THE PATNA REPORT

THE IMPACTS OF IMO'S SHIP DECARBONISATION STRATEGY ON AFRICAN MEMBER STATES.

A survey of key representatives of 25 African IMO member states, including regional and national organisations, at the Decarbonisation Workshop held in Dakar, Senegal, on the 5th of August 2025.

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Introduction

This report is proudly presented as part of **The LEAP Project Series: Leading Effective Afrocentric Participation** in the IMO (www.thepatna.org, contact@thepatna.org). The LEAP Project Series is dedicated to empowering African nations with rigorous, research-based strategies and fostering unified continental positions to effectively advocate for equitable maritime policies within the International Maritime Organisation (IMO).

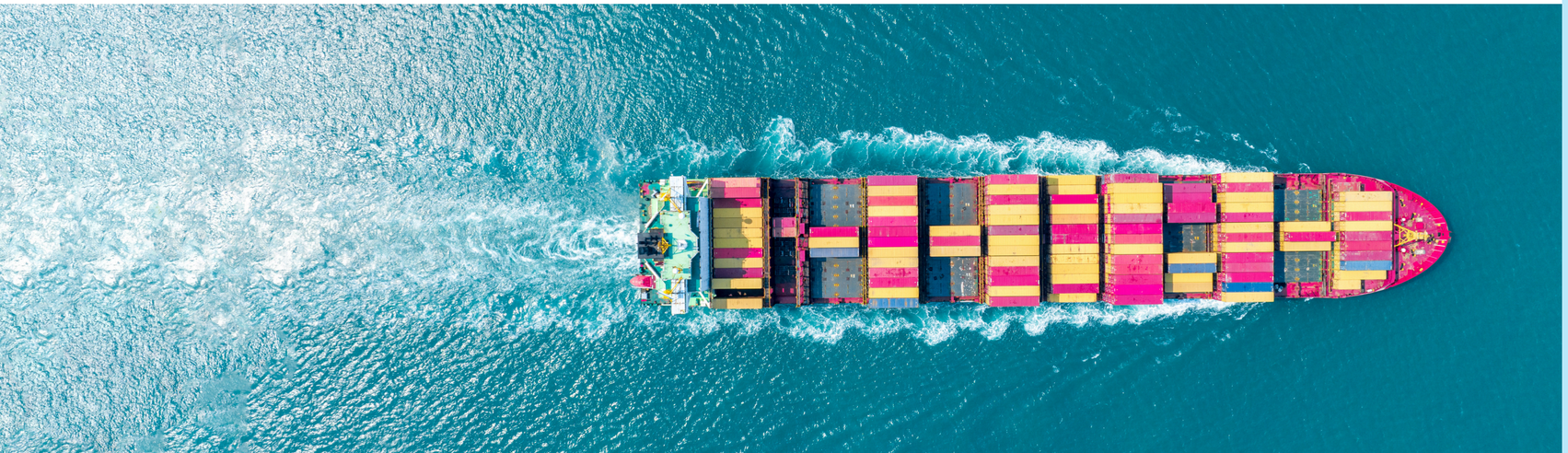
This report provides a comprehensive analysis of survey data and key insights derived from a Mentimeter poll conducted during the Decarbonisation Workshop held in **Dakar, Senegal, on August 5, 2025**. The poll gathered critical perspectives from key representatives across 25 African IMO member states, including participants from regional and national organisations, offering a unique snapshot of the continent's priorities and concerns regarding the **IMO's Net-Zero Framework**.



EXECUTIVE SUMMARY

A Survey on the Impacts of IMO’s Ship Decarbonisation Strategy (Dakar Workshop, 2025)

This survey analysis reveals the perspectivces of key maritime stakeholders on the impact of IMO’s ship decarconisation strategy, based on responses from 40+ representatives from 25 countries spanning MOWCA (Maritime Organisation of West and Central Africa), MOESNA (Maritime Organisation of Eastern and Southern Africa), and landlocked and land-linked nations. The data collected during the Dakar Maritime Decarbonisation Workshop in Senegal reveals that while stakeholders maintain optimistic visions of unity, development, and technological advancement, they simultaneously have deep concerns about unjust transition processes and overwhelming infrastructure deficits.



Key Findings:

- Food/fuel cost increases and infrastructure gaps emerge as equally pressing concerns (15 responses each)
- Local shipping operators and small island states face greatest transition risks, emphasizing economic constraints over demographic factors
- Aspirations center on collaborative opportunities and development, while fears focus on injustice, inequity, and exclusion
- 72% respondents believe ports are unprepared for clean vessels, threatening Africa's maritime trade integration
- 50% prioritize infrastructure support in IMO negotiations, demonstrating focused diplomatic approach
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PARTICIPATING COUNTRIES

25 African IMO Member State Participants

Respondents are critical maritime stakeholders from 25 participating countries, representing MOWCA (Maritime Organisation of West and Central Africa), MOESNA (Maritime Organisation of Eastern and Southern Africa), land-linked nations, and islands.

The participating countries were Angola, Benin, Burkina Faso, Cameroun, Chad, Congo, Congo (Democratic Republic of), Côte d'Ivoire, Equatorial Guinea, Gabon, Gambia, Ghana, Guinea, Kenya, Liberia, Mali, Mauritania, Mozambique, Nigeria, Senegal, Sierra Leone, Seychelles, South Africa, Tanzania, and Togo.

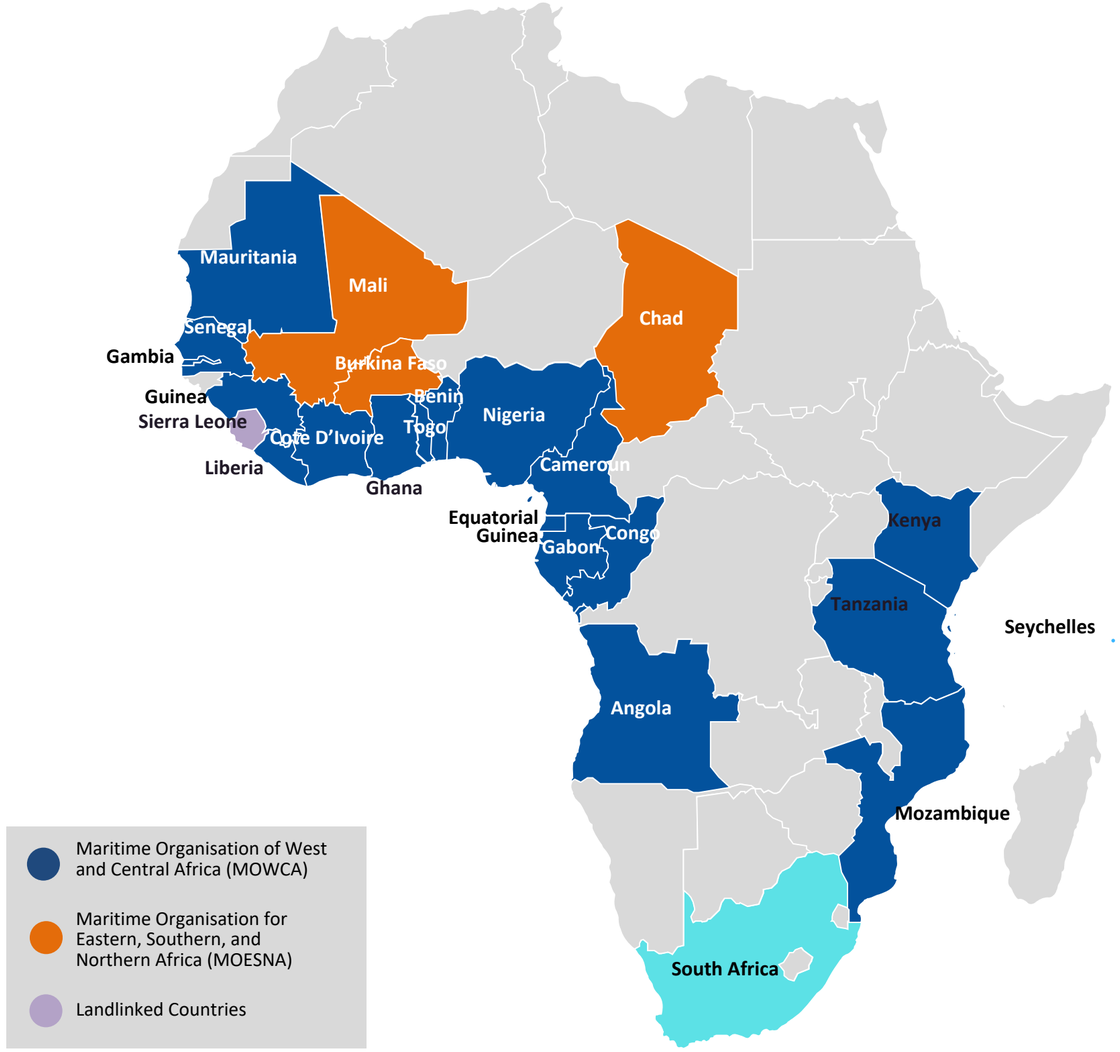


Figure 1: African Member State Stakeholder Survey Participants

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RISKS OF MARITIME DECARBONIZATION FOR AFRICAN ECONOMIES

Twin Maritime Transition Threats: Rising Costs and Infrastructure Deficits.

The survey reveals African stakeholders are equally concerned about two fundamental challenges that could derail the continent's maritime transition.

Increased food and fuel costs, alongside infrastructure gaps in ports and energy systems, each received 15 responses, representing the most pressing risks to African economies.

This dual concern reflects Africa's position as a net importer of essential commodities through maritime routes, where any shipping cost increases translate directly to consumer burden, particularly affecting vulnerable populations.

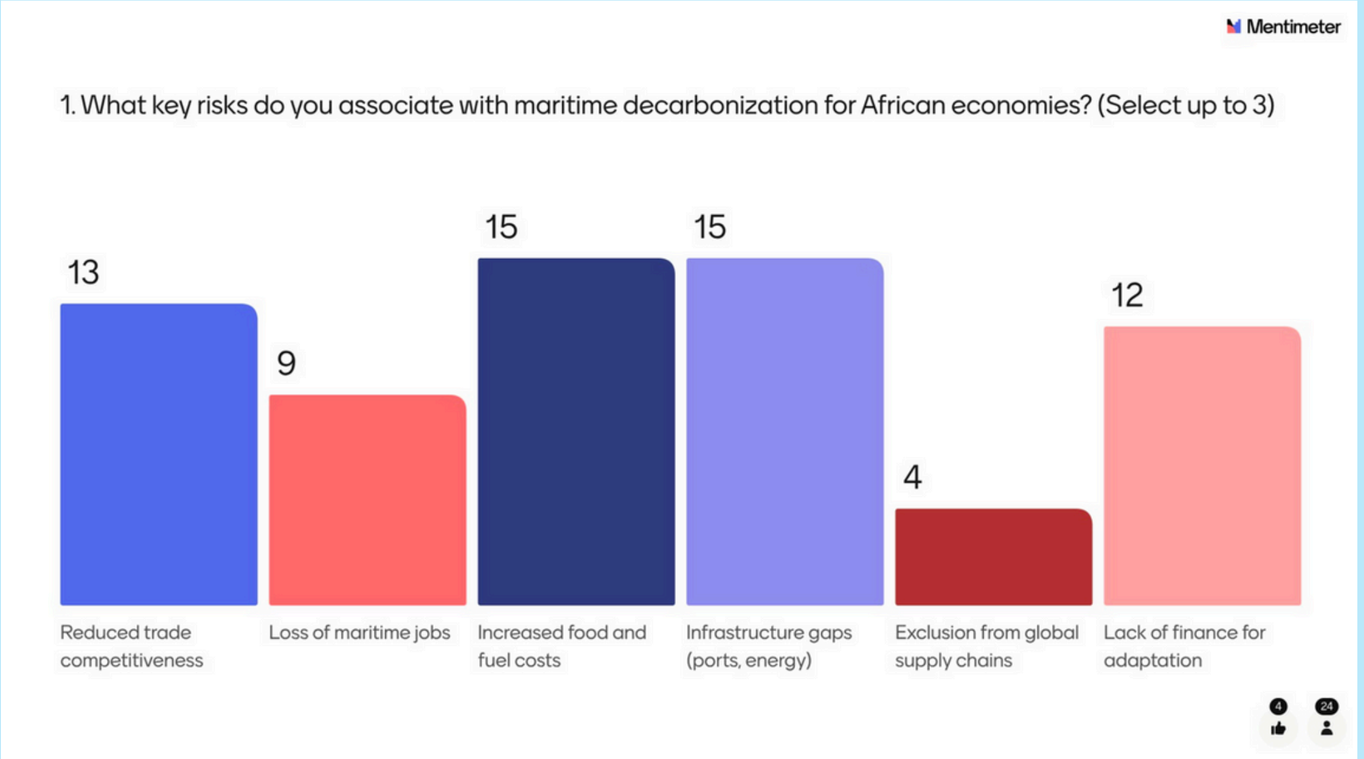


Figure 2: Top Key Risks of Maritime Decarbonization for African Economies (Dakar Workshop, 2025)

GROUPS MOST AT RISK OF BEING LEFT BEHIND

Local Maritime Operators Most Vulnerable in Africa's Green Transition

African stakeholders have identified a clear hierarchy of vulnerability, with local shipping operators emerging as the most at-risk group in the maritime decarbonization transition.

This ranking reflects economic realities: local operators lack the capital resources and technological capacity needed to retrofit vessels, adopt new fuel systems, or compete with larger international shipping companies that can more easily absorb transition costs.

Small island states rank second, emphasizing their complete dependence on maritime connectivity and limited economic alternatives if shipping becomes more expensive or less reliable.

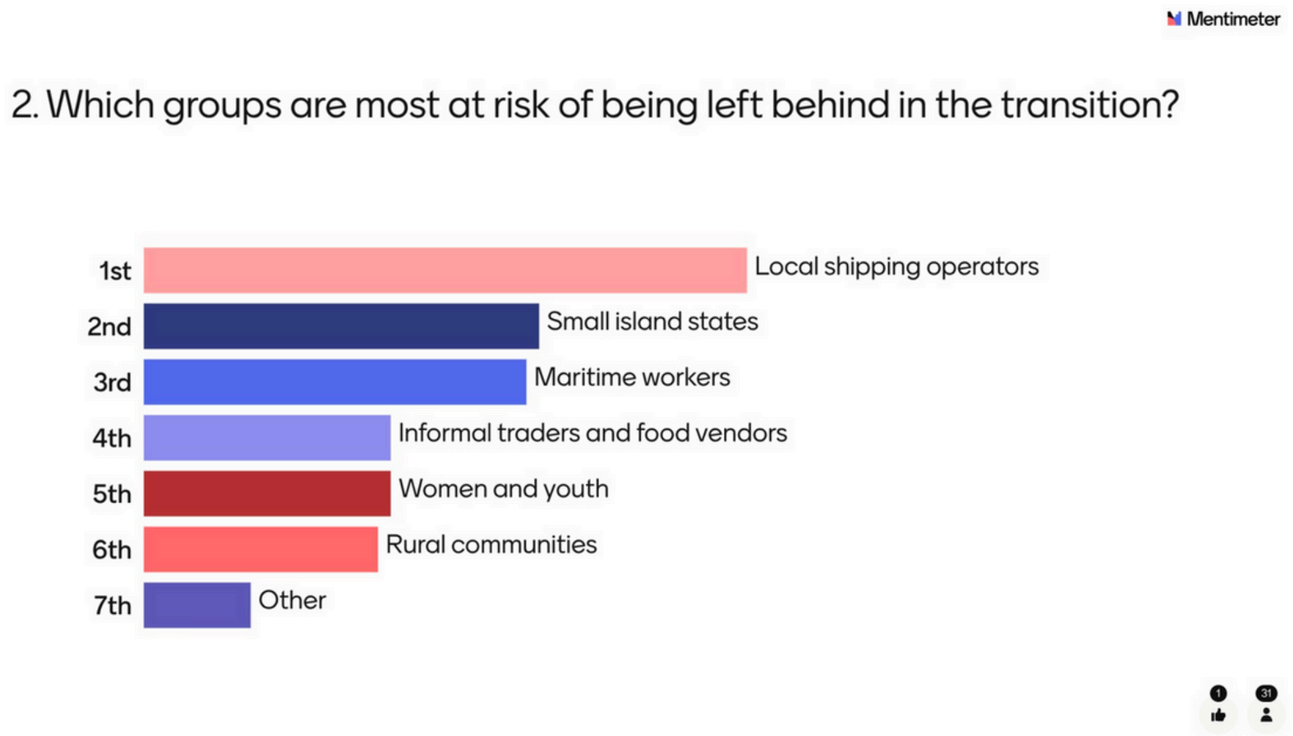


Figure 3: Top Ranked Groups Most at Risk of Being Left Behind (Dakar Workshop, 2025)

BIGGEST HOPES FOR AFRICA IN MARITIME TRANSITION

African Stakeholders Envision Opportunities, Unity, and Inclusion

The word cloud reveals an optimistic vision among African stakeholders, with "opportunities," "unity," and "inclusivity" dominating responses about the continent's maritime transition prospects.

This positive outlook suggests African leaders and experts view decarbonization as a catalyst for continental advancement and technology development.

The prominence of collaborative terms such as "collaboration", "just", and "equity", indicates strong belief in collective African action and fairness as essential success factors.

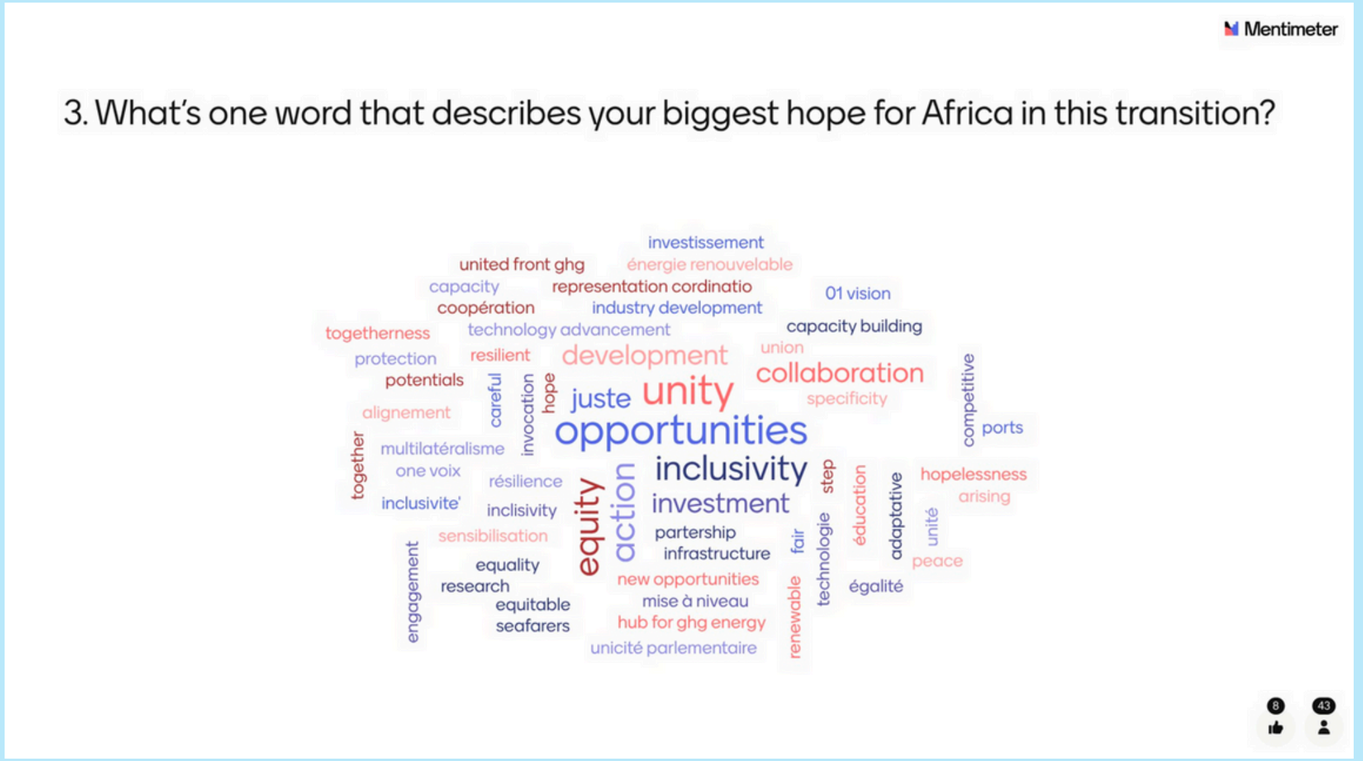


Figure 4: A Word Cloud of Biggest Hopes for Africa in Maritime Transition (Dakar Workshop, 2025)

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BIGGEST CONCERNS FOR AFRICA IN MARITIME TRANSITION

Justice and Equity Concerns Dominate Transition Fears

The fear word cloud presents a contrast to hopeful aspirations, with "injustice," "inequity," and "unfair transition" dominating stakeholder concerns about maritime decarbonization.

This indicates that African fears center on the risk of unjust implementation that could perpetuate or worsen existing global inequalities.

These justice-focused terms suggests deep skepticism about whether developed nations and international organizations will ensure fair treatment for African countries in maritime policy development and implementation.



Figure 5: A Word Cloud of Biggest Concerns for Africa in Maritime Transition (Dakar Workshop, 2025)

AFRICAN PORT READINESS FOR CLEAN VESSELS

African Ports Unprepared for Clean Maritime Revolution

The assessment uncovers a reality about Africa's maritime infrastructure, with 28 of 39 respondents (72%) indicating African ports are "not prepared" for low or zero-emission vessels powered by hydrogen, ammonia, or other clean fuels.

This massive preparedness gap encompasses critical infrastructure deficits including specialized fuel storage facilities, advanced handling equipment, safety systems, and trained personnel necessary for next-generation maritime technologies.

Only 1 respondent (2.6%) believes ports are "fully prepared," while 8 (20.5%) see "somewhat prepared" infrastructure—together representing less than 25% showing meaningful readiness.

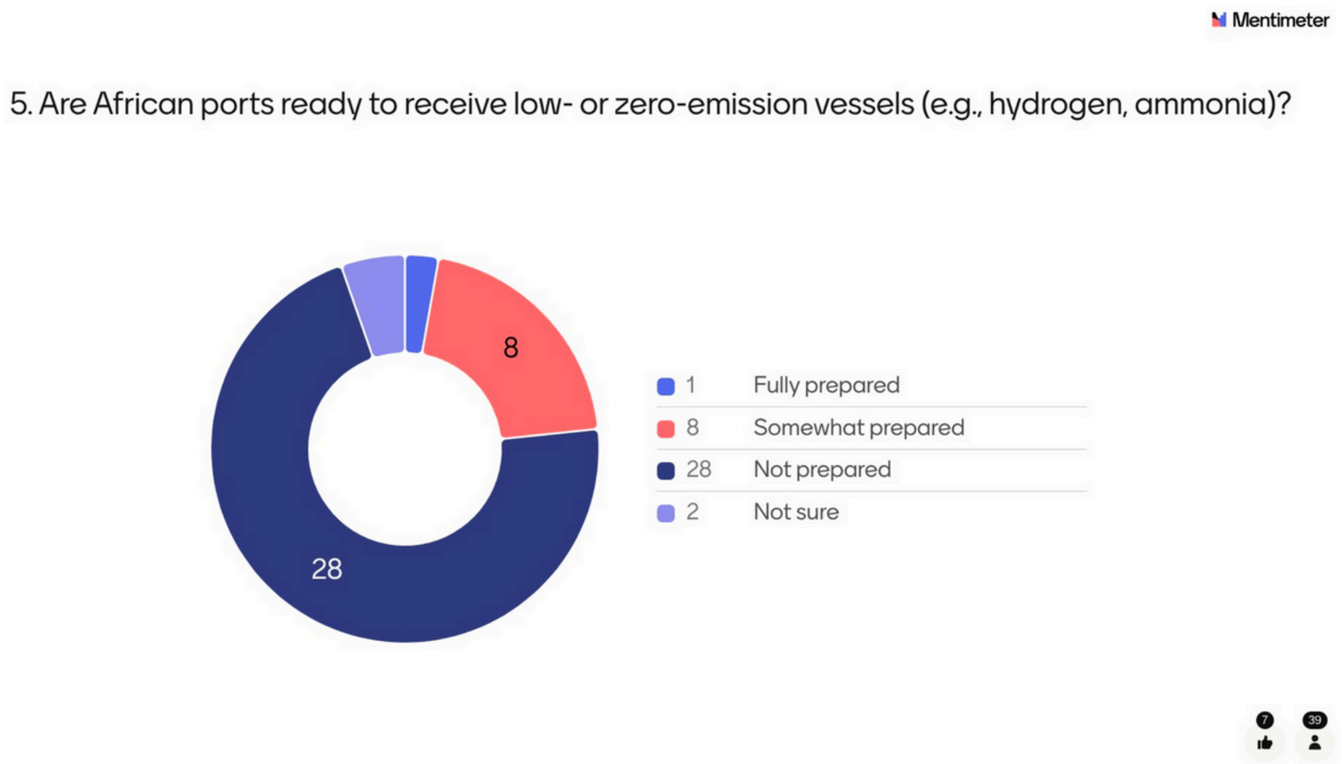


Figure 6: A Stakeholders' Perspective of African Port Readiness for Clean Vessels (Dakar Workshop, 2025)

AFRICA'S TOP IMO NEGOTIATING PRIORITIES

Port Infrastructure Support Emerges as Africa's Negotiation Priority.

African stakeholders have identified a decisive negotiating strategy for International Maritime Organization discussions, with "Support for port infrastructure and technology" receiving 21 of 42 responses (50%), making it the overwhelming diplomatic priority.

This infrastructure-first approach reflects strategic recognition that without adequate port facilities, fuel storage systems, and technological capacity, all other transition support becomes irrelevant.

The preference demonstrates sophisticated understanding of foundational requirements for successful maritime decarbonization participation.

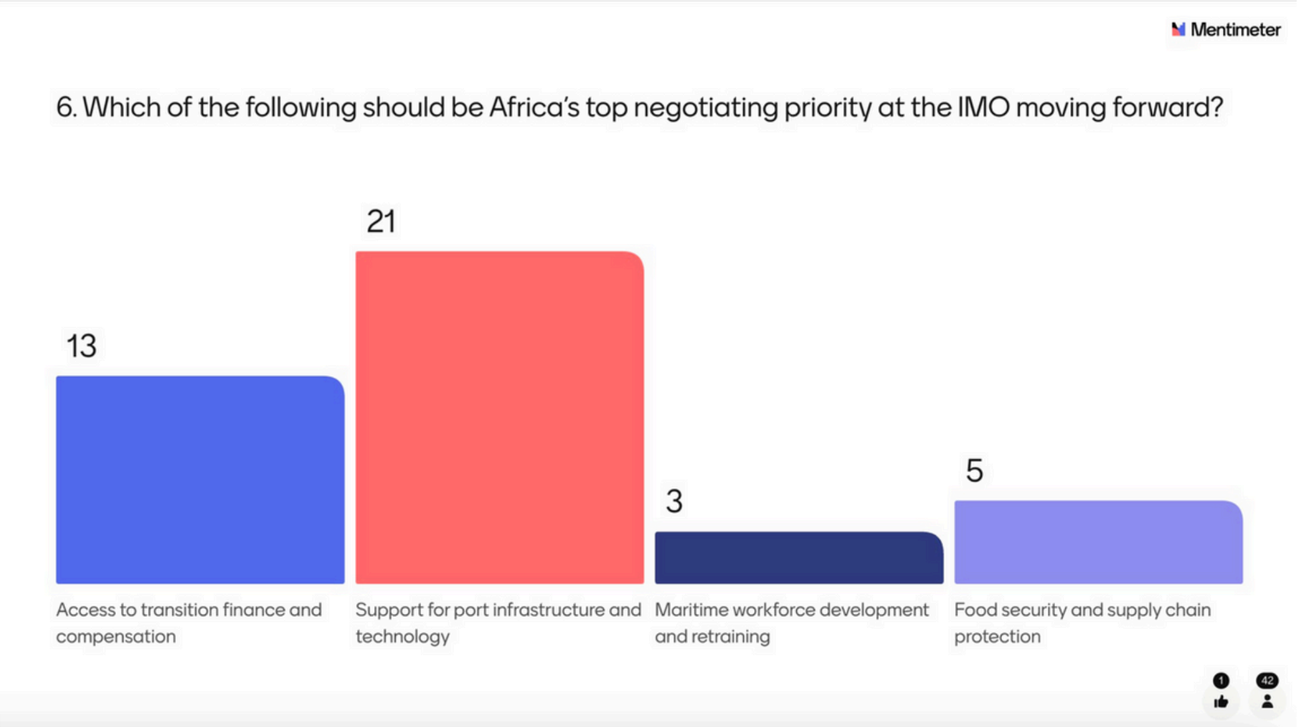


Figure 7: Bar Chart Showing Africa's Top IMO Negotiating Priorities (Dakar Workshop, 2025)

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SUMMARY OF KEY INSIGHTS

Key Insights from the Analysis of Maritime Stakeholder Survey.

1. Risk

African stakeholders equally prioritize cost containment and infrastructure development, viewing both as existential threats requiring immediate attention and coordinated policy responses.

2. Vulnerability

Economic constraints outweigh demographic factors in vulnerability rankings, demanding targeted support for local operators and small island states most at risk.

3. Hopes

African stakeholders frame maritime transition as collaborative opportunity for unity and development, emphasizing equity and technological advancement over challenges.

4. Concerns

African stakeholders fear unjust transition processes more than technical challenges, prioritizing procedural fairness and inclusive governance over financial support alone.

5. Port Readiness

Massive infrastructure investment urgently needed as three-quarters of African ports lack readiness for clean vessel technologies, risking trade isolation.

6. Priorities

African diplomatic strategy should focus heavily on infrastructure and technology transfer, with stakeholders viewing this as foundational to all other benefits.

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Thank You.

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