrates the national maritime strategy with the marine spatial planning authority at a municipal level. Norwegian coastal municipalities (kystkommuner) hold dedicated marine spatial planning mandates under the Planning and Building Act. This creates a dual mandate that enables ports, aquaculture, and offshore services to be planned comprehensively alongside urban development and habitat protection (Dyrset, 2025). It is the model most directly transferable to South Africa's IDP-SDF system.

5.5 Co-design a blue justice framework

Blue justice is a precondition, not an add-on because communities excluded from governance become communities that resist development. The SACN should co-design with the cities a minimum principles framework and city-specific charters with small-scale fishers, women, youth, traditional leadership and affected coastal communities. Such a charter could include mandated community impact assessment; adoption, grievance and monitoring mechanisms; community benefit-sharing mechanisms for blue economy projects; women and youth equity targets; and the establishment of community blue economy trusts.

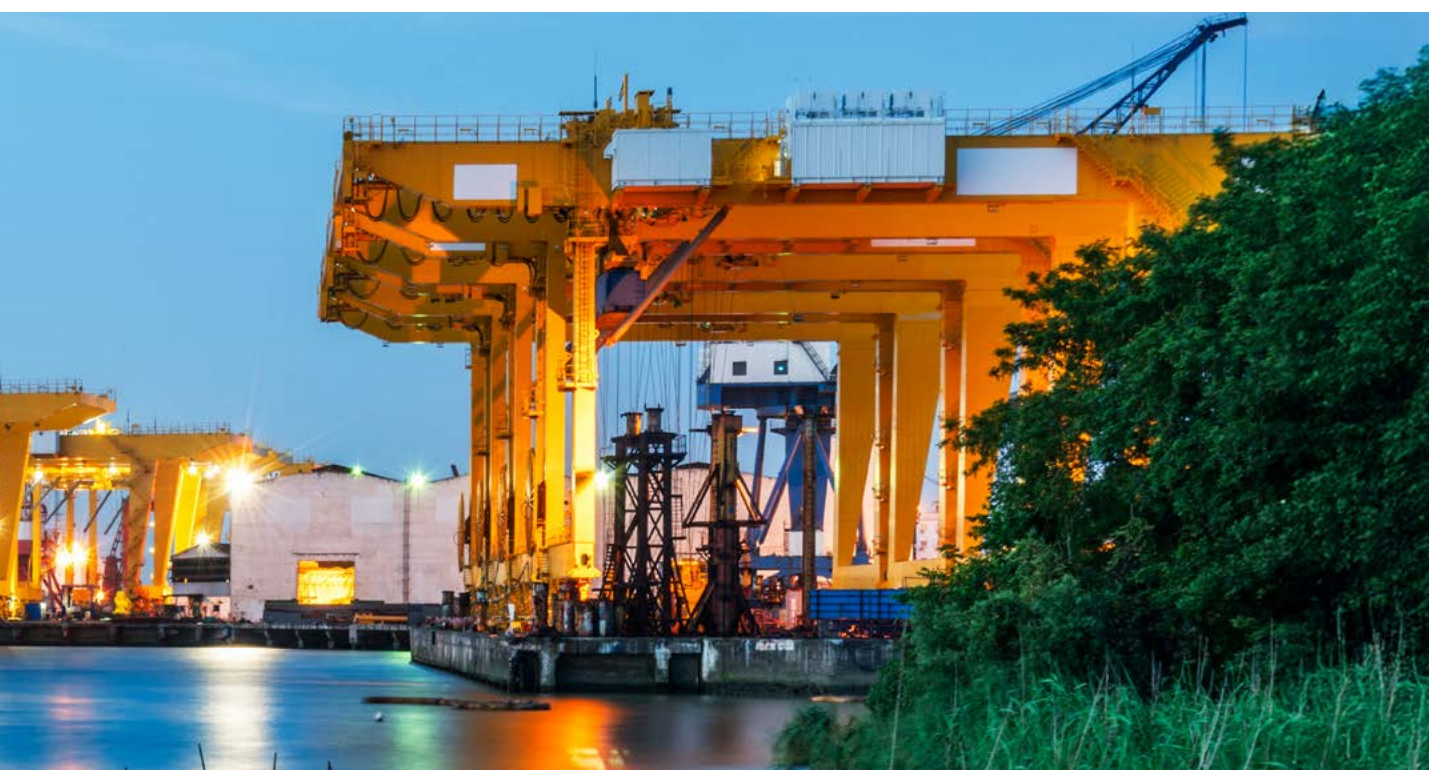


International comparative examples

Portugal and New Zealand offer examples of incorporating blue justice into ocean economy strategies. In Portugal, the fisheries community transition support programme reskills, protects and supports communities that are affected by industrial maritime development, while Māori and communities are explicit partners in New Zealand's Aquaculture Strategy 2025–2030, which includes providing “Māori with assets representative of 20 percent of all new aquaculture space in the territorial sea” (New Zealand Government, 2025: 10).

5.6 Strengthen collaboration between industry, universities and government

In Gqeberha, NMU has a dedicated Ocean Sciences Campus where the ICMR and SAIMI are located, enabling the coordination of maritime education, training and research. A Marine Research and Innovation Precinct should be developed that brings together NMU ICMR, SAIMI, and marine biotech enterprises, creating a physical, technological, and intellectual nexus to help address the research-to-commercialisation gap by sharing facilities and supporting marine enterprise development. In addition, the SACN should seek collaboration with the four cities and development finance institutes (such as the Development Bank of Southern Africa) to develop a Coastal City Blue Investment Prospectus that identifies bankable blue economy projects in the cities.



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CONCLUSION

South Africa is well positioned to benefit from the blue economy, being flanked by two oceans that are rich in marine resources and located on strategic shipping routes, with eight commercial ports. The country's approach to the blue economy is aligned to international and continental agreements and finds expression in Operation Phakisa, which was launched in 2014 and identifies six priority sectors. Building on this foundation, the DFFE is currently finalising an Ocean Economy Master Plan, to guide the future development of the blue economy.

Four coastal cities – Nelson Mandela Bay, Buffalo City, Cape Town and eThekweni – are home to five of South Africa's eight commercial ports through which 98% of the country's international trade passes. To understand how these cities can harness the benefits of the blue economy, the SACN conducted research, through a desktop study, which analysed international, national and municipal documents, and a survey of 60 stakeholders from across sectors in the four cities.

The research found that, while cities recognise the potential of the blue economy, they do not have a dedicated blue economy function and lack city-level data on the blue economy. Coordination is weak, between ports and cities, as well as among coastal cities. In addition, Operation Phakisa is intended to be implemented across the three government spheres, but intergovernmental coordination of blue economy initiatives is weak and fragmented. Furthermore, key stakeholders – the small-scale fishing communities – continue to be marginalised and have low awareness of the blue economy potential. Nevertheless, the coastal cities, in particular Gqeberha and Cape Town, have a strong marine research foundation. The research also identified additional potential growth sectors in the blue economy that cities could explore, including blue carbon, marine biotechnology and green hydrogen.

In light of these findings, the following recommendations are proposed:

1. Develop a city-based blue economy strategic framework.
2. Explore establishing a dedicated blue economy function within the city.
3. Investigate a SACN-SANSA partnership for monitoring the blue economy.
4. Develop port-city model agreement
5. Establish inter-city and intergovernmental coordination mechanisms
6. Strengthen collaboration between industry, universities and government
7. Create a standard blue justice charter for municipalities



The G20 legacy of 2025, the global green energy transition, which creates new demand for South Africa's renewable export capacity, and Operation Phakisa's decade of institutional foundation-building, together constitute a convergence of enabling conditions for blue economy transformation. South African coastal cities need to mobilise the institutional will, coordination architecture and financial resources required to grasp this window of opportunity for developing the blue economy.

The research and stakeholder survey identified that Gqeberha should be the pilot site to test an integrated, replicable Blue Economy Strategic Framework at city scale. Its success would provide the proof of concept that unlocks national investment in the model's replication across Cape Town, eThekweni, and Buffalo City.

The foundation has been laid, and the stakeholder consensus is clear. What is required now is not more analysis but committed, funded implementation. To support this, in the coming year, the SACN will develop a strategic framework to guide coastal cities in engaging with and benefiting from the blue economy. Such a framework will cover governance and policy integration (including aligning city and marine spatial plans), port/city collaborative governance (learning from international examples, such as Rotterdam), inclusive LED (expanding SEZ and identifying core focus areas), environmental management (exploring climate resilience, nature-based solutions), as well as community and innovation (developing a blue justice charter and community participation).



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