

Potentials of EU Sustainable Fisheries Partnership Agreements and development cooperation for the sustainable development of local fisheries sectors



Final Project Report

Assignment for the German Federal Ministry for Economic Cooperation and Development (BMZ)

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On behalf of



Federal Ministry
for Economic Cooperation
and Development

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List of abbreviations and acronyms

AC	Advisory Committee
ACP	African Caribbean and Pacific
ADEPA	<i>The Association ouest-africaine pour le Développement de la Pêche Artisanale</i>
AMPA	Malagasy Fisheries and Aquaculture Agency (Madagascar)
BMZ	Federal Ministry for Economic Cooperation and Development (<i>Bundesministerium für wirtschaftliche Zusammenarbeit und Entwicklung</i>)
c.a.....	<i>circa</i> = about
CAOPA.....	<i>Confédération Africaine des Organisations de la Pêche Artisanale</i>
CFFA.....	Coalition for Fair Fisheries Agreements
CFP.....	Common Fisheries Policy
CS.....	civil society
DG INTPA.....	Directorate General of International Partnerships
DG MARE.....	Directorate General of Maritime Affairs and Fisheries
EBA.....	Everything But Arms
ECOWAS.....	Economic Community of West African States
EEAS.....	European external action service
EEZ.....	exclusive economic zone
e.g.....	<i>exempli gratia</i> = for example
EU.....	European Union
EUD.....	European Union Delegation
FA.....	<i>fisheries attaché</i>
FAD.....	fish aggregating device
FAO.....	Food and Agriculture Organisation (of the United Nations)
FPA.....	Fisheries Partnership Agreement
GIZ.....	<i>Deutsche Gesellschaft für Internationale Zusammenarbeit</i> (GIZ) GmbH
GSP.....	generalised system of preferences
IMO.....	International Maritime Organisation
IUU.....	illegal, unreported, and unregulated
JC.....	Joint Committee
KfW.....	<i>Kreditanstalt für Wiederaufbau</i> (German Development Bank)
LDAC.....	Long Distance Advisory Council
MPEB.....	Ministry of Fisheries and the Blue Economy (Madagascar)
NaFAA.....	National Fisheries and Aquaculture Authority
NGO.....	non-governmental organisation
OCUP.....	Observateur Commun Unique et Permanent
PAN.....	<i>Port Autonome de Nouadhibou</i> (Mauritania)
PFA.....	Pelagic Freezer Trawler Association
PONSAFAG..	Platform of Non-State Actors in Fisheries and Aquaculture of the Gambia
PS.....	private sector
PTC.....	partner third country
RFMO.....	regional fisheries management organisation
RSW.....	refrigerated sea water
SMART.....	Specific, Measurable, Agreed, Realistic, and Timebound

SNDP..... *Société Nationale de Distribution de Poisson* (Mauritania)
SPS sanitary and phytosanitary
SFPA Sustainable Fisheries Partnership Agreement
STCW-F Standards of training, certification and watchkeeping for fishing vessel
 personnel
TAC Total Allowable Catch
WIO West Indian Ocean
WWF..... World Wildlife Fund

Executive summary

Background and purpose of the study

1. This report was prepared by **Poseidon Aquatic Resource Management Limited**, for the German Federal Ministry for Economic Cooperation and Development (**BMZ**).¹ **This document is the final project report** resulting from work completed between early 2022 and the end of 2023.
2. **Sustainable Fisheries Partnership Agreements (SFPAs)**² are international agreements, supported by implementing Protocols, concluded between the European Union (EU) and partner third countries (PTCs) for the purpose of obtaining access for EU vessels to fish resources within the PTCs' waters. The EU provides financial contributions through two components: an access component defining the technical and financial conditions governing access by EU fishing vessels to the waters of the PTCs, and the sectoral support component to support implementation of the fisheries policy of the PTC. There are currently 11 SFPAs between the EU and African PTCs with active Protocols. When SFPAs are in force but with no Protocol, they are said to be dormant.
3. **The geographical scope of this research study** was the African continent, and **the purpose of this research study** was to explore three research questions, mostly on SFPAs having been active since 2015:
 - i. How to ensure increased levels of benefits from SFPAs from EU fleet activities in African countries, in terms of fish landings and employment, and contributions to food security and national socio-economic benefits?
 - ii. How to design and implement the sectoral support component of SFPAs most effectively, in particular to support small-scale fisheries, gender equity and food security?
 - iii. How to ensure that complementary activities by donors/development partners can contribute to maximising the benefits of the SFPAs?

Methodology

4. The **methodology included**:
 - a literature review.
 - remote consultations with stakeholders in EU and African countries with responsibility for the implementation of SFPAs (e.g. EU institutions, EU Member State (MS) managing authorities, and PTC governments), those impacted by SFPAs (EU and PTC private sector fishing-fish trading companies and organisations representing small- and large scale fishing / fish trading actors), and those having a stated interest in SFPAs (e.g. civil society).
 - in-country work in focus countries: The Gambia, Mauritania, and Madagascar. The work included three short missions by an international consultant to each country supported by a local consultant, concluding with national consultation workshops. Work in a fourth country, Senegal, was conducted by a national consultant and did not include a national workshop.

¹ *Bundesministerium für wirtschaftliche Zusammenarbeit und Entwicklung*

² References to SFPAs in this report relate to both SFPAs and Fisheries Partnership Agreements (FPAs) that are in force with some partner third countries. FPAs were signed before 2012/2013.

5. An **Advisory Committee** comprised of appropriate and interested parties was established at the start of the assignment and provided guidance and input at various stages. A well-attended **stakeholder workshop** held in Brussels in October 2023 with participants comprising many members of the Long-Distance Advisory Council (LDAC), provided the authors with an opportunity to present and discuss draft findings, conclusions and recommendations. Comments from the Brussels workshop have been incorporated into this report.
6. **Methodological challenges** during the study included:
 - difficulties in generating additional findings from the literature review to those presented in a horizontal evaluation of SPFAs published by the EU in 2023 given the comprehensive nature of that evaluation.
 - low (but not unexpected) response rates to the remote consultations.
 - the limited budget available to spend time in the focus countries reducing the possibility for detailed primary investigations.
7. Nevertheless, the **added value of the methodology** was that it generated new learning over and above the contents of the horizontal evaluation because of:
 - a focus on African countries only, allowing for Africa-specific data and findings.
 - a specific focus on small scale local fisheries, food security and gender issues in the PTCs, in line with priorities of BMZ as the funder.
 - in-country work which enabled a level of understanding not generated by the horizontal evaluation, and the preparation of country-level reports for the focus countries.
 - momentum with stakeholders in the focus countries around country-specific conclusions and recommendations through national level workshops.
 - recommendations which are tailored to the EU, African PTCs, and donors. The recommendations in this report for the EU and African governments can be considered by them but should also be useful for civil society and donors in terms of their advocacy work. This report also includes recommendations directed specifically at donors.
8. **Country-specific findings, conclusions and recommendations for the focus countries are presented in the country-specific reports. Generalised conclusions and recommendations are presented below.**

Findings and conclusions about linkages from landings of EU catches and use by EU vessels of ports in PTCs

9. **Ensuring that catches by EU vessels contribute to food security in African countries is an indirect objective of SFPAs.** From the EU perspective the SFPAs are intended to contribute supplies to the EU market and local markets by mutual benefits through a sustainable exploitation of fisheries resources by EU vessels that are authorised by PTCs to catch in their waters. While the underlying premise of the first research question of this assignment was that increased supplies of EU catches to African PTCs would be desirable from a food security perspective, **many stakeholders questioned/doubted whether this would in fact be either necessarily beneficial (because of potentially negative impacts on local fishers) or possible.** The reasons for this view largely stem from the findings and conclusions presented in the paragraphs below.

10. **Protocols already recognise different port conditions and onshore processing establishments** present in PTCs and do not include mandated provisions to land where such provisions would/could not be complied with by EU operators or would deter utilisation of fishing opportunities.
11. **Landings in the ports of PTCs do not necessarily mean that products landed will contribute to supplying the local markets** (contributing to food security) **or be available to local processing industries** (contributing to value added and employment) if product is exported without being processed. Product that is landed and processed may also be exported and so not available for local consumption. And catch, such as small pelagics or tuna, that is transshipped (i.e. not a landing) creates no/little onshore economic benefit to the African PTCs over and above transshipment fees (but does allow them to engage in inspection of transshipments to ensure compliance with conservation and management measures).
12. **Protocol provisions relate to landings only, not to the sale of catch to local industries or on the local market.** There are no SFPAs mandating sales to local industries (except for in-kind contributions), for the reason that it would distort commercial relationships.
13. **The African countries with SFPAs benefitting the most from the linkages between EU vessels and ports and processing facilities in PTCs are Morocco³ and Mauritania (for small pelagics, demersals and crustaceans), and Cabo Verde, Senegal and Côte d'Ivoire for tuna in the Atlantic Ocean, and Madagascar, Mauritius and Seychelles (all for tuna) in the Indian Ocean.** All these countries have port infrastructure that is capable of servicing large-scale fishing vessels (and/or are well-placed geographically to handle product flows to Europe and/or have a SFPAs which mandates landings), although some are more developed / operational than others. In contrast, the Gambia, Gabon, Guinea Bissau, Liberia, São Tomé and Príncipe in the Atlantic, and Comoros⁴ in the Indian Ocean, have had little or no linkages with the EU fleet largely due to their poor port infrastructure and services and absence of processing facilities.
14. **It is not necessary for African countries to have a SFPAs to benefit from EU catches** made under them. Ghana and South Africa for example do not have an SFPAs with the EU, but receive part of EU tuna catches made in the region through SFPAs, with their ports and onshore processing facilities deriving benefits.
15. **Around a total of 7 500 tonnes of catch made under SFPAs is destined for direct final sale in the same PTC having that SFPAs** (c.a. 5-6 000 tonnes of tuna bycatch not sold to canneries, and around 2 000 tonnes of small pelagics in Mauritania). An estimated 27 000 tonnes of EU catches annually from SFPAs supply domestic markets in all the African PTCs.
16. **More than 90% of all catches made under SFPAs between the EU and African PTCs are destined for the EU market.** However considerable volumes (c.a. 200 000 tonnes) of small pelagics caught in Mauritania and Morocco by EU vessels fishing under

³ The Morocco SFPAs is now dormant. Its last implementing Protocol expired on 17 July 2023.

⁴ The Protocol to the SFPAs with Comoros ended on 31 December 2016 and the SFPAs was denounced by the EU on 3 January 2019, meaning the SFPAs is not in force anymore. The denunciation follows the inclusion by the EU of Comoros on the list of non-cooperating third countries in the fight against illegal, unreported and unregulated (IUU) fishing.

the SFPAs and in European waters are destined for sale in other African countries without an SFPA.

17. **Sale of bycatch (at current levels, or if increased in the future) from EU vessels (e.g. demersal trawl bycatch, tuna bycatch) on local markets is generally assessed as positive** in terms of making a contribution to local food security and employment of local traders and processors (many of whom tend to be women). However, it should be noted that while not quantified or fully understood during this assignment, **there may be risks of such landings** distorting local markets.
18. **Critical factors for EU vessels impacting their interest and ability to land catch in specific ports of PTCs** are:
 - the location of catches and how close fishing grounds are at different times of the year to different ports.
 - the opportunities and abilities of PTCs to export fish to the EU market based on their compliance with EU requirements on fish hygiene/food safety and IUU fishing, and/or tariff/quota arrangements.
 - the status and condition of port infrastructure and services e.g. quays, lack of congestion to allow fast turnaround times, bunkering, quality, timeliness and price of port services including vessel maintenance and repair.
19. **Additional factors for EU vessels also impacting their interest to sell catch in specific ports of PTCs** are:
 - the presence of onshore processing industries with the capacity to process part of their landings, and which pay within a reasonable time and provide for rapid weighing by species.
 - the prices paid for fish in PTCs as compared to in other ports and/or by other international buyers.
20. Some longline, demersal and small pelagic catches are landed in the Canary Islands due to processing and port infrastructure, costs, and market links in Las Palmas, which are hard for African PTCs to compete with. For tuna purse seine catches, as well as for other catches of longline tuna, demersals and small pelagics, **EU catches are already generally landed or transshipped in ports in African PTCs based on established relationships, competitive advantages of different ports and trade flows to end markets**. While African PTCs which do not benefit from landings of EU catches may have an interest in attracting greater landings, **disrupting historical patterns of landings and market dynamics could require very significant investments in port and processing infrastructure and be difficult to achieve**.
21. Because total volumes of EU catches caught under SFPAs are determined/limited by resource availability (along with the fishing opportunities provided), **without an increase in overall catches any increase in total EU catches landed, processed or transhipped in one African PTC would likely be at the expense of another African PTC, displacing the benefits between African PTCs without generating any net additional benefits** to the continent.
22. **Improved resource availability for species caught by EU vessels could/would result in greater catches and therefore potentially greater landings and linkages** between EU vessels and African PTCs in terms of contributions to food security, value-added and employment in PTCs.

23. **Existing linkages between EU vessels and African PTCs are being threatened** in some countries by an increased presence of other foreign flagged (or beneficially owned) vessels from non-EU countries.

Findings and conclusions about linkages from employment of nationals from PTCs on EU vessels

24. There are generally no **difficulties in identifying and finding properly trained and willing seamen from** Morocco, Mauritania, Senegal, and Côte d'Ivoire to work on EU vessels, but in other countries trained and willing crew are often lacking. A lack of training institutes or funding for the training of crew from PTCs may be hindering employment for nationals from PTCs on EU vessels. **Increased training and certification aligned with the international standards of the IMO** of potential crew from African PTCs **may therefore be beneficial**.
25. **Unless overall employment of ACP nationals on EU vessels increases**, efforts to train crew in specific African PTCs may generate employment for them at the expense of other African PTC nationals. **This would cause a displacement of employment opportunities rather than an overall increase but would result in more equitable distribution of the employment created between PTCs**.
26. Given that Protocols specify crewing requirements by nationality, **a change in the proportion/number of crew required from ACP countries in the Protocols may generate increased employment on EU vessels for African PTC nationals, however may not be advisable**, because: i) there are limits to the number of ACP crew that could be employed; ii) increases in ACP crewing requirements could increase the risk of lower interest by EU vessels in SFPAs; and iii) EU SFPAs are already generally aligned with the obligations imposed on other foreign fleets.
27. **Working conditions on board EU fishing vessels for PTC nationals** are in general good with wages in compliance with the Protocol terms, which are based on the International Labour Organisation (ILO) Principles and other ILO provisions. Weaknesses and therefore room for improvements may however still exist as reflected in the recent strike by Ivorian and Senegalese seafarers employed on EU purse seiners operating in the Atlantic and Indian oceans. Improvements could serve to increase the number of crew from African PTCs willing to work on EU vessels.

Findings and conclusions about sectoral support⁵ processes and content

In terms of sectoral support **content**:

28. The CFP (Article 32.1 and 32.2) does not have a specific objective or requirement to target small-scale fisheries. Nevertheless, **sectoral support in many SFPAs has a strong focus on small-scale fisheries and food security. There are however significant differences between countries, and for some countries (Cabo Verde, Gabon, Liberia and Côte d'Ivoire) sectoral support does not have a strong focus on small-scale fisheries**.
29. **PTCs lead the programme process but are often poorly-equipped in terms of capacity and experience to develop sufficiently robust sectoral support programmes** which have a strong intervention logic and which appropriately specify robust indicators and targets. Weaknesses in indicators undermine the usefulness of

⁵ SFPA sectoral support

sectoral support matrices for subsequent monitoring of sectoral support activities and evaluation of their effectiveness.

30. **Low levels of engagement of small-scale fisheries and women's interests** in the planning of sectoral support **may suggest that sectoral support content is not fully optimal in terms of meeting their real needs and interests.**
31. **The lack of activities specifically intended to support gender equity is a recurrent weakness in many sectoral support programmes**, as is the **absence of gender disaggregated data** for the indicators and targets specified in many sectoral support matrices.

With regards to sectoral support **processes**:

32. **Implementation progress of sectoral support is not shared/communicated in many countries, reducing visibility for the EU and PTC governments** about many beneficial activities and steps that are enabled through the sectoral support funding, **and reducing potentially useful input from stakeholders** to improve the implementation of sectoral support during Protocols.
33. **Governments in African PTCs appear receptive to greater levels of consultation with and involvement by stakeholders** in the planning and implementation of sectoral support, suggesting that weaknesses in existing processes could be easily corrected. This could involve a more structured and coordinated process to involve stakeholders, including donors, in planning sectoral support, and in inputting to changes/adjustments made to sectoral support programmes during Protocols.
34. **While coordination between EU institutions over the content of sectoral support is good, wider coordination between all donors in many African PTCs is less frequent**, and many countries do not have regular fisheries sector donor coordination meetings (either involving government institutions or not). This increases the risk of duplication of donor activities with sectoral support activities or inefficient expenditure.
35. **Joint Committees typically rely on financial utilisation of the EU contribution as the indicator of performance** of the sectoral support programme, rather than considering the actual outcomes (due to poor specification of multi-annual sectoral support matrices).
36. **Full utilisation of sectoral support funding within the expected periods does not always take place, implying inefficiencies or problems related to programming and implementation** of the sectoral support funding.
37. **The quality and timeliness of PTC annual implementation reports could in many cases be improved.**
38. While the Protocols allow for the multi-annual matrix to be adjusted during the Joint Committee meetings or through and exchange of letters based on emerging/changing needs, **changes to sectoral support matrices made during Protocols are often minor**, which may not be optimal given the relatively long periods over which Protocols last (typically 4-6 years) which may imply significantly changing needs.

Recommendations to increase beneficial linkages between EU fleets and African PTCs

The EU and African partner third countries should:

39. **Continue to critically assess on a SFPAs-by-SFPAs and a species-specific basis the extent to which mandating or incentivising a part of landings is appropriate**, and where possible and relevant to do so, include relevant provisions in future Protocols. Assessments should consider the conditions present in different PTCs, and the risks of displacement of benefits between PTCs and impacts on domestic markets.
40. **Use the strength of the partnership between the EU and PTCs to ensure non-EU foreign-flagged vessels** (or those with foreign beneficial ownership which are locally flagged⁶) **are** subjected to sufficient control and surveillance and that their numbers do not negatively impact on resources available for catch by local fleets, or negatively impact on the linkages between EU fleets and PTCs through their impacts on EU vessel catches.
41. **Continue to critically assess the requirements in Protocols for EU vessels to use seamen from African PTCs as crew**. Assessments should take into account the existence of suitably qualified personnel in different African countries, the location of EU vessel landings, the potential (and risks) to increase the number of crew required to be from ACP countries and/or specific PTCs, and the risk of displacement of crewing opportunities from some PTCs to others.
42. **Continue to provide support for research, management and enforcement activities, especially for non-tuna species** (given that research and management arrangements for tuna are generally more advanced), which can contribute to resource improvements, catches, and potentially therefore greater landings by EU vessels in PTCs.
43. **Support continued improvements in the working and employment conditions of seamen from African PTCs working on EU vessels** through enforcement of the social clause in Protocols.
44. **PTCs should ensure that clauses of Protocols related to observers are adhered to**, that observers are deployed as intended, and that observer salaries are paid on time.

International development partners should as part of their future development programmes and assistance:⁷

45. **Support improved resource management through the provision of funding for research and enforcement activities** to maintain and rebuild stocks, particularly for non-tuna species which are part of multi-species agreements.
46. **Fund a comparative assessment of port infrastructure and services in all African PTCs and African countries** in a position to receive catch from EU vessels, to ensure that African ports are competitive, and meet the current and future needs of visiting foreign vessels.

⁶ Vessels flagged in African PTCs but with foreign beneficial ownership are not subject to conditions of non-discrimination between them and EU fleets.

⁷ where sectoral support programmes do not provide for sufficient funding to meet all needs.

47. **Fund market strategies to facilitate and promote the sale of high value species in African PTCs**, where such strategies are certain not to pose a risk to local catching sectors in terms of competition.
48. **Provide technical assistance and funding to help African PTCs comply with EU food safety / sanitary standards to trade fishery products for human consumption** and having competent authorities approved, where not already the case and where exports to the EU are considered a realistic possibility.
49. **Support investigations and provide equipment and infrastructure in selected African PTCs to enable them to [better] utilise and add value to bycatch**, and to use low value species for human consumption rather than as fish meal.
50. **Provide funding for enhancing capacities of PTCs to train crew and observers in line with international standards, in working conditions and safety at sea for instance**. This could involve both funding for existing training programmes, as well as capacity building and support for training schools (training of trainers, provision of training equipment/facilities, etc)

Recommendations to increase the benefits to African PTCs from the sectoral support component of SFPAs

The EU and African partner third countries should:

51. **Ensure that representative organisations for small-scale fishers and women (and indeed for all private sector and NGO stakeholders) are involved in development of the multi-annual sectoral support programmes/matrices** which are prepared for discussion and approval at the first Joint Committee meeting.
52. **Make the sectoral support annual implementation reports and relevant parts of Joint Committee meeting minutes public and disseminate key findings from them through appropriate national level consultations** events (e.g. annual stakeholder meetings).
53. **Systematically use and refer to the FAO's Voluntary Guidelines for Securing Sustainable Small-Scale Fisheries in the context of food security and poverty eradication as a way of increasing small-scale fishers in decision-making** and making sure their interests continue to be reflected in the sectoral support programmes.
54. **Adopt a more gender inclusive approach to the planning of sectoral support**, include gender disaggregated data into indicators and targets specified within multi-annual sectoral support matrices, and ensure that sectoral support programmes include activities specifically targeted at ensuring gender equity and equality.
55. **Include funding in sectoral support programmes for external audits** of disbursements and/or allow independent audits by third parties.
56. **Consider whether a set of standardised indicators could be developed and used across all SFPAs** to allow for aggregation of outputs and results.

International development partners should:⁸

57. **Provide support (technical and financial) for mobilising consultation by PTC governments** with small-scale fishers and women's groups to ensure their views and

⁸ Where sectoral support programmes do not provide for sufficient funding to meet all needs

needs are reflected in the proposals for the sectoral support developed by PTCs prior to the first Joint Committee meeting.

58. **Develop a 'toolbox', manual and guides to aid PTC governments with the development and implementation of sectoral support**, in terms of both sectoral support processes and content.
59. **Support PTCs through the provision of suitable technical expertise (including in monitoring and evaluation, small-scale fisheries and gender issues) in the identification of the multiannual programme** (needs, objectives, activities, logframe, M&E, matrix, risks, etc) for approval by the first Joint Committee meeting (potentially using the toolbox and manual proposed above).
60. **Provide technical support to PTCs in the preparation of annual implementation reports** and where necessary proposals for sectoral support matrix revisions to be submitted to the JCs (potentially using the toolbox and manual proposed above).
61. **Facilitate and participate in national level donor coordination committees** to take place at appropriate intervals (e.g. every 4-6 months) to ensure coordination and coherence between SFPAs sectoral support and other donor activities.
62. **Coordinate at the international level**, for example through the African Union or sub-continental groupings (such as the Economic Community of West African States [ECOWAS]), **to ensure that fisheries or other human resource capacity development programmes are cognisant of SFPAs** and their requirements for good implementation of sectoral support programmes. This could for example include high level political commitments or memorandums of understanding stating that support to different countries should be integrated and coherent with SFPAs sectoral support and include the provision of training to aid PTCs with the development and implementation of sectoral support programmes.

1. Background

1.1 Introduction

This report was prepared by **Poseidon Aquatic Resource Management Limited**, under an assignment to consider ‘Potentials of EU Sustainable Fisheries Partnership Agreements (SFPAs) and development cooperation for the sustainable development of local fisheries sectors’. The assignment was funded by the German Federal Ministry for Economic Cooperation and Development (**BMZ**).

This document is the final project report resulting from work completed over an 18-month period from early 2022 to late 2023. Information about the methodology used to complete the assignment is provided in Section 1.3 below.

Improving the effectiveness, efficiency, relevance, coherence, and acceptability of SFPAs is an ongoing process which has been taking place over many years since the European Union (EU) first started signing access agreements with third countries in the 1970s. While significant improvements have been made in many areas, there is still scope to improve the SFPAs and their implementation to ensure sustainable benefits for all parties concerned. The EU itself recognizes this and recently published a horizontal evaluation of all SFPAs (Caillart et al. 2023) covering the period 2015-2020 to generate lessons, draw conclusions and make recommendations. This assignment for BMZ builds on the horizontal evaluation and other evaluations of SFPAs⁹ by placing a focus on the development impact and potentials of SFPAs in **African partner third countries (PTCs)**. African PTCs represent the majority of countries having an SFPA with the EU.

The primary research questions investigated during the assignment were:¹⁰

1. How to ensure increased levels of benefits from EU fleet activities in African countries, in terms of fish landings and employment, and contributions to food security and national socio-economic benefits?
2. How to design and implement the sectoral support component of SFPAs most effectively, in particular to support small-scale fisheries, gender equity and food security?
3. How to ensure that complementary activities by donors/development partners can contribute to maximising the benefits of the SFPAs?

1.2 SFPAs

Sustainable Fisheries Partnership Agreements (SFPAs)¹¹ are international agreements concluded by the EU with PTCs for the purpose of obtaining access for EU vessels to their waters and resources, and in exchange provides financial compensation and through it supports the development of the sectoral policy in the country. The financial contribution of SFPAs includes **two components: the access component** defining the technical and financial conditions governing access by EU fishing vessels to the waters of the PTCs, and the **sectoral support component** to support implementation of the fisheries policy of the PTC. These two components are “decoupled” in the sense that one component is commercially oriented (access), with the other being oriented towards development and

⁹ Ex post and ex ante evaluations are conducted before Protocols to SFPAs expire and before new Protocols are negotiated between the EU and PTCs.

¹⁰ The original research brief is provided in Annex 1, with a reformulation of the primary research questions agreed during the assignment.

¹¹ References to SFPAs in this report relate to both SFPAs and Fisheries Partnership Agreements (FPAs). The EU still has FPAs in force with some third countries (for instance in Cabo Verde). FPAs still in force were signed before 2012/2013.

management support (sectoral support). The two components are subject to different management rules due to their specific nature.

The **general objective** of SFPAs, and FPAs still in force,¹¹ is to ensure that fishing activities in the waters of PTCs are deployed in accordance with the international obligations of the EU as well as with the objectives and principles of the EU Common Fisheries Policy (CFP). **The specific objectives of SFPAs** are to i) contribute towards resource conservation and sustainable exploitation of marine resources in the waters of the PTCs, ii) contribute to the economic viability of the EU distant-water fleet and the employment linked to this fleet, and iii) support the development of a sustainable fisheries sector in the PTCs.

There are currently thirteen SFPAs with implementing Protocols in force, including three 'multispecies' SFPAs (Greenland, **Mauritania, and Guinea-Bissau**) and ten 'tuna' SFPAs (**Cabo Verde, Cook Islands, Gabon, Côte d'Ivoire, The Gambia, Madagascar, Mauritius, São Tomé and Príncipe, Senegal, and Seychelles**). In the case of **The Gambia and Senegal**, limited additional fishing opportunities are provided to exploit demersal species (deepwater hake).

In addition, there are seven SFPAs without implementing Protocols in force - the so-called 'dormant' SFPAs (**Equatorial Guinea, Kiribati, Liberia, Federated States of Micronesia, Morocco¹², Mozambique** and Solomon Islands).

Joint Committees are responsible for the monitoring of the implementation of each SFPA and are comprised of representatives of the EU and the PTCs, with important inputs from Joint Scientific Committees and regional fisheries management organisations (RFMOs) informing decision-making.

Table 1: EU financial commitments made under the framework of the SFPAs with African PTCs for active Protocols (in EUR)

Partner third country (PTC)	SFPA start date	Protocol start date	Protocol end date	EU annual* contribution access	EU annual* contribution sectoral support	Total EU Annual* contribution
Cabo Verde	20/03/2007	20/05/2019	19/05/2024	400 000	350 000	750 000
Gabon	16/04/2007	29/06/2021	28/06/2026	1 600 000	1 000 000	2 600 000
Guinea-Bissau	16/06/2007	15/06/2019	14/06/2024	11 600 000	4 000 000	15 600 000
Côte d'Ivoire	01/07/2007	01/08/2018	31/07/2024	330 000	352 000	682 000
Madagascar	01/07/2023	01/07/2023	30/06/2027	700 000	1 100 000	1 800 000
Mauritania	30/11/2006	15/11/2021	15/11/2026	57 500 000	3 300 000	60 800 000
Mauritius	28/01/2014	21/12/2022	20/12/2026	275 000	450 000	725 000
São Tomé and Príncipe	01/06/2006	19/12/2019	18/12/2024	400 000	440 000	840 000
Senegal	20/11/2014	18/11/2019	17/11/2024	800 000	900 000	1 700 000
Seychelles	24/02/2020	24/02/2020	23/02/2026	2 500 000	2 800 000	5 300 000
The Gambia	31/07/2019	31/07/2019	30/07/2025	275 000	275 000	550 000

Source: EUR-LEX <https://eur-lex.europa.eu>, DG MARE / [Sustainable fisheries partnership agreements \(SFPAs\)](#) ([europa.eu](#))

Note * The EU contributions shown in the table are for the first year of the Protocols. For certain Protocols, they increase or decrease over time.

¹² The EU/Morocco SFPA agreed in 2019 recently became 'dormant'. The Protocol expired 17/07/2023 and had an annual contribution of EUR 37 million (EUR 19.1 mn for access and EUR 17.9 mn for sectoral support).

1.3 Methodology

The workplan for the assignment is provided in Figure 1 overleaf and shows the phases and main tasks completed during the assignment.

1.3.1 Overall approach

The assignment was completed over **three main phases**.

- Phase 1: Inception and planning phase
- Phase 2: Main research implementation phase
- Phase 3: Completion and reporting phase

There were **four main deliverables** required of the assignment (shown as a blue X in the workplan):

- Project inception report
- First project progress report
- Second project progress report
- Final project report (this report)

The contents and structuring of this report reflect the fact that evidence (from literature and consultations) is used to generate **findings**, from which **conclusions** can be drawn in relation to the main research questions. Based on the findings and conclusions, **recommendations** are made.

The main research phase was comprised of i) a **desk-based literature review** (see Annex 4), ii) **remote consultations** in the EU and African PTCs (see Annex 3), and iii) **in-country work** in four African PTCs: The Gambia, Madagascar, Mauritania, and Senegal (see Annex 6). The **Poseidon study team** consisted of three international consultants (English and French speaking), supported by a local consultant in each of the four countries for the in-country work.

The **approach to the literature review** was to draw heavily on the recent horizontal evaluation of the SFPAs (Caillart et al, 2023), as the horizontal evaluation itself involved: i) an extensive review of the literature; and ii) its own targeted consultation. However, in a number of cases our literature review involved going back to original literature sources used in the horizontal evaluation (e.g. SFPAs evaluation reports) to clarify/confirm certain issues. The intention of this assignment was to build on the horizontal evaluation, so drawing extensively on its findings as a form of baseline information, to which this assignment adds, was appropriate. Additionally, reviewing the consultation findings from the horizontal evaluation as presented in Caillart et al (2023) enabled our own targeted consultation to build on, rather than repeat, that of the horizontal evaluation.

For our targeted remote consultations, stakeholders were grouped into those in charge of the implementation of SFPAs (e.g. EU institutions, EU Member State (MS) managing authorities, and PTC governments), those impacted by SFPAs (EU and PTC private sector fishing companies and representative organisations), and those having a stated interest in SFPAs (e.g. civil society). Questionnaires were prepared and tailored for different types of stakeholders and made available in a variety of working languages used by stakeholders, i.e. English, French, Spanish and Portuguese. Initial emails were followed by up to two reminders at appropriate intervals, and stakeholders were offered the possibility to have phone/video-call discussions to go through the questionnaire as a complement/instead of a written response. Questionnaires were discussed with stakeholders where necessary or requested, using video-calls or by telephone to clarify responses.¹³

¹³ 40 stakeholders of the 118 consulted provided feedback to the remote consultation (see Annex 3). A response rate of around 1/3 is not considered unusual or unexpected for an exercise of this nature, and the provision of responses was facilitated by the approach taken.

In-country work in The Gambia, Mauritania, and Madagascar included **three missions** by an international consultant to each country, concluding with **national workshops to discuss and validated findings, conclusions, and recommendations** with local stakeholders. Due to late agreement to include **Senegal** as a fourth country, research and consultation in Senegal was only conducted by the national consultant and did not include a concluding national workshop. Detailed country reports for each of the four countries are provided as Annexes to this report. Information related to the four case study countries from the in-country work is embedded within the main text of the report.

The completion and reporting phase included a **workshop held in Brussels** (19th October 2023) at which the contents of a draft final report were presented for validation, comment, and feedback prior to finalisation of this report. (see Annex 5 for participants).

The assignment was guided by an **Advisory Committee** (AC) (see Annex 2 for members) which provided verbal feedback on the four main deliverables during the AC meetings (shown as red X in the workplan) as well as written comments. Minutes of the AC meetings were prepared by Poseidon and circulated after the meetings.

1.3.2 Methodological challenges

The literature review built on the recently published horizontal evaluation and evaluation reports prepared by DG MARE, but the horizontal evaluation was part of the literature which needed to be considered during this assignment. The horizontal evaluation is itself based on a review of much of the relevant literature, reducing the ability for this assignment to generate much new information from the literature. Additionally, the authors of this work also made contributions to the horizontal evaluation and therefore had a deep initial knowledge of the subject, and logically used the horizontal evaluation during the literature review. All the above, mean that some of the contents of this report necessarily, and unavoidably, draw strongly on the horizontal evaluation (where text relies on literature rather than our consultations).

Our **remote consultations** involved approaches to more than 120 organisations in the EU and Africa, as noted above consisting of those in charge of the implementation of SFPAs, those impacted by SFPAs, and those having a stated interest in SFPAs. Despite questionnaires being prepared in four languages and a series of reminders sent, the response rate was only just over 30%. Responses served to validate the contents of the horizontal evaluation and generated new information given a different focus in questioning but did not provide as much new information as had been hoped.

The budget and time available for **in-country work**, only allowed for in-country work in four countries. And when coupled with data weaknesses in the countries, were in some cases insufficient to allow for full exploration of topics of interest. As one example, in the Gambia, while it was identified that landings of demersal bycatch by EU vessels (currently not the case) would contribute to employment of female traders, it was not possible to answer with certainty *how many* traders would benefit as data on traders are unavailable and the assignment budget and time in-country was not sufficient to conduct extensive primary data collection through surveys. Additionally, it was not possible to conclude whether there would be any negative impacts on local fishers from increased product on the local market resulted from depressed prices for local catches with increased landings by EU vessels.

1.3.3 Added value of this assignment

Despite the challenges noted above, this assignment has provided **new learning** over and above the contents of the horizontal evaluation, and **validation of many of the findings in the horizontal evaluation which is also useful**.

The **literature reviewed includes references not reviewed by the horizontal evaluation** given that the horizontal evaluation literature review was completed in 2021 even though it was published only recently.

The focus just on African countries during this assignment has also been different to the horizontal evaluation, and enables this report to present **African-specific data and information**.

In-country work was not completed for the horizontal evaluation, given its completion during a period of COVID-19 restrictions and the methodology it used. The fact that this assignment provided for **in-country work by international consultants, supported by local consultants, enabled a level of understanding not generated by the horizontal evaluation**. For example, our in-country work was useful in understanding port and processing conditions in the countries visited, and allowed for an assessment of the content and the processes being used for programming and implementing sectoral support which would never be possible from relying solely on remote consultations. The **in-country work also allowed for national level momentum around country-specific conclusions and recommendations through national level workshops** which involved governments, civil society, and local small-scale and womens' representatives.

This study had a **specific focus on small-scale fisheries, food security and gender** (in line with the interests of the funder/BMZ) and allows our conclusions and recommendations to be tailored to these issues.

Additionally, and adding value, is that the **recommendations in this report are tailored to different stakeholder groups**, which was not the case in the horizontal evaluation – indeed that report does not contain recommendations as such, just a list of potential 'needs'. Recommendations in this report for the EU and African governments can be considered by them, but will also be useful for civil society and donors in terms of their advocacy work. This report also includes recommendations directed specifically at donors.

Figure 1: Assignment workplan

Phases, activities and deliverables	Month	2022												2023											
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Inception and planning phase																									
1.1 Plan for and hold kick off meeting																									
1.2 Establishment of Advisory Committee																									
1.3 Identification of documentation																									
1.4 Stakeholder mapping																									
1.5 Preparation of inception report																									
1.6. Plan for and hold Advisory Committee meeting					X																				
Deliverable 1: Inception report				X																					
Main research phase																									
2.1 Literature review																									
2.2 Preparation of consultation tools																									
2.3 Targeted consultations (remote)																									
2.4 Selection of countries for in-country engagement																									
Deliverable 2: First progress report									X																
2.5 Second Advisory Committee meeting										X															
Revised first progress report											X														
2.6 In-country consultations/visits																									
Deliverable 3: Second progress report																									
2.7 Third Advisory Committee meeting																									
Completion and reporting phase																									
3.1 Preparation of draft report and Brussels workshop																									
3.2 Finalisation of report and dissemination																									
Deliverable 4: Final report																								X	

2. Linkages between EU fleets and partner third countries: Findings

2.1 Introduction

Text in this section is based on the literature review, remote consultations, and in-country consultations completed. It explores the **extent of linkages that occur** between EU vessels and different PTCs, and the main **drivers of those linkages**. It should be noted that while an objective of the SFPAs is to foster linkages between EU fleets and African PTCs, it is not a directly expressed objective of such linkages to support food security in African countries. Rather, one intention of SFPAs is for EU catches to supply the EU market.

There are a variety of different **types of linkages** that can occur between EU vessels granted fishing authorisations under SFPAs, and the PTCs in Africa. Conceptually they can be categorised into the following:

- Landings of fish by EU vessels for sale on local markets in the PTC.
- Landings of fish by EU vessels in the PTC but destined for export to other markets outside of the PTC (either without any onshore processing or following onshore processing in the PTC).
- Transshipments of fish caught by EU vessels in ports of PTCs (but which are not landed in the PTC).¹⁴
- Port visits independent of landings or transshipments.
- Ship-based employment of crew and observers from PTCs on EU vessels.

These **linkages generate benefits to African PTCs in a variety of forms**, discussed further in this section. As highlighted in our remote consultations, these benefits include:

- Provision of fish to local markets, thus contributing to local food security and employment for local traders.
- Provision of raw material to processing plants/business located in African PTCs, thereby contributing to local employment and economic benefits.
- Vessel visits and landings, requiring goods and services (e.g. fuel, chandlery, vessel repairs, port services, etc) to be purchased from African PTCs which generate economic benefits and employment.
- Employment onboard EU vessels.

2.2 Landings by EU vessels in PTCs

2.2.1 What determines where catch is landed?

There are **three main drivers of linkages between EU fleets and PTCs in terms of landings**:

- Content of the SFPAs Protocols.
- Conditions in the PTCs.
- Characteristics and interests of the EU vessels.

¹⁴ Transshipment is the unloading of all or any of the fish on board a fishing vessel to another fishing vessel either at sea or in port. The volumes of fish involved do not constitute a landing into the country where the transshipment takes place, even if they take place in a port in that country rather than in the EEZ of that country.

⁶ Based on Caillart et al, 2023 and the individual Protocols to SFPAs between the EU and African PTCs.

Taking these in turn, the **requirements of the Protocols**¹⁵ implementing SFPAs have two main types of provisions in relation to fostering linkages between EU fleets and the PTCs:

- *Provisions mandating landings* in the ports of PTCs: provisions apply in the case of Gabon,¹⁶ Mauritania,¹⁷ Morocco (recently expired Protocol)¹⁸ and Senegal.¹⁹ Protocols may also include provisions mandating landing of an in-kind contribution for access resulting in a proportion of catch to be donated by EU shipowners to the PTC in exchange for access (i.e. Guinea-Bissau as from 2019 for trawlers, Mauritania as from 2012 for trawlers).²⁰
- *Provisions incentivising landings* in the port of PTCs: the incentive proposed by the Protocols was in the form of a discount on the access fees. Such provision applied in the case of Cabo Verde (until 2018), Liberia and Madagascar (until 2018).

Other Protocols with no specific binding provisions²¹ in relation to *landings* in the port of the PTCs are: Côte d'Ivoire, Cabo Verde (current Protocol), Guinea-Bissau, Madagascar (current Protocol), Mauritius, São Tomé and Príncipe, and Seychelles.

Important to note is that Protocol provisions relate to landings only, not to the sale of catch to local industries or on the local market. There are no SFPAs mandating sales to local industries.

Linkages in terms of landings may also be strongly influenced by **conditions in the PTC and nearby countries** which may compete for visits/landings from EU vessels, including:

- port landings infrastructure;
- port services and charges;
- local demand by traders and processors from the EU or the PTC for EU-caught fish, based on local demand for fish and/or the presence of processing facilities to be used prior to export;
- compliance by PTC with conditions/obligations of exports to the EU e.g. sanitary and phytosanitary measures (SPS) and illegal, unreported, and unregulated (IUU) fishing rules; and
- opportunities for PTCs to export fish to the EU under preferential trade arrangements e.g. related to tariffs and quotas.

Linkages between EU fleets and PTCs in terms of landings are also strongly determined by the fishing opportunities provided for by the SFPA protocols and the fishing authorisations issued to **different types of EU vessels** from different EU Member States (MS) and their characteristics. Linkages between EU fleets and PTCs thus vary considerably due to:

- the different characteristics of the different types of EU vessels being granted authorisations e.g. purse seine, longline, pole and line, trawlers;
- the species being targeted by EU vessels e.g. tuna, demersal, small pelagic, crustacea; and

¹⁶ 30% of catch in national waters, but conditioned by the existence of operational processing industries (currently absent, a study was carried out in 2022/2023 to assess how to develop this industry).

¹⁷ 100% of fisheries products must be landed or transhipped in national ports, with some exceptions (e.g. tuna fishing vessels, last trip for pelagic vessels).

¹⁸ 30% by vessel by quarter for artisanal purse seiners and demersal trawlers and longliners, 25% of reported catch for tuna pole and liners and industrial pelagic trawlers and seiners.

¹⁹ 100% of catch of tuna pole and liners.

²⁰ Mauritania: 2% of total catch for small pelagics trawlers; 2% of by-catch for shrimp trawlers.

²¹ Some Protocols had provisions but mostly to encourage EU operators to endeavour to use local ports and third partner countries to propose incentive schemes (e.g. current Protocol in Mauritius).

- operational strategies and market links of EU vessels influencing where they chose to land.

Fishing opportunities for EU vessels are specified in the Protocols (publicly available from the European Commission website)²² specifying the number of vessels by gear type and flag state. Fishing authorisations requested by EU vessels and approved by PTCs can be deduced in most cases from the ex-post SFPAs evaluation reports (publicly available from the Publications Office of the EU).²³ A summary table (Table 2) of fisheries opportunities and fishing authorisations to EU MS is provided below. Additional information is contained in Table 3 which provides more detailed information on the fishing opportunities provided to EU vessels under mixed agreements (including for the Morocco SFPAs which recently became dormant).

²² [Sustainable fisheries partnership agreements \(SFPAs\) \(europa.eu\)](https://european-council.europa.eu/media/en/press-communications/infographic/infographic_sfpas_2019.pdf)

²³ [Home - Publications Office of the EU \(europa.eu\)](https://publications.europa.eu/en/home)

Table 2: SFPA Fishing opportunities and fishing authorisations for EU Member States in African partner third countries

EU MS	FO/FA	ES	FR	PT	DE	LT	LV	NL	PL	IT	GR	UK	IE	DK	Unall.	Reference year / period
Active SFPAs																
Cabo Verde	FO	45	16	8												2019-2022 (average for periods)
	FA	√	√	0												2019-2022
Côte d'Ivoire	FO	22	12	2												2018-2024
	FA	11	10	0												2018-2024
Gabon	FO	24	13													2021-2026
	FA	NAv	NAv													2021-2026
The Gambia - with 3 FO for trawlers (for hake)	FO	26	14								2					2019 - 2025
	FA	√	√								√					2019 - 2025
Guinea Bissau - mixed SFPA (see separate table)	FO	√	√	√		√	√		√	√	√					2019 - 2024
	FA	√	√							√						2019
Madagascar	FO	23	39							3						2023-2027
	FA	NAv	NAv							NAv						2023-2027
Mauritania - mixed SFPA (see separate table)	FO	√	√	√	√	√	√	√	√	√			√			2021-2026
	FA	√	√	√	√	√	√	√	√	√	√					2015-2018
Mauritius	FO	34	45	4						2						2022-2026
	FA	15	29	0						1						2018-2020
São Tomé	FO	21	12	1												2017-2018
	FA	15	10	0												2017-2018
Senegal - with 2 FO for trawlers (for hake)	FO	29	16													2019-2024
	FA	√	√													2015-2018
Seychelles	FO	24	18	2						2						2014-2018
	FA	15	13	0						1						2014-2018
Dormant SFPAs																
Liberia	FO	22	12													2016-2020
<i>Dormant SFPA - Protocol expired 08/12/2020</i>	FA	x	x													2016-2019
Morocco - mixed SFPA (see separate table)	FO	√	√	√	√	√	√	√	√				√		√	2019-2023
<i>Dormant SFPA - Protocol expired 17/07/2023</i>	FA	√	√		√	√	√	√	√				Nav		Nav	2014-2018
Mozambique	FO	38	28	7								1				2012-2015
<i>Dormant SFPA - Protocol expired on 31/01/2015</i>	FA	x	x	x						x	x					2004-2006
Comoros	FO	29	30	3												2014-2016
<i>No SFPA since (denounced) 03/01/2019</i>	FA	14	8													2011-2012

Source: own analysis of SFPA ex-post evaluation reports and information available from the DG MARE website. NAv = not available.

Table 3: SFPA Fishing opportunities for EU Member States under mixed agreements with African partner third countries

EU MS	FO/FA	TOTAL (TAC or reference tonnage or GT/GRT)	FO by EU MS 'unit' (per year except if specified differently)	Max nr of vessels operating at the same time	ES	FR	PT	DE	LT	LV	NL	PL	IT	GR	UK	IE	DK	Unall.	Reference year / period
Mauritania - Category 1 - crustaceans (other than spiny lobster and crab)	FO	5 000	TAC (t)	25	4 150		250							600					2021 - 2026
Category 2 – Black hake (non- freezer) trawlers and bottom longliners	FO	6 000	TAC (t)	6	6 000														2021 - 2026
Category 2BIS- Black hake (freezer) trawlers - for the total TAC see (*)	FO	3 500 (*)	TAC (t)	6	3 500														2021 - 2026
Category 3 – Demersal species (other than black hake with gear other than trawls)	FO	6 000	TAC (t)	6	6 000														2021 - 2026
Category 4 – Tuna seiners – inc. total reference tonnage	FO	14 000	Max number of vessels	25	17	8													2021 - 2026
Category 5 – Pole-and- line tuna vessels and surface long liners - inc. total reference tonnage	FO	7 000	Max number of vessels	15	14	1													2021 - 2026
Category 6 – Pelagic freezer trawlers (**)	FO	232 500	TAC (t)			2 714		13 038	59 838	55 967	64 976	27 107				8 860			2021 - 2026
	FO		Max nr of vessels (by quarter)	19		2		4	22	20	16	8				2			2021 - 2026
Category 7 – Non freezer pelagic vessels (***)	FO	15 000	TAC (t)													15 000			2021 - 2026
Category 8 - cephalopods	FO		p.m. Not applicable																2021 - 2026

Source: Poseidon's elaboration adapted from https://oceans-and-fisheries.ec.europa.eu/fisheries/international-agreements/sustainable-fisheries-partnership-agreements-sfpas/mauritania_en

Important note: the accurate data above may require a thorough cross-checking of the Protocol and its complementary legal texts to ensure data above are correct and up to date (note about the 'Brexit': UK has been removed by the EU from the initial fishing allocation by EU MS to the current one)

Other notes: (*) TAC in t: Black Hake 3 500 t, Squid 1 450 t, Cuttlefish 600 t; corresponds to the category '2a' in the EU legal framework - Council Regulation (EU) 2015/2192 for instance

(**) Global TAC of 225 000 t - This figure may be exceeded by a 10 % margin without any impact on the financial contribution paid by the European Union for access; allocation by EU MS rounded off to the decimal point

(***) If these fishing opportunities are utilised, they shall be deducted from the total allowable catch provided for in category 6.

Legend: per memory - p.m.; Unall. - unallocated

EU MS	FO/FA	TOTAL (TAC or reference tonnage or GT/GRT)	FO by EU MS 'unit' (per year except if specified differently)	Max nr of vessels operating at the same time	ES	FR	PT	DE	LT	LV	NL	PL	IT	GR	UK	IE	DK	Unall.	Reference year / period
Guinea-Bissau - Category - trawlers - freezer fin-fish trawlers (cat. 1)	FO	11 000	TAC (t)	-	9 500								1 000	500					2019 - 2024 (from 2022)
Category - trawlers - freezer cephalopod trawlers (cat. 1)	FO	1 500	TAC (t)	-	1 200								150	150					2019 - 2024 (from 2022)
Category - trawlers - small pelagics trawlers (cat. 5)	FO	18 000	TAC (t)	-	3 900		700		6 000	6 000		1 400							2019 - 2024 (from 2022)
Category - tuna vessels - freezer tuna seiners and surface longliners (**)(cat.4)	FO	-	Max number of vessels	28	14	12	2												2019 - 2024 (from 2022)
Category - tuna vessels - pole-and-line tuna vessels (**)(cat. 3)	FO	-	Max number of vessels	13	10	3													2019 - 2024 (from 2022)

Source: Poseidon's elaboration adapted from https://oceans-and-fisheries.ec.europa.eu/fisheries/international-agreements/sustainable-fisheries-partnership-agreements-sfpas/guinea-bissau_en and Council Regulation (EU) 2019/1089 of 6 June 2019 (<http://data.europa.eu/eli/reg/2019/1089/oj>)

Important note: the accurate data above may require a thorough cross-checking of the Protocol and its complementary legal texts to ensure data above are correct and up to date; UK is not an EU MS anymore since 2022

Other notes: (*) listing of categories however not numbered from the Council Regulation (EU) 2019/1089, number of cat. from the protocol; (**) No reference tonnage provided in the Protocol for tuna vessels but an advance payment by vessel to obtain a FA related to an expected volume of catch

Legend: Unall. - unallocated; cat. - category

Update August 2023: the SFP in Morocco is now dormant - the Protocol expired on 17/07/2023

EU MS	FO/FA	TOTAL (TAC or reference tonnage or GT/GR T)	FO by EU MS 'unit' (per year except if specified differently)	Max nr of vessels operating at the same time	ES	FR	PT	DE	LT	LV	NL	PL	IT	GR	UK	IE	DK	Unall.	Reference year / period
Morocco - Category 1 - small-scale fishing in the north, pelagic species (seiners < 150 gross tonnage (GT) each)	FO		Max number of vessels	22	22														2019 - 2023 (from 2022)
Category 2 - small-scale fishing in the north (bottom longliners < 40 GT each)	FO		Max number of vessels	25	25	7													2019 - 2023 (from 2022)
Category 2 - small-scale fishing in the north (bottom longliners ≥ 40 GT < 150 GT each)	FO		Max number of vessels	0			3												2019 - 2023 (from 2022)
Category 3 - small-scale fishing in the south (pole-lines < 150 GT per vessel; Total ≤ 800 GT)	FO		Max number of vessels	10	10														2019 - 2023 (from 2022)
Category 4 - demersal fishing (bottom longliners ≤ 150 GT each)	FO		Max number of vessels	11	7		4												2019 - 2023 (from 2022)
Category 4 - demersal fishing (trawlers ≤ 750 GT each; Total ≤ 3 000 GT)	FO		Max number of vessels	5	5								0						2019 - 2023 (from 2022)
Category 5 - tuna fishing - pole or line fishing vessels (*)	FO	-	Max number of vessels	27	23	4													2019 - 2023 (from 2022)
Category 6 - industrial fishing for pelagic species (**)	FO	100 000	TAC(t) (***)	18	619	3 503	2 060	8 568	27 417	15 422	32 550	5 995				3 865			2019 - 2023 (from 2022)

Source: Poseidon's elaboration adapted from Council Regulation (EU) 2019/440 of 29 November 2018 (<http://data.europa.eu/eli/reg/2019/440/2021-01-01> - consolidated version from 1 Jan. 2021)

Important note: note that the TOTAL 2022 TAC has been modified with a 6% reduction by mutual agreement between the EU and Morocco - the EU legal text is not up to date for the moment

The accurate data above may require a thorough cross-checking of the Protocol and its complementary legal texts to ensure data above are correct and up to date; UK is not an EU MS anymore since 2022 (the allocation above for cat. 6 is an update considering the UK exit from the EU)

Legend: Unall. - unallocated

Other notes: main fish species covered by category - Category 1: sardines, anchovies and other pelagic species - Category 2: sabers, sparidae and other demersal species - Category 3: croaker, sparidae - Category 4: black hake, sabers, palometes - Category 5: tuna - Category 6: sardines, sardinella, mackerel, horse mackerel, anchovies

(*) No reference tonnage provided in the Protocol for tuna vessels but an advance payment by vessel to obtain a FA related to an expected volume of catch; (**): Distribution of vessels authorised to fish 10 vessels ≥ 3 000 GT and < 7 765 GT; 4 vessels ≥ 150 and < 3 000 GT; 4 vessels < 150 GT

(***) allocation by EU MS rounded off to the decimal point, the TAC figure originates from the Council Regulation (EU) 2019/1440 consolidated version 01.01.2021. Final TAC in 2022: 94 000 t (agreed by both parties)

2.2.2 Landings, transshipments and sale of EU catches in PTC markets and elsewhere

The table below summarises for each SFP/PTC (left-hand column) the provisions of the Protocols (middle column) and identifies the extent to which **landings of fisheries products** occurred (right-hand column) based on the findings of the ex-post evaluations of each Protocol and our consultations.

Table 4: Provisions of Protocols in relation to landings in ports of partner third countries and occurrences of landings (2015-2020)

SFP/PTC	Landing provisions	Landings occurred?
Morocco	Mandated	Yes
Mauritania	Mandated for some categories of vessels (including in-kind contribution for trawlers)	Yes
Senegal	Mandated for trawlers and tuna pole and line/bait-boats	Yes
Guinea-Bissau	In-kind contribution from 2019 for trawlers	Yes
Gabon	Mandated (conditional) ***	No
Liberia	Incentivised	No
Cabo Verde	No provision (incentivised until 2018*)	Yes
Madagascar	No provision (incentivised until 2018*)	Yes
Comoros **	No provision	No
Côte d'Ivoire	No provision	Yes
The Gambia	No provision	No
Mauritius	No provision	Yes
São Tomé and Príncipe	No provision	No
Seychelles	No provision	Yes

Source: Updated from Caillart et al, 2023. 'Landing provisions' in middle column based on Protocols. 'Landings occurred?' in right-hand column based on ex-post evaluations of Protocols and our consultations.

Notes:

* The Protocol signed in 2019 with Cabo Verde and the one signed in Madagascar in 2023 did not carry over the incentive.

** the EU fisheries agreement with Comoros was denounced in 2019.

*** In Gabon, the provision concerned 30% of catch in national waters, but was conditioned by the existence of operational processing industries (which was not the case before the expiry of the Protocol in 2016)

Based on our consultations and Caillart et al (2023):

- **Mandated landings are complied with**, in some cases (Mauritania and Morocco) requiring EU vessels to alter landings/strategies from those they would have preferred, while in others (Senegal) compliance was straightforward as in line with existing strategies.
- **Incentivised landings occurred** in Cabo Verde and Madagascar as landings in those countries is in any case desirable from the perspective of the EU fleets given their operational strategies and linkages to on-shore processing facilities. However, landings did not occur in Liberia, due to poor port/harbour infrastructure and port services.
- For Protocols with neither mandated or incentivised landings requirements, **EU vessels also made landings in Cote d'Ivoire and Seychelles**, and to a small extent Mauritius. This was due to good port conditions in these countries and the availability of services, proximity of fishing grounds and presence of onshore fish

processing facilities to which catch could be sold. No landings occurred in Comoros, The Gambia, Guinea-Bissau and São Tomé and Príncipe due to the absence of factors underpinning their attractiveness for EU operators.

- **Landings into PTCs does not necessarily mean fish is available for sale on the local market.** For Morocco and Mauritania, due to availability of established markets paying higher prices for fish paid outside of the PTC (and very limited demand for high-value fish on the national market in the case of Mauritania) almost all catch landed in the national ports was exported (by truck for fresh fish and by container for frozen fish) or transshipped (by reefer vessels for frozen fish) to the EU market or other countries. For tuna products, the tuna processing industries in Cabo Verde, Cote d'Ivoire, Madagascar, Mauritius and Seychelles had the capacity to buy part of the EU landings at competitive prices compared to international alternatives, often due to opportunities for the processed products to enter the EU market in compliance with SPS and IUU fishing rules, or under applicable quota-free and duty-free trade arrangements e.g. Everything But Arms (EBA) / GSP+ trade regime, Economic Partnership Agreements and other specific trade arrangements) granted to originating products.
- **EU vessels do however sell part of their catches for local consumption in a number of countries.** In Cote d'Ivoire,²⁴ Cabo Verde, and Senegal and in Seychelles, Mauritius, and Madagascar, EU tuna vessels call regularly or occasionally and sell their by-catch on the local market. This is catch locally called "faux-poissons" or "faux-thons"²⁵ in French-speaking countries and not intended for the local tuna canneries but rather for human consumption in the countries in which the bycatch is landed. The flow is particularly important in Côte d'Ivoire and Seychelles (around 15 000 tonnes annually on average landed by all purse seine fleets) which are the main logistical bases of EU purse seiners. In Cote d'Ivoire, the quantities of faux-thons are consumed locally fresh or after artisanal processing. In Seychelles, by-catches are consumed locally and exported to developing countries.
- **In Mauritania**, the Protocol starting in 2012 introduced a requirement for small pelagic trawlers to donate an in-kind contribution equivalent to 2% of their catch. The resulting quantities of fish add to the quantities obtained from a similar provision imposed on other foreign small pelagic purse seiners and trawlers and was distributed by a public entity to the poorest of the population at subsidised prices. Between 2018 and 2020, the in-kind contribution by EU pelagic trawlers was close to 2 000 tonnes per year on average.²⁶ The Protocol concluded in 2019 with Guinea-Bissau also foresees an in-kind contribution to be landed in the country (2.5 tonnes per quarter and per vessel for finfish/cephalopods vessels and 1.25 tonnes per quarter and per vessel for shrimp trawlers) which result in a supply of about 200 tonnes of fisheries products annually.

Product flows of catches made by EU vessels fishing under SFPAs/Protocols, can be considered separately by region and species for:

- Catches of highly migratory species (i.e. tuna, swordfish, sharks) in the West Indian Ocean (WIO).
- Catches of highly migratory species in the East Atlantic.

²⁴ In Côte d'Ivoire, the faux-thons landed by EU purse seiners fishing under the SPFA with Côte d'Ivoire were recently estimated at around 6 000 to 8 000 t / year (2023 evaluation of the SPFA between the EU and Côte d'Ivoire).

²⁵ Referring to tropical tunas not considered fit for tuna canning and by-catch species caught in association with these targeted tunas, such as king mackerel, dolphinfish, marlin, etc.

²⁶ The total quantity distributed to the local population close to 9 000 tonnes in average per year since its creation (2014) to 2022, corresponding to contributions from the EU small pelagics trawlers as well as from other fleets (Chinese, and lately Turkish).

- Catches of small pelagics in the East Atlantic.
- Catches of other high value species (crustacea, cephalopods and demersal fish) in the East Atlantic.

Caillart et al (2023) suggest **in summary when considering average annual volumes over the 2018-2020 period of catches made under SFPAs by EU vessels ‘about 90% of EU catches were sold on the EU market** (≈ 255 000 tonnes) and 10% (≈ 27 000 tonnes) on the markets of third countries’, however it should be noted that 20 000 tonnes of the 27 000 tonnes is comprised of sardines not destined for PTCs with SFPAs but which may be sold in other African countries or in South America.

Findings from the literature, remote consultations, and in-country work completed during the assignment suggest the following in terms of product flows from different ocean basins for different types of species.

For highly migratory species caught in the WIO by EU vessels fishing under SFPAs or on the high seas, Poseidon et al (2014)²⁷ report that the vast majority of the frozen purse seine catch in the WIO (around 80%) is either landed for processing/canning in Seychelles (around 30% of landings in Seychelles), or transshipped through Victoria for processing elsewhere in the WIO (around 70% of landings in Seychelles), although at some times of the year vessels land product direct to processing plants in Mauritius, Madagascar and Kenya, for canning or loining. The high levels of processing of purse seine catch in the region, and the fact that more than 90% of catches end up in EU markets, is a notable feature of the purse seine fishery. And as noted earlier, in Seychelles some purse seine by-catches are consumed locally and exported to developing countries.

Catches by Spanish, UK and Portuguese tuna longline vessels are highly concentrated in high seas areas (>75% of total volumes), although catches are also made in both Mozambique and Madagascar.²⁸ The Spanish, UK and Portuguese longline fleet mainly offloads tuna catch in Durban, South Africa, before transport to the EU (unprocessed), although at some times of the year when vessels are fishing in more northern waters, catches may be landed in Diego Suarez, Madagascar, or in Port Louis, Mauritius. Some catches are also landed in South America (Brazil) for processing. Shark fins (which for EU vessels must be landed attached to carcasses before separation from the carcasses in port in accordance with EU [not SFPA-specific] legislation) are traded to Asia (either directly from the port of landing or through Spain), shark carcasses transshipped back to Europe and sold in southern European countries, in Eastern Europe and Russia, or in South America through Brazilian buyers, and swordfish carcasses are transshipped from the WIO to reach the EU for subsequent sale, predominantly in Spain, Italy, France and Greece.

Box 1: Landings and product flows of highly migratory species by EU vessels in Madagascar

Landed tuna products in Antsiranana by EU vessels come from EU purse seine catches from Western Indian Ocean waters (including Malagasy ones when the SFPA is active). EU and non-EU fishing vessels landed 15 584 t of tuna in Antsiranana in 2022 (data²⁹ from the port authorities). EU longliners active in the Western Indian Ocean Sea basin do not land their catches in Madagascar. Landings by EU purse seiners in Antsiranana are mainly intended for the local tuna cannery. Their by-catch and tropical tunas not suitable for the local tuna cannery, are sold on the domestic market (currently outside Antsiranana and the

²⁷ POSEIDON, MRAG, NFDS and COFREPECHE, 2014. Review of tuna fisheries in the western Indian Ocean (Framework contract MARE/2011/01 – Lot 3, specific contract 7). Brussels, 78 p.

²⁸ French/Réunion vessels, being smaller in size, tend to fish in, or close to, Réunion rather than under SFPAs.

²⁹ Data provided without distinction by flag States.

Diana region): EU and non-EU purse seine vessels landed around 500 tonnes a year of faux-thons over the last three years, with 96% coming from EU purse seiners.

The EU purse seine fleet lands in Antsiranana to supply the local tuna cannery and uses a variety of ancillary services (refuelling, getting salt to brine their catches on board, boarding seafarers, etc.). However, these EU vessels land most of their catches in Seychelles (Victoria) and Mauritius (Port-Louis) where there are also canneries which are often closer to fishing grounds (depending on the time of year and fish migration), and only to a lesser extent in Madagascar (Antsiranana): Seychelles and Mauritius are therefore their main port bases. Victoria and Port-Louis provide the full spectrum of ancillary services that this fleet needs including vessel repairs and light maintenance services. The shipyard in Antsiranana is used less frequently by some of these EU (and non-EU) vessels as they typically need to bring in external technical staff and equipment for repairs which are completed there.

Antsiranana in Madagascar is thus a complementary landing place for EU purse seiners active in the Western Indian Ocean: vessels prefer landing and selling their catches in Victoria where they are based, and which is closer to their main fishing zones. They are however active in the Mozambique channel to a lesser extent at time of the year, resulting in landings to the local tuna canneries in Madagascar, where they can also get the full spectrum of ancillary services should they need them (See sections 5.3 6.2 of Annex 7 for details).

For **highly migratory species caught in the East Atlantic**,³⁰ FAD and FAD-free caught tuna by purse seiners, including EU purse seiners active in fishing areas under active SFPAs, predominantly land in four African countries and by order of importance: Côte d'Ivoire, Ghana (which does not have an SFPA), Senegal, and to some extent Cabo Verde. The 7-8 EU pole and line (P&L) vessels,³¹ permanently based in Dakar, catch tuna in the Western Africa waters from Mauritania to Guinea-Bissau and westwards in Cabo Verde (fishing opportunities are available in coastal countries further south but they generally do not use them). These vessels have a lower range of fishing activity than purse seiners, because vessels are smaller and use live (small pelagic fish such as, but not exclusively, sardinellas) and to some extent FADs to catch tuna: they land almost exclusively in Dakar. Tuna landed by EU and non-EU purse seiners and these EU bait boats are to some extent transhipped to be canned in canning factories in the countries listed above.

As noted earlier, landings of purse seine by-catch/faux-thons, and some major tropical tunas rejected by the canning factories are notable in Côte d'Ivoire, and available for sale on the local market. This is to some extent the same practice that occurs in other landing locations, but as Côte d'Ivoire is such an important hub for landing tuna for the PS fleets above, the volume of 'faux-thons' is substantial there.

EU longliners active in the East Atlantic and targeting tropical highly migratory species usually do not land in African countries. In general, these longliners target swordfish, bigeye tuna, and oceanic sharks. The EU longliner fleet land their catches in the EU including the Canary Islands. All tuna, swordfish and shark catches are ultimately destined for sale in EU markets.

³⁰ Ex-post SFPA evaluation reports & COFREPECHE, POSEIDON, MRAG et NFDS, 2013. Revue des pêcheries thonières dans l'océan Atlantique Est (Contrat cadre MARE/2011/01 - Lot 3, contrat spécifique n° 5). Bruxelles, 123 p.

³¹ also called tuna bait boats. The number of these vessels has been declining in recent years.

Box 2: Landings and product flows of highly migratory species by EU vessels in The Gambia, Senegal, and Mauritania

In **The Gambia**, SFPAs catches by EU vessels in 2021 were just under 100 tonnes for both tuna purse seiners and pole and line vessels. No tuna purse seiners or tuna pole and line vessels have made any landings of catch or port visits into The Gambia since the start of the Protocol. Port visits by tuna vessels for inspection prior to the issuing of a fishing authorisation and commencement of fishing in the Gambian Exclusive Economic Zone (EEZ) are not required. Reasons for the lack of landings and port visits relate to port infrastructure and services being poor (see Section 5.2 of Annex 6 for details), little time spent by EU vessels in Gambian waters due to the limited size of the EEZ, a lack of onshore tuna processing facilities able to receive/process catches, and the presence of other favoured ports of landing in the region e.g. Dakar for pole and line vessels, and Abidjan, Dakar and Tema for purse seine vessels. If any landings of tuna were to occur they would thus represent a displacement of landings made in other African ports. There is little reported interest in the Gambia in receiving tuna landings as local demand for tuna is not strong due to consumer preferences for other species, and developing a tuna processing and export sector is not a policy objective or priority for the Government.

In **Mauritania**, highly migratory species are a minor component of the SFPAs as the country is a peripheral fishing zone for tropical tuna. EU tuna vessels (on average, twenty purse seiners and ten pole-and-liners were authorised on an annual basis during the period 2017-2022) are not subject to any landing obligation for the fish they catch in the Mauritanian waters. As in The Gambia, they do not see any interest in landing their catch in Mauritania, as port infrastructure and services in Nouadhibou leave much to be desired (see Section 5.3 of Annex 7 for details), there is no onshore tuna processing facilities and no local market for tuna and tuna-like species, and they favour other ports of landing in the region where they have vested interests (Abidjan in particular).

In **Senegal**, tuna catches are low (less than 500 tonnes in 2022) and have declined in recent years. Pole-and-line vessels (the number of authorized vessels declined over 2020-2023 from eight down to four vessels) are obliged by the Protocol to unload in Dakar and do so. However, the two tuna processing factories based in Dakar have their own fleets of vessels and do not have established commercial relationships with EU pole and line vessels. Catches by EU vessels (which are frozen onboard) are more commonly therefore transshipped to canneries in Ghana, and to a lesser extent Côte d'Ivoire, with much of this product ending up in the EU market, but some sold in African markets. The Protocol does not specifically require tuna purse seiners and longliners to land catches in Senegal/Dakar, and these vessels do not do so (on average per year, about fifteen to twenty purse seiners and zero to two longliners were authorised to fish during the period 2020-2023). Purse seiners land their catches predominantly (80-90%) in Côte d'Ivoire (Abidjan) with the remainder being landed in Cabo Verde (mainly only Spanish catches) and Ghana. These landings are motivated by tuna canning plants located at those locations. Longline catches are not landed in Senegal, and the EU fleet targets swordfish, bigeye tuna and oceanic sharks. The EU longliner fleet lands catches in the EU, including the Canary Islands. Some bycatch/faux-poissons (albeit in limited quantities) from seiners and pole and line vessels, which is not prized by canneries, is landed in Dakar and sold on the local market, contributing to the country's food security. Since women are heavily involved in trading and processing of fish in Senegal, this activity is beneficial to women.

For small pelagic species caught in the East Atlantic under SFPAs,³² demand in Mauritania and Morocco is not strong, and Caillart et al (2023) report that around 50% of sardines caught are sold in third countries (e.g. South Africa, Brazil) for processing into cans

³² Small pelagics, such as Atlantic herrings, caught in European waters rather than under SFPAs are also exported by the EU to Africa e.g. imports of frozen herrings from the EU to Nigeria were 57 989 t in 2021 based on the EU commercial database 'EUROSTAT COMEXT'.

and consumption on national or regional markets e.g. elsewhere in Africa, and around 200 000 tonnes of all species caught under the Mauritania and Morocco SFPAs are sold in Africa, with the other 50% transshipped/sold to canneries in the EU (Spain and Portugal in particular). Other small pelagic species (mackerel, horse mackerel) are also transshipped to the EU and sold for processing and consumption in the EU, Brazil and Eastern Europe.

Transshipment at Dakhla in Morocco is reported to be difficult for larger vessels but smaller pelagic vessels do land there. For larger vessels, while sailing to Agadir is possible, it is further away than Las Palmas to major fishing grounds and would lead to higher fuel costs and less time to fish, and landing in Agadir would often still have to be followed anyway by bunkering, loading packaging material and changing crew in Las Palmas.³³

Box 3: Landings and product flows of small pelagic species by EU vessels in Mauritania

Our consultations highlighted that large small pelagic vessels fishing in **Mauritanian** waters prefer to land fish in Las Palmas, or to transship catch there rather than in Nouadhibou. Las Palmas also offers logistical advantages for exporting fish. It has better access than African ports for more and larger (export) ships in port, and large modern cold stores. The specific size of pallets that some buyers require the fish to be delivered on can be difficult to obtain in African countries. Also, packaging materials and fuel oil are much cheaper in countries other than Morocco and Mauritania.

No sales of catch are made to local companies outside of the 'fee in kind' requirements. And fish unloaded in Mauritania under the 'fee in kind' scheme represents limited quantities, as i) 2% of the by-catch from the Category 1 freezers represents only negligible quantities; and ii) there is only an annual average of five large trawlers of the Category 6 (mainly from Latvia and Lithuania) fishing for small pelagics, whose 2% of the total catch amounts to no more than 2 000 tonnes per year. Products from Category 6 trawlers are frozen and good quality so fetch higher prices than for fish meal production: all fish unloaded by EU vessels is exclusively destined for human consumption. It is unlikely that the quantities of fish unloaded in Mauritania and distributed through the local market will increase significantly in the near future. The Pelagic Freezer-trawler Association (PFA), which represents eighteen vessels from the Netherlands, Germany and Eastern European countries, has expressed interest in going back to Mauritania after ten years of absence, but has however not yet decided to do so. And it is not clear if the 'fee in kind' percentage could be increased as there is a limit to how much fish it would be viable for vessels to provide for free.

The existing fishmeal and fish oil industry in Mauritania, promoted from the second half of the 2000s onwards as a way to implement the policy of increasing fish landings in the country, absorbs the bulk of all small pelagic landings in the country (about 450 000 t/year, or almost 80% of the total landings of pelagics). The products of this industry are mainly intended for animal consumption (aquaculture) and are exclusively exported. The move towards 'more pelagics for human consumption and less pelagics for fishmeal' is a strong element of the national Sectoral Strategy, which plans to reduce the quantity of pelagics for fishmeal by 80% by 2024. In practice, the application of this policy has encountered difficulties in particular due to the reluctance of the fishmeal industry to implement the measures taken by the MPEM, the quality of the products landed, and the current freezing and storage capacities of the factories.

It should also be noted that the EU small pelagic sector, whether operating through SFPAs in Mauritania and Morocco or in EU waters makes a significant contribution to food security

³³ According to consulted representatives of small pelagic freezing EU trawlers active in West Africa, the Gross Tonnage (GT) higher limit for small pelagic vessels in the 2019 – July 2023 Protocol to the SFPAs between the EU and Morocco, now dormant, hindered their largest fishing vessels from coming to local ports.

in Africa through catches which are ultimately sold to the continent (c.a. 200 000 tonnes), even if not made in the waters of African countries with SFPAs or landed in those countries.

Other high-value fish species (namely black hake), and crustaceans caught in the East Atlantic under SFPAs are landed in Morocco and Mauritania from where all is trucked fresh or shipped by container to EU markets for sale, or in Dakar or Las Palmas in the case of frozen demersal catches, also for sale in the EU.

Box 4: Landings and product flows of other high-value species by EU vessels in The Gambia, Senegal, and Mauritania

In **The Gambia**, SFPAs catches by EU demersal trawlers in 2021 were around 400 tonnes. No EU demersal vessels have made any landings of catch into The Gambia since the start of the Protocol, either at the main commercial port or the fisheries jetty. The Spanish trawler(s) with fishing authorisations dock in the main port for inspection prior to fishing in Gambian waters as required. Reasons for the lack of landings and port visits relate to port infrastructure and services being poor (see Section 5.2 of Annex 6 for details), little time spent by EU vessels in Gambian waters due to the limited size of the EEZ, a lack of suitable onshore processing facilities able to receive/process/export frozen catches, the presence of other favoured ports of landing in the region e.g. Dakar and Canary Islands. There is interest in the Gambia in receiving demersal bycatch for sale on the domestic market. The commercial port does have quay wall length and draft to allow for demersal vessel landings, and demersal bycatch for sale on the local market would contribute to food security, benefit women traders, and be in-line with requirements placed on other foreign vessels for landing part of their catches.

In **Mauritania**, about sixteen other EU vessels fishing for high value species were granted fishing authorisations on an annual basis over the period 2017-2022. Landing obligations are defined as follows: Category 1 (shrimp freezer vessels) are subject to a *fee in kind* in the form of a requirement to unload a certain proportion of their catch without receiving monetary payments for the catches involved (2% of the total by-catch, which represents limited quantities). Fees in kind i.e. catches, are remitted to the Société Nationale de Distribution de Poisson (SNDP) for distribution and sale on the national market. Categories 1 (shrimp freezer), 2 and 2a (hake freezer trawlers and fresh longliners respectively) and 3 (demersal fish fresh trawlers) are subject to a *landing obligation* (which does not require storage or processing in Mauritania) except for the last trip (that precedes departure from the Mauritanian fishing zones). Unloading operations are mainly carried out in Nouadhibou. The freezer vessels (category 1 shrimp vessels and 2a hake vessels) disembark at the quayside at the Port Autonome de Nouadhibou (PAN), directly into containers on the quayside. The fresh fish vessels (category 2 trawlers and hake longliners and category 3, demersal fishing vessels) unload at the quayside at the PAN, directly into isothermal trucks that transport the fish on ice to markets in the EU (in Spain, Portugal in particular).

In **Senegal**, the Protocol does not specifically require demersal trawlers to land catches in Senegal/Dakar. Two to three vessels of this type were authorised per year during the period 2020-2023. They land catches both into Dakar and into Canary Islands, for final sale in EU markets. Catches under the SFPAs were over 1 500 tonnes in 2020, but for 2021 – 2023 have been between 575 and 800 tonnes a year.

2.3 Employment on EU vessels of PTC nationals

2.3.1 What determines employment on EU vessels of crew from partner third countries?

The main determinants of the number of crew employed on EU vessels are:

1. The content and requirements of the Protocols.
2. The availability of suitably qualified personnel in the PTCs to work on EU vessels.

Considering the content of the Protocols:

- **Some contain provisions mandating employment of a certain number of nationals from the PTC** onboard EU vessels. The relevant provisions consider: i) a minimum number or proportion compared to total crew of national per vessel (Comoros, The Gambia for trawlers, Guinea-Bissau for trawlers, Madagascar, Mauritania, Morocco, Seychelles); or ii) a minimum number of nationals on the whole fishing fleet segment (Cabo Verde, Mauritius, São Tomé and Príncipe as from 2019). The numbers or proportion defined by the Protocols varies according to the PTC.³⁴
- **Some contain provisions mandating employment of nationals from African Caribbean and Pacific (ACP) countries**. The relevant provisions were for between 20% or 30% of ACP nationals employed. Such provisions were introduced in the Protocols concluded with Cote d'Ivoire, Gabon, The Gambia for tuna vessels, Liberia, São Tomé and Príncipe (before 2019) and Senegal.
- **Some Protocols also have exemptions for employment of nationals, or no requirements at all**. For some fishing categories involving small-scale EU vessels (i.e. small-scale vessels of categories 2 and 3 operating under the (now dormant) SFPAs with Morocco and small-scale longliners operating under the SFPAs concluded with Madagascar and Mauritius), the relevant Protocols provide exemptions to reflect the relatively small number of crew onboard and limited accommodation facilities. For some Protocols e.g. Guinea-Bissau for tuna vessels, there were no specific provisions mandating employment of nationals of the countries or ACP nationals onboard EU vessels benefiting from fishing opportunities.

Our consultations revealed that in addition to Protocol requirements, **other factors determining the extent to which nationals of specific PTCs are employed** on EU vessels include:

- Reputation and skill levels (as validated by relevant internationally recognised certification schemes adopted by the International Maritime Organisation required by the flag state regulations) of crew and observers in/from different PTCs, in part due to a lack of training schools in different PTCs. A lack of opportunities for employment in more senior positions, and low numbers of suitable qualified PTCs nationals for such positions, is a concern.
- The willingness/availability of individuals from PTCs to work on EU vessels.
- The ability of PTC nationals to speak the languages of the vessel skipper and other senior foreign crew.
- Logistics and ease of embarkation/disembarkation of PTC nationals to/from EU vessels. There can be difficulties for EU vessels to employ seamen from certain countries when no stopover is foreseen in relevant ports.

With respect to the quality and **employment conditions** for crew onboard EU vessels (not the primary focus of research conducted during this assignment), these are governed by the so-called social clause introduced in all Protocols, which provides guarantees about contracts, wage rates being no lower than crews on national vessels or those determined by the International Labour Organisation (ILO),³⁵ working conditions meeting basic working rights laid down in the declaration of the ILO, in particular the freedom of association, the

³⁴ In the case of Mauritania, most EU fishing fleet segments are bound to employ at least 60% nationals as crew on board.

³⁵ But there is no minimum wage defined by the ILO for workers in the fishing sector. The ILO minimum wage applies to seafarers on any commercial vessel, except those ships engaged in fishing and similar pursuits (ILO Maritime Labour Convention, 2006, Article II.4).

effective recognition of the right to collective bargaining, and the elimination of discrimination. Working conditions on board fishing vessels are also bound by the ILO Convention C188 on board vessels with flag States having ratified it. EU Member States having ratified it and with fishing fleets authorised to be active in SFPAs in Africa are Denmark, Estonia, France, Lithuania, Netherlands, Poland, Portugal, and Spain – entry into force occurred in Spain in February 2024 (African countries having ratified it and of relevance to this study include: Angola, Morocco, and Senegal).

Recently (June 2023), Western African seafarers employed on board EU purse seiners in the Atlantic Ocean and the Western Indian Ocean went on strike.³⁶ They requested an increase in their remuneration amongst other grievances.³⁷ A provisional agreement was found between the EU fishing vessel operators and seafarers in September 2023 with a base salary brought up to 380 euros/month over a 6-month period.³⁸ Beyond that period, the International Labour Organisation (ILO) wage reference would apply. Both parties provisionally agreed that the seafarer contracts should systematically³⁹ include social security including a pension with the EU fishing vessel operators paying the seafarers' training courses.⁴⁰

2.3.2 Levels of employment in PTCs from SFPAs

Considering the employment benefits from these linkages for PTCs, the activities of EU fleets and resulting local landings, transshipments and processing of EU catch generate onshore employment in port services (re-supply of vessels, stevedoring/unloading, vessel repairs and maintenance), and onshore processing. The European Parliament (2016)⁴¹ estimated that **onshore employment** in the third countries supported by the operations of EU vessels in the framework of SFPAs supports around 15 000 jobs in the PTCs, mostly in industrial tuna processing plants. However, such estimates should probably be treated with caution given the difficulties of attribution, and the fact that labour involved in such activities typically support and service fishing vessels and landings from many countries not just those that are part of the EU.

Caillart et al (2023) and the European Parliament (2016) also provide information and data on **employment generated by the SFPAs for crew** from PTCs on EU vessels. Based on consultations and the SFPA ex-ante evaluation reports, Caillart et al (2023) note that Protocols' requirements were surpassed in the case of Cabo Verde, Cote d'Ivoire, Madagascar and Senegal, but were not fully complied with in Mauritius, São Tomé and Príncipe and Seychelles. In the case of the latter this triggered payments by EU shipowners of a financial penalty to the PTC according to the relevant provisions of the Protocols. Full compliance with SFPA provisions in these countries was not possible because of insufficient

³⁶ The strike affected 64 French and Spanish owned tuna vessels, two thirds of which were operating under SFPAs with Senegal, Cote d'Ivoire and the Seychelles.

³⁷ Contract durations, recruitment fees seen as excessive, late payments, lack of payment slips, issues around payment of catch bonuses.

³⁸ The basis upon which the strikes were suspended was a promise that all fishers would immediately be paid 75% of the ILO minimum pending negotiations and catch bonuses of \$1.30 per tonne

³⁹ The standard provisions on employment and working conditions of PTC nationals in the Protocols refer to a need of EU fishing vessel owners to set their wages based on the ILO standards for seafarers or the PTC minimum wage (whichever is the higher) and providing a social and health security coverage (see for example the 2023 – 2027 Protocol).

⁴⁰ Le Marin, 2 October 2023 online article

⁴¹ Impact of fisheries partnership agreements on employment in the EU and in third countries. Research for the PECH Committee IP/B/PECH/IC/2015-181. (note this study included SFPAs between the EU and Kiribati, Greenland, and the Cook Islands).

availability of trained crew,⁴² coupled with the fact that operational strategies and the movement of vessels makes the embarking and disembarking of crew from PTCs difficult in cases where EU vessels are not landing in the PTC. Côte d'Ivoire and Senegal appear to have particularly good availability of skilled seamen to work on tuna vessels. Caillart et al (2023) also note that inadequate training of PTC nationals in line with the Standards of Training, Certification and Watchkeeping for Fishing Vessel Personnel adopted by the International Maritime Organisation (Convention STCW-F of the IMO), is (at least in part) because there are few training institutes in Africa certified to deliver STCW-F training (for example those in Morocco and in Namibia), and one in the Western Indian Ocean (in France-La Réunion). Our consultations suggest that there may be few cases of seamen from African PTCs accessing positions of responsibility (officers).

The European Parliament (2016) established that around **2 850 PTC nationals were employed as crew on EU vessels**, with 2 217 employed on EU tuna vessels and 632 employed on EU non-tuna vessels operating under the multispecies SFPAs with West African countries. Caillart et al (2023) suggest that there are no indications that these numbers have changed in the recent past, notwithstanding the impacts of the COVID pandemic in 2020 which led some PTCs to relax mandatory provisions in relation to the employment of nationals (e.g. Mauritania and Morocco).

With respect to **observer employment**, Protocols include obligations to embark a scientific observer from the PTC when the EU fishing vessel is active in the PTC's waters. EU fishing vessels embark observers to conform to different observation schemes: the EU data collection framework, by deploying scientific observers required by RFMOs observation programmes, and using their own scientific observation programme⁴³. However, full compliance with the provisions in the Protocols is not always met by all EU fishing vessels. This frustrates PTCs while EU operators complain about the non-practicality of these provisions due to a lack of trained observers from the PTCs among other issues. Some countries have been able to train and then increase their pool of national observers (e.g. Mauritania and Morocco). For EU tuna fishing vessels, the transnational nature of their fishing trips are to be taken into consideration. Solutions are trying to be found by all parties, including the EU fishing operators, by training future observers in collaboration with EU fishing operators, and by developing regional observation schemes between neighbouring countries in the same sea basin (see Caillart et al. 2023).

Box 5: Employment by EU vessels of crew from The Gambia, Senegal, Mauritania, and Madagascar

In **The Gambia** the Protocol requires that 20% of crew (c.a. 4 individuals) on demersal trawlers are from The Gambia. This provision was not fully complied with in 2021 due to a negotiation between the local crewing organisation and the EU vessels involved, but observers were taken onboard as required by the Protocol. No Gambian crew are employed on EU tuna purse seiners or pole and line vessels as crew or observers. The Protocol does not require them to do so as long as an appropriate proportion of ACP crew are used and an observer is provided for the duration of a fishing trip. While the Gambian Association of

⁴² EU Member States having ratified the International Convention on Standards of Training, Certification and Watchkeeping for Fishing Vessel Personnel adopted by the International Maritime Organisation (Convention STCW-F of the IMO), are bound by its provisions: meaning that only personnel having received the minimum levels of training defined by the Convention can be offered employment. EU Member States with vessels authorised to fish under SFPAs and having ratified it to date are: Denmark, France, Latvia, Lithuania, Netherlands, Poland, Portugal and Spain (African countries of relevance to this study having ratified it are: The Gambia, Mauritania, Morocco, São Tomé and Príncipe).

⁴³ For example, the French purse seiners fund a third party multi-annual observer programme called 'OCUP' (Observateur Commun Unique et Permanent), through their producer organisation Orthongel, enabling 100% observer coverage of their fleet.

Sailors reports having suitably qualified crew and there are qualified Gambian observers and training provided through the sectoral support, EU vessels spend little time fishing in Gambian waters and do not land tuna catches in the Gambia, so making port visits to embark/disembark crew/observers would increase costs. Given Banjul's proximity to Dakar, crew and observers could travel overland to Senegal for embarkation. However, tuna vessels are either French or Spanish owned and operated and crew complements generally speak these languages rather than English, which disincentivises the use of English-speaking Gambian crew.

In **Mauritania**, the Protocol specifies a minimum number of Mauritanian seamen to be embarked on different vessels as follows: for tuna purse seiners, one person per vessel; for pole-and-line tuna vessels, three persons per vessel; for shrimp and demersal vessels, 60% of the crew rounded down, with officers (ship's master, auxiliary or coastal master, engine assistant and first engineer officer) not included in this count; for pelagic trawlers, 60% of the personnel operating in production functions (factory, packing and freezing). EU shipowners whose vessels operate in the Mauritanian waters under the current Protocol comply with their obligations in terms of employment of Mauritanian crew, for all categories of vessels. The fleets of EU vessels operating in the Mauritanian EEZ under the SFPA correspond to around sixty vessels over the year on average with, according to the Mauritanian embarkation obligations stipulated in the SFPA, around 400 Mauritanian seamen. In order to embark on foreign vessels, sailors should hold the internationally recognised Basic Safety Certificate which Mauritania is currently unable to issue because the country is not on the IMO "White List" (therefore the seamen embark without this certificate). In addition, Mauritania's re-inclusion on the 'White List' for certification of officers is conditional on the transmission to IMO of an independent audit report proving that Mauritania fully complies with the provisions of the Convention. This process is currently underway. It is also noteworthy that the Netherlands, which has vessels fishing in Mauritania under the SFPA, has negotiated a specific collective bargaining agreement to cover the rights of foreign seafarers employed onboard. Indications are that in recent times, the requirement to take onboard Mauritanian observers had not been complied with.

In **Senegal**, the Protocol specifies that for the fleet of tuna seiners and longliners, as well as for the fleet of deep-water demersal trawlers, at least 25% of the seamen signed on during the tuna fishing season in the Senegalese fishing zone must be of Senegalese origin or from an ACP country; for the baitboat fleet, at least 30%. The quota of fishermen to be taken on board EU vessels is not generally a constraint because of the Senegalese sailors' recognised qualifications and the fact that they are considered as some of the best in the sub-region. The 2006 seafarers collective agreement is considered to be unfavourable for seafarers, and obsolete. Most particularly, the prevailing pay conditions are considered unsatisfactory by the Senegalese crews (non-compliance with the ILO minimum wage), which is a source of recurrent dispute. The Protocol sets out the obligation to take on board a Senegalese observer; the number of trained observers available in the short term (2024) appears sufficient to cover the needs of EU vessels.

In **Madagascar** in the current 2023 – 2027 Protocol, EU purse seiners and EU longliners greater than 100 GT are required to use a minimum of three and two qualified Malagasy seafarers respectively. Assuming that all fishing opportunities provided by the Protocol result in fishing authorisations and that the vessel owners find the qualified Malagasy seafarers from the Malagasy authorities (conditions set in the Protocol), the current Protocol requirements, if adhered to, would result in 96 crew on EU purse seiners and 26 crew on EU longliners. Looking historically to the 2015 – 2018 Protocol, EU tuna fishing vessels were only encouraged to employ Malagasy or ACP seafarers. During the period 2015 – 2017 when the previous 2015 – 2018 Protocol to the EU fisheries agreement with Madagascar was active, Caillart et al (2023) estimated that 13 Malagasy were employed by EU vessels active in Malagasy waters (11 out of 13 from the small longliners based in La Réunion). Malagasy seafarers are employed by a large proportion of small longliners based in La

Réunion, and these sailors were trained at the Reunion training school at the shipowners' expense.⁴⁴ For other EU tuna fishing fleets active in the Western Indian Ocean, the number of Malagasy seafarers employed is low. Malagasy seafarers are in competition in terms of skills and languages on board EU purse seiners with other ACP seafarers, for instance from West Africa, with whom the EU fishing operators are used to working. Madagascar is preparing to sign and implement the STCW-F convention.

2.4 Economic benefits to PTCs from SFPAs and the linkages created with EU fleets

Based on the linkages discussed above SFPAs generate economic benefits to PTCs in the form of **direct value-added** (from access payments by the European Commission and EU shipowners), and **indirect value-added** made on the purchases of goods and services from PTCs by EU vessels fishing under the SFPAs. Based on the economic analysis presented in recent ex-post evaluation reports of different SFPAs, the average total annual value-added benefits to African PTCs from the different SFPAs averages around EUR 140 million a year (see table below).

Table 5: Average annual value-added from SFPAs for the EU, African PTCs and other countries

PTC	Value added (EUR '000s)				Notes
	EU	PTCs	Other countries	Total	Figures based on...
Cabo Verde	5 592	3 315	3 546	12 453	annual average 2019-2021
Comoros	n/a	n/a	n/a	n/a	n/a
Côte d'Ivoire*	836	1 755	717	3 308	annual average 2018-2021
Gabon	5 623	1 437	6 699	13 759	2014
The Gambia	n/a	n/a	n/a	n/a	n/a
Guinea Bissau	5 225	2 504	4 781	12 510	2015
Liberia	3 233	716	2 519	6 468	annual average 2016-2018
Madagascar	4 682	4 335	876	9 893	annual average 2015-2017
Mauritania	82 024	80 936	24 629	187 589	annual average 2016-2018
Mauritius	2 418	1 207	1 091	4 716	annual average 2018-2019
Morocco	44 439	28 962	17 887	91 288	annual average 2015-2016
São Tomé and Príncipe	3 724	1 038	4 142	8 904	annual average 2015-2016
Senegal	5 010	3 244	1 864	10 118	annual average 2015-2018
Seychelles	23 913	13 392	17 810	55 115	annual average 2014-2018
Total	186 719	142 841	86 561	416 121	

* Value-added for Côte d'Ivoire estimated from EU catches from the Côte d'Ivoire fishing zone only.

Source: own elaboration based on analysis of SFPAs ex-post evaluation reports from 2015 onwards and including those most recently completed with the exception of Morocco and Guinea Bissau (2023 evaluation reports currently unpublished). Figures for the Gambia not available as there has been no ex-post evaluation to date, however for Gambia as the PTC value-added is limited to the financial contribution for access (EUR 275 000 per year) and the wages of 2-3 Gambian crew, as there are no EU landings or port visits to Banjul. Figures for Comoros not included as SFPAs denounced and last evaluation report completed in 2013. Figures for Mozambique and Equatorial Guinea not included as it is not considered likely that Protocols will be re-negotiated so these countries are of less interest to the study. Value added figures combine direct and indirect value added.

The table shows that, based on the ex-post evaluations, Mauritania captures 57% of total value added generated by/for PTCs, Morocco 20%, and Seychelles 9%. All other African PTCs individually account for just 1-3% of the total. **These figures predominantly reflect**

⁴⁴ The shipping companies could employ more of them because of the good cost/efficiency ratio of this workforce, but they had to find a balance with the need to employ French nationals from Réunion to contribute to the economic and social development of the territory. Note, also, that around 100 Malagasy seafarers (as full-time equivalent) were employed annually for different work activities, that is not only at sea, by EU vessels active in the Western Indian Ocean (Caillart et al, 2018).

the access payments made (which explains why Mauritania and Morocco account for the largest share – see Table 1 for access payments) but also to a lesser extent ports visits, landings and processing by EU vessels in some PTCs.

The figure of EUR 142 million in the table above is however certainly an underestimate of the true economic benefits to African countries from the SFPAs and the activities of EU fleets, as well as distorting the true benefit to different/other African countries.

This is for two reasons.

1. 'Other countries' shown in the table above may include African countries, which may or may not have an SFPA with the EU. For example, when EU vessels fishing in Liberia under the SFPA land catch into Ghana and incur costs in Ghanaian ports, this generates additional value added in Ghana not shown in the table.
2. The standard methodology used in the SFPA evaluations does not capture the benefits derived by the PTC from the activities of EU vessels in the waters of other coastal States (which may be a PTC), or in international waters. Particularly in the case of Côte d'Ivoire, Mauritius, Senegal and Seychelles, the activities of the EU fleet operating outside of the EEZs of these PTCs generate quantities of catch which are landed in these countries and which result in onshore benefits. As noted in Caillart et al (2023): 'the Mauritius and Côte d'Ivoire processing industries handle annually close to 50 000 tonnes of tuna caught by the EU tuna fleet, while tuna catch in their respective waters by EU vessels is about 3 000 to 4 000 per year. Port Victoria in Seychelles is the main logistical base for tuna vessels operating in the Western Indian Ocean, resulting in additional economic benefits for the country. Similarly, Dakar in Senegal is the main logistical base for EU fishing vessels operating in neighbouring countries of West Africa such as Guinea-Bissau and The Gambia.

3. Design and implementation of the sectoral support component of SFPAs: Findings

3.1 Introduction

This section focusses on **how the sectoral support component of SFPAs can be better designed and implemented**. It does so through a lens which considers the extent of integration with international cooperation projects, along with the need to support small scale fisheries, gender equity, and food security (priorities for BMZ as the funders of this assignment).

Text in this section is based on the literature review, the remote consultations completed, and the in-country missions and consultations undertaken.

Important **legal requirements not contained within the SFPAs or their Protocols** underpin the provision of sectoral support.

- Article 32.1 b) of the CFP Regulation (EU) 1380/2013 articulates **the objectives of sectoral support**, requiring the EU to provide financial assistance to PTCs *“in order to establish the governance framework, including the development and maintenance of the necessary scientific and research institutions, promote consultation processes with interest groups, and monitoring, control and surveillance capacity and other capacity building items relating to the development of a sustainable fisheries policy driven by the third country.*
- Provision of **sectoral support funding is also conditioned**⁴⁵ on the PTC having:
 - transparent, reliable and effective management of public finances.
 - credible and relevant sectoral or national policies.
 - stability-oriented macroeconomic policies.
 - sufficient and timely access to comprehensive and sound budgetary information.
- Additionally, Article 32.2 of the CFP Regulation (EU) 1380/2013 foresees that for sectoral support payments to be made, the EU **“require[s] the achievements of specific results** as a condition for payments under the financial assistance and shall closely monitor progress”, hence the decoupling of the access and sectoral support components.

Within the legal texts of the SFPAs and their Protocols:

- The **sectoral support component** of SFPAs to support implementation of the fisheries policy of the PTC is **‘decoupled’** from the access component, managed differently, and oriented towards sectoral development and management support.
- Different articles cover a) **the financial contribution** for sectoral support, and b) **implementation modalities** for sectoral support in relation to the programming process, the reporting obligations as appropriate, the criteria for disbursements, and the time-limit for utilisation of the envelope. There are also provision in Protocols for amendment to the annual or multi-annual programmes based on approval by the Joint Committee.
- Most Protocols provide for and require that a **multiannual programme** take into account the priorities expressed by the PTC in its national fisheries policy, and maritime policy as appropriate.
- Protocols⁴⁶ require PTCs to submit an **annual implementation report** to the Joint Committee to support the evaluation of the results achieved, and a **final**

⁴⁵ Articles 186 and 236 of the Financial Regulation 2018/1046.

⁴⁶ Except in the case of Côte d’Ivoire 2018 - 2024.

report covering the whole period of the Protocol to report on sectoral funding and its use. This reporting is a requirement that has been increasing over time e.g. included in the most recent Protocols for Cabo Verde and São Tomé and Príncipe, but not before 2019.

- Arrangements are specified for the transfer of funds in tranches, with an initial payment based on needs assessed during the first Joint Committee meeting, and then annual payments based on analysis by the Joint Committee of the results achieved.

On a more **practical level and outside the legal requirements**, additional arrangements and guidelines for the implementation modalities can be made during the first meeting of the Joint Committees.⁴⁷ These guidelines are non-binding instruments annexed to the minutes of the Joint Committees detailing issues such as the objectives, eligibility requirements, programming (and the basis for amendments over time), reporting, performance indicators, payment principles and visibility requirements.

PTCs lead the programming process, submitting their proposals to the first Joint Committee, with the EU representatives within the Joint Committee then proposing any amendments to the proposals which are then mutually agreed between the parties. The first meeting of the Joint Committee is thus used to check on the **alignment of the multi-annual programme of sectoral support with national sectoral policy and EU policy**.

Fisheries Attachés contracted to/by the EU, support the regular monitoring of the activities by the PTCs between the meetings of the Joint Committees.

3.2 Sectoral support content

The horizontal evaluation (Caillart et al. 2023) of recent SFPAs/Protocols presents an analysis of the contents and impacts of sectoral supporting funding in different PTCs, noting that **multi-annual and annual programmes are well aligned with the relevant national and EU policies**. Echoing our own consultations, it found no examples of activities implemented under the sectoral support programmes that contravened the objectives of national sectoral policy.

Extracting just the data for African SFPAs used in Caillart et al (2023), the two tables below show: the split in sectoral support funding programmed over the 2015-2020 period by category of funding and by PTC (Table 6), and the focus of funding by beneficiary (Table 7).

Key findings from the tables are:

- There is a strong **focus** in the type of sectoral support funding on **infrastructure, research, MCS, fisheries management, and aquaculture development**. Combined these four categories accounted for almost 80% of the planned funding.
- Morocco (Protocol now dormant) accounts for more than 50% of sectoral support funding to African PTCs, and **Morocco, Seychelles and Mauritania combined more than 80%** of total funding.
- The **allocation of funding is fairly balanced between investments benefitting four different types of beneficiaries** in total (managing authorities, research institutions, operators in the fishing sector, and **artisanal/small-scale fisheries**). **However, these total figures mask significant differences between countries**, and as shown in Table 7, **in many countries sectoral support does not have a strong focus on small-scale fisheries**.

⁴⁷ Which must be organised no later than three months after the date of provisional application of the Protocol.

- Considering all planned funding, **artisanal fisheries measures accounted for an important share of total funding**. However, support to artisanal fisheries has been limited as a proportion of the available budgets in Cabo Verde, Gabon, Liberia and Côte d'Ivoire.

Table 6: Focus of sectoral support funding by category and PTC (2015 – 2020)

Category of support	Proportion of total	PTC	Proportion of total
Aquaculture development	10,8%	Cabo Verde	1,5%
Ecosystem protection	1,6%	Comoros	0,7%
Infrastructures	30,7%	Cote d'Ivoire	1,9%
Institutional strengthening	2,2%	Gabon	0,7%
International cooperation	2,0%	Guinea-Bissau	5,1%
Monitoring, control, and surveillance	11,3%	Liberia	0,9%
National fisheries management measures	11,7%	Madagascar	1,4%
Other	0,8%	Mauritania	12,0%
Post-harvest	5,0%	Mauritius	1,2%
Research and collection of scientific data	15,3%	Morocco	53,5%
Safety at sea	5,3%	São Tomé and Príncipe	1,4%
Sanitary control	1,5%	Senegal	2,0%
Vocational training	1,8%	Seychelles	16,9%
Total	100,0%	The Gambia	0,9%
		Total	100,0%

Source: own analysis based on Caillart et al 2023

Table 7: Proportion of sectoral support funding by beneficiary (2015 – 2020)

PTC / beneficiary type	Managing authorities	Research institutes	Operators in the fishing and aquaculture sector	Artisanal fishing communities	Total
Cabo Verde	80%	9%	4%	7%	100%
Comoros	73%			27%	100%
Côte d'Ivoire	61%	33%		6%	100%
Gabon	100%				100%
Guinea-Bissau	77%	11%	2%	10%	100%
Liberia	100%				100%
Madagascar	98%			2%	100%
Mauritania	30%	6%	64%		100%
Mauritius	55%	23%	1%	21%	100%
Morocco	7%	28%	16%	49%	100%
São Tomé and Príncipe	76%			24%	100%
Senegal	45%	16%		39%	100%
Seychelles	39%	2%	19%	40%	100%
The Gambia	52%	2%	5%	41%	100%
Total weighted	27%	18%	20%	36%	100%
Total non-weighted	64%	15%	16%	24%	

Source: own analysis based on Caillart et al 2023.

Our consultations also revealed a high level of support in the sectoral support for funding for activities benefiting small-scale fisheries and food security (see Box 6), despite the fact that recommendations in the Food and Agriculture Organisation (FAO) Voluntary Guidelines for Securing Sustainable Small-Scale Fisheries in the context of food security and poverty eradication⁴⁸ on common activities in support of small-scale fisheries were not structurally and systematically embedded within sectoral support matrices developed by PTCs and approved by the Joint Committees.

Of considerable concern however is our finding from consultations that **sectoral support matrices contain very few activities specifically aimed at addressing gender equity.**

Sectoral support funding provided by SFPAs is not intended to be the sole funding mechanism to implement sectoral policy and can only ever be expected to contribute to the efforts of governments in African PTCs to implement their policy objectives, strategies and programmes. As such, **the content of SFPA sectoral support must be well coordinated with other government and donor support**, to be coherent with government policy, and synergetic rather than duplicative of other donor support. The horizontal evaluation (Caillart et al. 2023) considered the extent to which SFPA sectoral support funding provided synergies and complementarities with development assistance to the fisheries sectors in the PTCs. It found, when considering both regional and national EU development programmes that *'overall, EU interventions under the sectoral support component are assessed to support EU development programmes, and vice versa. There are numerous examples of synergies and complementarities between EU contributions for sectoral support and EU development programmes in the partner third countries.'* This positive finding can be explained by the consultation by DG INTPA with DG MARE when developing multi-annual cooperation programmes with third countries, and by regular consultations between DG MARE, Fisheries Attachés and EU Delegation staff involved in the monitoring of the sectoral support as appropriate.

However, **our consultations found that while coordination between EU institutions may be good, consultation and coordination between all donors is less so**, particularly because of the challenges of ensuring donor coordination between all donors operating in each African PTC. An example is provided in the box below related to The Gambia, with another being the failure/difficulty in Liberia of achieving donor coordination due to a lack of support for doing so from the National Fisheries and Aquaculture Authority (NaFAA).

Box 6: Sectoral support content in The Gambia, Senegal, Mauritania, and Madagascar

In **The Gambia** the content of the sectoral support as it currently stands is highly supportive of small-scale fisheries and food security. Activities and axes are well aligned with national policy which emphasises small-scale fisheries and food security. 56% of funds allocated in the sectoral support provide direct support for small-scale fisheries through activities involving them or infrastructure for their benefit, 59% of funds support management measures and infrastructure which should serve to improve management or post catch handling thus contributing to food security, and 28% of funds allocated are for activities less directly targeted but nevertheless beneficial to either small-scale fisheries or food security. Indicators and targets in the multi-annual and annual sectoral support matrices are not well specified however, and in most cases are qualitative rather than quantitative and thus not easily quantifiable or measurable. With regards to gender, the support matrix is silent on gender issues, with no gender-specific activities itemised and no indicators provided for gender disaggregated data. Additionally, in-country consultations found that a number of activities earmarked for funding in the multi-annual matrix are to be funded by other donor projects, but the sectoral support matrix had not been adjusted accordingly. The risk of duplication by donors of funding for activities contained within the sectoral support matrix

⁴⁸ [SSF Guidelines](#)

and in other programmes is heightened because there is no fisheries sector donor coordination committee in the Gambia.

In **Mauritania**, the on-going Protocol (2021-2026) sets out a specific amount of EUR 16.5 million over 6 years, as support for the implementation of the country's sectoral fisheries policy. The programming process is not yet finalised, as each potential beneficiary institution is yet to identify its needs and the Minister to make the final arbitrage before discussion and approval with/by the EU. It is planned that part of the artisanal landing site 'PK 93 development' project would be financed under the current Protocol sectoral support, with co-funding of EUR 2.5 million from Kreditanstalt für Wiederaufbau – German Development Bank (KfW) for the construction of the Operational and Scientific Complex for the Mauritanian Coastguard and the Fisheries Research Institute (IMROP) foreseen in Nouadhibou. Overall, the content of the sectoral support (as foreseen for the on-going Protocol, and under previous Protocols) is supportive of small-scale fisheries and food security. Areas 2, 5 and 6 of the sectoral support programme are most strongly supportive of food security and account for 31% of total sectoral support funds. Area 7 most directly supportive of small-scale fisheries is not budgeted as such, but part of Area 6⁴⁹ is dedicated to infrastructure linked to small-scale fisheries and accounts for 20% of sectoral support funds.

In **Senegal**, the on-going Protocol (2019-2024) sets out a specific amount of EUR 900 000 per year, as support for the implementation of Senegal's sectoral fisheries policy. A significant part of its envelope is dedicated to activities supportive of artisanal fisheries and food security (respectively 28% and 19%). There are no specific interventions geared towards women, however, women are part of the Conseil Local de Pêche Artisanale / Local Artisanal Fishing Council and therefore the project 'Capacity-building for small-scale fisheries' funded by the sectoral support did involve a certain number of women beneficiaries. Indicators in the sectoral support matrix are not gender disaggregated. Views of industrial and artisanal fisheries stakeholders can be summarized as being generally unsatisfied with the sectoral support, on the basis that they feel the fisheries administration does not take into account their concerns and gives priority to infrastructure funding, to the detriment of the resource management and organizational and institutional strengthening. These stakeholders claim to have repeatedly stressed the low impact of the sectoral support on the development of fisheries in Senegal. However, all the activities financed by the sectoral support are included in the Sectoral Policy and Development Letter for Fisheries and Aquaculture (LPSDPA) and are therefore consistent with the sectoral fisheries policy. Almost all the projects developed under the SFPA sectoral support meet at least one of the potentially desirable outcomes of the SFPA. However, sectoral support funds are used to fund many small projects which spreads resources thinly, rather than focusing on fewer larger and more impactful projects.

In **Madagascar**, the 2023 – 2027 Protocol's sectoral support to the SFPA provides for actions for the implementation of the national development policy (or policies) for fisheries and the blue economy. The annual amount of sectoral support is EUR 1.1 million. The objective is to contribute to a 'responsible and sustainable' development of the fisheries sector. The expected areas of intervention agreed upon by both parties and set in the Protocol are: the implementation of the national tuna fisheries management strategy; support for small-scale and traditional fishing; training of fishers; strengthening fisheries research, capacity to manage marine ecosystems and fishery resources; monitoring, control and surveillance of fishing activities and in particular the fight against illegal, unreported and unregulated fishing; and the safety of fishery products. The programming matrix was developed by the Ministry of Fisheries and the Blue Economy (MPEB) under coordination by the Malagasy Fisheries and Aquaculture Agency (AMPA) early in 2023. The European Commission (DG MARE B3) staff, on behalf of the EU and with the support of the European Union Delegation in Madagascar, collaborated with MPEB to draft it. The axes of

⁴⁹ It includes half the budget for the construction of Tanit port (considering that half the port is dedicated to industrial fishing and the other half to artisanal fisheries).

intervention in the matrix are relevant to the MPEB's objectives to develop the fisheries and the blue economy sectors in Madagascar and both parties appear to have agreed in principle with these differences. For instance, activities to support the National Tuna Fisheries Management Strategy are included within the sectoral support programme. A minimum of 20% of the overall sectoral support are allocated to small-scale fisheries development over the 2023 – 2027 including a pilot project to improve fishing practices in selected villages and value chain development. The current version of the sectoral support matrix provides indicators to monitor success for the 1st implementation year only. To continue to ensure effective implementation, SMART indicators need to be developed for the subsequent years.

3.3 Sectoral support processes

In terms of the processes used to design and implement sectoral support, Caillart et al (2023) report the following findings which are supported/validated by our own consultations:

- Sectoral support **implementing guidelines were approved by Joint Committee meetings** for Côte d'Ivoire, The Gambia, Liberia, Mauritius, Morocco, and Seychelles but not for Cabo Verde, Guinea-Bissau, São Tomé and Príncipe and Senegal. For Madagascar, implementing guidelines are to be approved through a Joint Committee meeting. That adoption of such guidelines appears to becoming more common over time. Uniquely for Mauritania, implementing modalities are detailed in an annex to the Protocol, which gives them a binding force for the two parties.

Our own consultations also highlighted that:

- In almost all countries sectoral support programmes were **not developed in consultation with national small-scale fisher (or other) stakeholders**. Furthermore, processes to involve small scale interests in decision-making, as recommended in the FAO's Voluntary Guidelines for Securing Sustainable Small-Scale Fisheries in the context of food security and poverty eradication⁵⁰ were often not followed. Despite this, small-scale fishers' views are however often implicitly incorporated given that sectoral support programmes implement national sectoral strategies which do involve consultation with stakeholders during their preparation.
- **In many sectoral support programmes indicators and targets included in sectoral support matrices are poorly specified**, are not well linked to activities, are too qualitative, and/or are not easily measurable i.e. indicators are often not specific, measurable, agreed, realistic, and timebound (SMART).

There is a **challenge for implementation in adhering to the programmes for sectoral support agreed at the start of each Protocol, but also a need for flexibility** over the use of funds to respond to emerging needs and agreement over the changes that should occur. The literature suggests that an appropriate balance has not always been the case, with weaknesses highlighted in the literature including:

- the provisions governing amendments to the multi-annual programmes not always being complied, with amendments sometime unilaterally implemented and presented *a posteriori* to the Joint Committee for approval (Caillart et al, 2023).
- Sectoral support funds not being fully used as intended by the PTCs (European Court of Auditors 2015).⁵¹

⁵⁰ [SSF Guidelines](#)

⁵¹ European Court of Auditors: Special Report No 11/2015: Are the Fisheries Partnership Agreements well managed by the Commission? [Link to document](#)

Our own consultations suggest that the degree of flexibility and amendment varies considerably between SFPAs. While proposed amendments are indeed discussed and agreed during Joint Committee meetings, **the extent of modifications is often limited.**

While Joint Committee meetings are used by the EU to remind PTCs of annual reporting requirements, the **requirements for annual and final Protocol reporting are not always fulfilled**, with some PTCs failing to report on all annual tranches of funding, or reports being limited in the information provided. Furthermore, many sectoral support annual reports are of **poor quality**,⁵² Seychelles and Morocco being two notable examples where reporting is good. (Caillart et al. 2023)

With regards to the **utilisation rates of sectoral support funds**, which may to some extent be considered a proxy for how well sectoral support is implemented, the horizontal evaluation noted that:

- For a majority of recently expired Protocols, the total expected financial contribution for sectoral support was paid to the relevant PTC (Cabo Verde, Côte d'Ivoire, Gabon, Madagascar, Mauritius, São Tomé and Príncipe, Senegal, and Seychelles).
- However, for Côte d'Ivoire and Gabon, some funds paid by the EU were expected to be utilised after the expiry of the Protocols (which was allowed if at least 75% of the budget (or other % agreed) was utilised). While in other cases (Guinea-Bissau, Mauritania, Senegal, and Morocco) the PTC did not demonstrate full utilisation of the budget available, and/or did not provide the expected justification for the use of funds, which resulted in the Joint Committee deciding to make partial payments with the remaining amounts being carried over to the next Protocol.

Nevertheless, there have been **no occurrences of EU contributions for sectoral support being decommitted** (i.e. forfeited) for insufficient performances by the PTCs in the implementation of the multi-annual programmes, or for any other reasons.

On the issue of implementation and oversight of sectoral support funding, an important **potential weakness** identified in the horizontal evaluation is a lack of specific/sufficient requirements in the Protocols or implementing sectoral support guidelines **over expenditure verification** of the funds claimed as having been used. While proof of payments may sometimes be required, this is not the case in all SFPAs. More positively on this issue, Caillart et al (2023) report that the multi-annual programmes for Comoros, Madagascar and Seychelles all included financial resources to fund external audits of disbursements under one or several tranches.

Finally with regards to **transparency** over sectoral support, the EU financial contribution and its implementation principles (e.g. priorities, principles governing programming and payments) are publicly available in the Protocols, and findings with regards to sectoral support are contained in the ex-post evaluation. However not made publicly available are the PTC annual and final Protocol sectoral support implementation reports, or the joint committee meeting minutes which contain information on the annual and multi-annual programmes, implementation guidelines, and the rationale for payments. Caillart et al (2023) report that almost all stakeholders consulted in the context of the horizontal evaluation felt that greater transparency (in some form) of these documents would be desirable, and our consultations support this finding.

Box 7: Sectoral support processes in The Gambia and Senegal, Mauritania, and Madagascar

In **The Gambia** small-scale representative organisations such as the Platform of Non-State Actors in Fisheries and Aquaculture of the Gambia (PONSAFAG) (see Section 3 in Annex 6)

⁵² Seychelles has taken the initiative to commission external evaluators to assess implementation of sectoral support funding.

were not involved in developing the multi-annual sectoral support matrix prior to the first Joint Committee meeting in 2019 and agreed by that meeting, and have little knowledge of its contents. Annual implementation reports are not made publicly available, and while small-scale fisheries organisations/fishers are involved in many individual sectoral support activities which have been funded during the first 3 years of the Protocol, there is no annual process/meeting used by the Department of Fisheries to: i) report on implementation of the sectoral support over the previous year; and ii) discuss priorities and the focus of sectoral support activities in the coming year, should activities need to be amended to reflect new/emerging needs. As a result small-scale fishers (and other stakeholders) are currently poorly informed about sectoral support implementation or plans with regards to activities still to be implemented and have little say over them. In-country consultations suggest that the Department of Fisheries is receptive to greater participation and transparency over the planning and use of sectoral support, and that small-scale representative organisations would welcome more involvement.

In **Senegal**, relevant stakeholder groups were not included in defining the sectoral support matrix for the current Protocol. These groups include CONIPAS representing the small scale catching sector, and civil society organisations such as The Association ouest-africaine pour le Développement de la Pêche Artisanale (ADEPA); and the Confédération Africaine des Organisations de la Pêche Artisanale (CAOPA). Previously, negotiations were well prepared (the Presidency, the Ministry of Economy and Finance, Foreign Affairs, stakeholders, research and legal experts were involved and agreed on what should or should not be accepted). Today, a single entity, the MPEM, steers the process from start to finish, with little involvement from the other entities concerned. Communication with stakeholders is weak, in particular those involved in small-scale fishing, about implementation progress. There are no gender specific activities in the sectoral support matrix, and no gender disaggregation of indicators and targets. The sectoral support management procedures reduce the potential for adaptive management/use of funds, and rapid payment of sectoral support tranches of funding, given that changes/payments must be approved through the Joint Committee meetings.

Box 8: Sectoral support processes in Mauritania and Madagascar

In **Mauritania**, there have been significant delays in implementing the sectoral support envelopes during previous Agreements, leading to a delay in the programming of the sectoral support as part of the Protocol to the current SFPA. According to the wishes of the Mauritanian authorities and the EU expressed over several years, the implementation and operationalisation of the 'Sectoral Budget Support Coordination Unit' for the rigorous management and monitoring of the funds and activities financed by it, and more broadly, to ensure coherence with the interventions of other partners, remains on the agenda even though it was created at the end of 2021. The national stakeholders representing the small-scale/artisanal sector were/are not involved or consulted by government, for the design of the multi-annual programme for the sectoral support funding provided under the SFPA, or during its implementation. They wish to be involved in the whole process, to increase the likelihood of the sectoral support being responsive to small-scale fisheries needs. There is no appropriate involvement of small-scale fisheries organisations and their representatives which would ensure consultation/participation with the sub-sector i) during the preparation/negotiation of any future SFPA, ii) during the preparation of the multi-annual matrix and iii) during the Joint Committee meetings. There is no publicly available real-time or periodic reporting on use of sectoral support funds. The EU fisheries attaché based in the European Union Delegation (EUD) in Nouakchott is intensively involved with the MPEM for the preparation of annual sectoral support implementation reports and of subsequent annual plans, which are analysed during the Joint Committee meetings. Overall, small-scale fisheries interests are currently poorly informed about sectoral support implementation or plans with regards to activities still to be implemented, and are hardly involved in their

definition. The MPEM is however receptive to greater participation and transparency over the planning and use of sectoral support.

In **Madagascar**, while civil society and small-scale private sector operators were consulted during the early stages of the SFPA negotiations, they were not extensively involved in the drafting of the sectoral support programme from January 2023 onwards. There are also no clear proposals or agreements by MPEB to ensure regular consultation with the civil society and small-scale fisher representatives, and regular information dissemination around sectoral support implementation.

4. Conclusions

4.1 Linkages between EU fleets and African PTCs

Based on the findings presented in Section 2 and the detailed contents of the country reports in Annex 6 – 9 (which contain country-specific conclusions), generalised **conclusions** can be drawn **about a) the extent of existing linkages**, and **b) whether and how linkages could be increased**.

4.1.1 Landings of EU catches and use by EU vessels of ports in PTCs

1. **Ensuring that catches by EU vessels contribute to food security in African countries is not a directly expressed objective of SFPAs, and indeed may not be desirable.** From the EU perspective the SFPAs are intended to contribute supplies to the EU market, not local markets. And while the underlying premise of this assignment was that increased supplies of EU catches to African PTCs would be desirable from a food security perspective, **many stakeholders question/doubt whether this would in fact be either necessarily beneficial (because of potentially negative impacts on local fishers) or possible.**
2. **Protocols already recognise the different port conditions and onshore processing establishments** present in PTCs and do not include mandated provisions to land where such provisions would/could not be complied with by EU operators or would deter utilisation of fishing opportunities. It is not realistic to expect (either through mandating or incentivising) EU catches to be landed in all the PTCs having an SFPA, due to the strong comparative advantage that some ports have over others as landings hubs for EU vessels, and **including provisions that cannot be complied with, would have negative impacts on the quality of the partnership between the EU and PTCs.**
3. **Landings in the ports of PTCs do not necessarily mean that products landed will contribute to supplying the local markets** (contributing to food security) **or be available to local processing industries** (contributing to value added and employment) if product is exported without being processed. Product that is landed and processed may also be exported and so not available for local consumption. And catch, such as small pelagics or tuna, that is transshipped (i.e. not a landing) creates no/little onshore economic benefit to the African PTCs over and above transshipment fees (but does allow them to engage in inspection of transshipments to ensure compliance with conservation and management measures).
4. **Protocol provisions relate to landings only, not to the sale of catch to local industries or on the local market.** There are no SFPAs mandating sales to local industries, for the reason that it would distort commercial relationships.
5. **The African countries with SFPAs benefitting the most from the linkages between EU vessels and ports and processing facilities in PTCs are Morocco and Mauritania (for small pelagics, demersals and crustaceans), and Cabo Verde, Senegal and Côte d'Ivoire for tuna in the Atlantic Ocean, and Madagascar, Mauritius and Seychelles (all for tuna) in the Indian Ocean.** All these countries have port infrastructure that is capable of servicing large-scale fishing vessels (and/or are well-placed geographically to handle product flows to Europe and/or have a SFPA which mandates landings). In contrast, the Gambia, Gabon, Guinea Bissau, Liberia, São Tomé and Príncipe in the Atlantic, and Comoros in the Indian Ocean, have had little or no linkages with the EU fleet largely due to their poor port infrastructure and services and absence of processing facilities.
6. **It is not necessary for all African countries to have a SFPA to benefit from EU catches** made under them. Ghana and South Africa for example do not have an SFPA with the EU but receive part of EU tuna catches made in the region through SFPAs, with their ports and onshore processing facilities deriving benefits.

7. **Around a total of 7 500 tonnes of catch made under SFPAs is destined for direct final sale in the same PTC having that SFPA** (c.a. 5-6 000 tonnes of tuna bycatch not sold to canneries, and around 2 000 tonnes of small pelagics in Mauritania). An estimated 27 000 tonnes of EU catches annually from SFPAs supply domestic markets in all the African PTCs.
8. **More than 90% of all catches made under SFPAs between the EU and African PTCs are destined for the EU market.** However considerable volumes (c.a. 200 000 tonnes) of small pelagics caught in Mauritania and Morocco by EU vessels fishing under the SFPAs and in European waters are destined for sale in other African countries without an SFPA.
9. **Sale of bycatch (at current levels, or if increased in the future) from EU vessels (e.g. demersal trawl bycatch, tuna bycatch) on local markets is generally assessed as positive** in terms of making a contribution to local food security and employment of local traders and processors (many of whom tend to be women). While not quantified or fully understood during this assignment, **there may however be risks of such landings** distorting local markets and negatively impacting on market prices for fish caught by local fishermen.
10. **Critical factors for EU vessels impacting their interest and ability to land catch in specific ports of PTCs** are:
 - the location of catches and how close fishing grounds are at different times of the year to different ports.
 - the opportunities and abilities of PTCs to export fish to the EU market based on their compliance with EU requirements on fish hygiene/food safety and IUU fishing, and/or tariff/quota arrangements.
 - the status and condition of port infrastructure and services e.g. quays, lack of congestion to allow fast turnaround times, bunkering, quality, timeliness and price of port services.
11. **Additional factors for EU vessels also impacting their interest to sell catch in specific ports of PTCs** are:
 - the presence of onshore processing industries with the capacity to process part of their landings, and which pay within a reasonable time and provide for rapid weighing by species.
 - the prices paid for fish in PTCs as compared to in other ports and/or by other international buyers.
12. Some longline, demersal and small pelagic catches are landed in the Canary Islands due to processing and port infrastructure, costs, and market links in Las Palmas, which are hard for African PTCs to compete with. For tuna purse seine catches, as well as for other catches of longline tuna, demersals and small pelagics, **EU catches are already generally landed or transshipped in ports in African PTCs based on established relationships, competitive advantages of different ports and trade flows to end markets.** While African PTCs which do not benefit from landings of EU catches may have an interest in attracting greater landings, **disrupting historical patterns of landings and market dynamics could require very significant investments in port and processing infrastructure and be difficult to achieve.**
13. Because total volumes of EU catches caught under SFPAs are determined/limited by resource availability (along with the fishing opportunities provided), **without an increase in overall catches any increase in total EU catches landed, processed or transshipped in one African PTC would likely be at the expense of another African PTC, displacing the benefits between African PTCs without generating any net additional benefits** to the continent.
14. **Improved resource availability for species caught by EU vessels could/would result in greater catches and therefore potentially greater landings and linkages** between EU vessels and African PTCs in terms of contributions to food

security, value-added and employment in PTCs. Improved resource management could be particularly relevant for non-tuna species which are part of multi-species agreements, given that the concept of ‘surplus’ does not apply to highly migratory species,⁵³ and the fact that the science needed to better assess the status of stocks is often lacking for these species. This is potentially important because without an increase in overall catches any increase in total EU catches landed, processed or transhipped in one African PTC would likely be at the expense of another African PTC.

4.1.2 Employment of nationals from PTCs on EU vessels

1. There are (recent strikes notwithstanding - see below) generally no **difficulties in identifying and finding properly trained and willing seamen from Morocco, Mauritania, Senegal, and Côte d'Ivoire** to work on EU vessels, but in other countries trained and willing crew are often lacking. A lack of training institutes or funding for the training of crew from PTCs may be hindering employment for nationals from PTCs on EU vessels. **Increased training and certification aligned with the international standards of the IMO of potential crew from African PTCs may therefore be beneficial.**
2. **Unless overall employment of ACP nationals on EU vessels increases**, efforts to train crew in specific African PTCs may generate employment for them at the expense of other African PTC nationals. **This would cause a displacement of employment opportunities rather than an overall increase but would result in more equitable distribution of the employment created between PTCs.**
3. Given that Protocols specify crewing requirements by nationality, **a change in the proportion/number of crew required from ACP countries in the Protocols may generate increased employment on EU vessels for African PTC nationals, however may not be advisable**, because: i) there are limits to the number of ACP crew that could be employed; ii) increases in ACP crewing requirements could increase the risk of lower interest by EU vessels in SFPAs; and iii) EU SFPAs are already generally aligned with the obligations imposed on other foreign fleets.
4. **Working conditions on board EU fishing vessels for PTC nationals** are in general good with wages in compliance with the Protocol terms, which are based on the International Labour Organisation (ILO) Principles and other ILO provisions. Weaknesses and therefore room for improvements may however still exist as reflected in the recent strike by Ivorian and Senegalese seafarers employed on EU purse seiners operating in the Atlantic and Indian oceans. Improvements could serve to increase the number of crew from African PTCs willing to work on EU vessels.

4.2 Sectoral support to PTCs

Based on the findings presented in Section 3, **conclusions** can be drawn about a) **the focus/content of sectoral support**, and b) **the processes involved with design and implementation**.

4.2.1 Sectoral support content and processes

In terms of sectoral support **content**:

1. The CFP (Article 32.1 and 32.2) does not have a specific objective or requirement to target small-scale fisheries. Nevertheless, **sectoral support in many SFPAs has a strong focus on small-scale fisheries and food security. There are however significant differences between countries, and for some countries** (Cabo Verde,

⁵³ The surplus concept is not applicable to tuna and tuna-like species which are highly migratory and mainly found in areas beyond national jurisdictions (Caillart et al. 2023).

Gabon, Liberia and Côte d'Ivoire) **sectoral support does not have a strong focus on small-scale fisheries.**

2. **PTCs lead the programme process but are often poorly-equipped in terms of capacity and experience to develop sufficiently robust sectoral support programmes** which have a strong intervention logic and which appropriately specify SMART indicators and targets. Weaknesses in indicators undermine the usefulness of sectoral support matrices for subsequent monitoring of sectoral support activities and evaluation of their effectiveness.
3. **Low levels of engagement of small-scale fisheries and women's interests** in the planning of sectoral support may suggest that **sectoral support content is not fully optimal in terms of meeting their real needs and interests.**
4. **The lack of activities specifically intended to support gender equity is a recurrent weakness in many sectoral support programmes**, as is the **absence of gender disaggregated data** for the indicators and targets specified in many sectoral support matrices.
5. **Multi-annual programmes for some but not all countries include financial resources to fund external audits** of disbursements.

With regards to sectoral support **processes**:

1. **Implementation progress of sectoral support is not shared/communicated in many countries, reducing visibility for the EU and PTC governments** about many beneficial activities and steps that are enabled through the sectoral support funding, **and reducing potentially useful input from stakeholders** to improve the implementation of sectoral support during Protocols.
2. **Governments in African PTCs appear receptive to greater levels of consultation with and involvement by stakeholders** in the planning and implementation of sectoral support, suggesting that weaknesses in existing processes could be easily corrected. This could involve a more structured and coordinated process to involve stakeholders in planning sectoral support, and in inputting to changes/adjustments made to sectoral support programmes during Protocols.
3. **While coordination between EU institutions over the content of sectoral support is good, wider coordination between all donors in many African PTCs is less frequent**, and many countries do not have regular fisheries sector donor coordination meetings (either involving government institutions or not). This increases the risk of duplication of donor activities with sectoral support activities or inefficient expenditure.
4. **Joint Committees typically rely on financial utilisation of the EU contribution as the indicator of performance** of the sectoral support programme, rather than considering the actual outcomes (due to poor specification of multi-annual sectoral support matrices).
5. **Full utilisation of sectoral support funding within the expected periods does not always take place, implying inefficiencies or problems related to programming and implementation** of the sectoral support funding.
6. **The quality and timeliness of PTC annual implementation reports could in many cases be improved.**
7. While the Protocols allow for the multi-annual matrix to be adjusted during the Joint Committee meetings or through an exchange of letters based on emerging/changing needs, **changes to sectoral support matrices made during Protocols are often minor**, which may not be optimal given the relatively long periods over which Protocols last (typically 4-6 years) which may imply significantly changing needs.

5. Recommendations

This final section of the report provides a set of targeted recommendations. While most recommendations are relevant and targeted at international development partners given the interests of BMZ as the funder of this assignment, it is considered appropriate to target some at the EU and PTC governments.

The recommendations proposed are of course non-binding on those to which they are targeted. However, the recommendations proposed may be considered relevant and acceptable given that:

1. many are generalised from conclusions and recommendations which were discussed and agreed with stakeholders during national workshops held in The Gambia, Mauritania, and Madagascar;⁵⁴
2. they are based and build on the evidence and findings presented in Section 2 and 3, and the conclusions flowing from them as presented in Section 4; and
3. they were discussed and validated at a stakeholder workshop held in Brussels in October 2023 which involved a wide range of relevant stakeholders (see Annex 5).

The country reports provided in Annex 6, Error! Reference source not found., and Error! Reference source not found. provide additional recommendations specific to those countries as discussed and validated at the national workshops.⁵⁵

The reader is reminded that the **recommendations relate to the primary research questions for this assignment** as presented again below **and are not intended to cover all aspects of SFPAs.**

1. How to ensure increased levels of benefits from EU fleet activities in African countries, in terms of fish landings and employment, and contributions to food security and national socio-economic benefits?
2. How to design and implement the sectoral support component of SFPAs most effectively, in particular to support small-scale fisheries, gender equity and food security?
3. How to ensure that complementary activities by donors/development partners can contribute to maximising the benefits of the SFPAs?

5.1 To increase beneficial linkages between EU fleets and African PTCs

The EU and African partner third countries should:

1. Continue to critically assess on a SFPA-by-SFPA and a species-specific basis the extent to which mandating or incentivising a part of landings is appropriate, and where possible and relevant to do so, include relevant provisions in future Protocols. Assessments should consider the conditions present in different PTCs, and the risks of displacement of benefits between PTCs and impacts on domestic markets.
2. Use the strength of the partnership between the EU and PTCs to ensure non-EU foreign-flagged vessels (or those with foreign beneficial ownership which are locally flagged⁵⁶) are subject to sufficient control and surveillance and that combined vessel numbers do not negatively impact on resources available for catch by local fleets,

⁵⁴ National workshops involved governments, local private sector stakeholders, donors including the EU, and civil society organisations.

⁵⁵ There was no national workshop conducted in Senegal (see Annex 9).

⁵⁶ Note that vessels flagged in African PTCs but with foreign beneficial ownership are not subject to conditions of non-discrimination between them and EU fleets.

and do not negatively impact on the linkages between EU fleets and PTCs through their negative impacts on EU vessel catches.

3. Continue to critically assess the requirements in Protocols for EU vessels to use seamen from African PTCs as crew. Assessments should take into account the existence of suitably qualified personnel in different African countries, the location of EU vessel landings, the potential (and risks) to increase the number of crew required to be from ACP countries and/or specific PTCs, and the risk of displacement of crewing opportunities from some PTCs to others.
4. Continue to provide support for research, management and enforcement activities, especially for non-tuna species (given that research and management arrangements for tuna are generally more advanced), which can contribute to resource improvements, catches, and potentially therefore greater landings by EU vessels in PTCs.
5. Support continued improvements in the working and employment conditions of seamen from African PTCs working on EU vessels through enforcement of the social clause in Protocols.
6. PTCs should ensure that clauses of Protocols related to observers are adhered to, that observers are deployed as intended, and that observer salaries are paid on time.

International development partners should as part of their future development programmes and assistance.⁵⁷

1. Support improved resource management through the provision of funding for research and enforcement activities to maintain and rebuild stocks, particularly for non-tuna species which are part of multi-species agreements. Effort should be on appropriate interventions (research, enforcement) to maintain and rebuild stocks, which can allow for greater levels of catches in the EEZs of PTCs, part of which are landed in the PTCs for local consumption, processing and/or export.
2. Fund a comparative assessment of port infrastructure and services in all African PTCs and other African countries in a position to receive catch from EU vessels, to ensure that African ports are competitive, and meet the current and future needs of visiting foreign vessels. Such an assessment could focus on those countries which do not currently receive landings or port visits but could also include those that do to ensure that ports are/remain fit for the future in terms of meeting the needs of EU and other vessels. The assessment could review and assess the availability, costs, and timely delivery of required port infrastructure and services, and make recommendations about improvements that could be made and the investment requirements that would be necessary.
3. Fund market strategies to facilitate and promote the sale of high value species in African PTCs, where such strategies are certain not to pose a risk to local catching sectors in terms of competition. Strategies for PTCs with mixed species SFPAs covering demersal and catches of other high value species could attract sales from EU vessels, if based on detailed understanding of EU interests. However, such strategies would need to carefully consider any potential competition with local fleets also trying to supply the same local markets.
4. Provide technical assistance and funding to help African PTCs comply with EU sanitary standards and having competent authorities approved, where not already the case and where exports to the EU are considered a realistic possibility.
5. Support investigations and provide equipment and infrastructure in selected African PTCs (those with mixed species agreements and those receiving tuna bycatch) to

⁵⁷ where sectoral support programmes do not provide for sufficient funding to meet all needs.

enable them to [better] utilise and add value to bycatch, and to use low value species for human consumption rather than as fish meal.⁵⁸

6. Provide funding for enhancing capacities of PTCs to train crew and observers in line with international standards. This could involve both funding for existing training programmes, as well as capacity building and support for training schools (training of trainers, provision of training equipment/facilities, etc).

5.2 To increase the benefits to African PTCs from sectoral support

The EU and African partner third countries should:

1. Ensure that representative organisations for small-scale fishers and women (and indeed for all private sector and NGO stakeholders) are involved in development of the multi-annual sectoral support programmes/matrices which are prepared for discussion and approval at the first Joint Committee meeting.
2. Make the sectoral support annual implementation reports and relevant parts of Joint Committee meeting minutes public, and disseminate key findings from them through appropriate national level consultations events (e.g. annual stakeholder meetings).
3. Systematically use and refer to the FAO's Voluntary Guidelines for Securing Sustainable Small-Scale Fisheries in the context of food security and poverty eradication as a way of increasing small-scale fishers in decision-making and making sure their interests continue to be reflected in the sectoral support programmes.
4. Adopt a more gender inclusive approach to the planning of sectoral support, include gender disaggregated data into indicators and targets specified within multi-annual sectoral support matrices, and ensure that sectoral support programmes include activities specifically targeted at gender equity.
5. Include funding in sectoral support programmes for external audits of disbursements and/or allow independent audits by third parties.
6. Consider whether a set of standardised indicators could be developed and used across all SFPAs to allow for aggregation of outputs and results.

International development partners should:⁵⁹

1. Provide support (technical and financial) for mobilising consultation by PTC governments with small-scale fisher and women's groups to ensure their views and needs are reflected in the proposals for the sectoral support developed by PTCs prior to the first Joint Committee meeting.
2. Develop a 'toolbox', manual and guides to aid PTC governments with the development and implementation of sectoral support, in terms of both sectoral support processes and content.
3. Support PTCs through the provision of suitable technical expertise (including in monitoring and evaluation, small-scale fisheries and gender issues) in the identification of the multiannual programme (needs, objectives, activities, logframe, M&E, matrix, risks, etc) for approval by the first Joint Committee meeting (potentially using the toolbox and manual proposed above). This support should focus on ensuring that programming is robust, that indicators are SMART and well specified (and include gender specific data), and that they are supportive of small-scale fisheries, gender equity, and food security.

⁵⁸ The on-going EUR 19 million KfW Project 'Promotion of value chains and employment in Mauritania's fishery sector' aims at being a catalyst and accelerator in the transition process of 'less small pelagics channeled to fishmeal, more fish for human consumption' by acting on vocational training and access to finance.

⁵⁹ where sectoral support programmes do not provide for sufficient funding to meet all needs

4. Provide technical support to PTCs in the preparation of annual implementation reports and where necessary proposals for sectoral support matrix revisions to be submitted to the JCs (potentially using the toolbox and manual proposed above).
5. Facilitate and participate in national level donor coordination committees to take place at appropriate intervals (e.g. every 4-6 months) to ensure coordination and coherence between SFPA sectoral support and other donor activities.
6. Coordinate at the international level, for example through the African Union or sub-continental groupings (such as the Economic Community of West African States [ECOWAS]), to ensure that fisheries or other human resource capacity development programmes are cognisant of SFPAs and their requirements for good implementation of sectoral support programmes. This could for example include high level political commitments or memorandums of understanding stating that support to different countries should be integrated and coherent with SFPA sectoral support and include the provision of training to aid PTCs with the development and implementation of sectoral support programmes.

Annex 1: Research brief

Potentials of EU Sustainable Fisheries Partnership Agreements (SFPAs) and development cooperation for the sustainable development of local fisheries sectors **Short Description/Goals**

Assess the potential 1) of enhanced landing and processing of catches of the EU fleet within the framework of Sustainable Fisheries Partnership Agreements (SFPAs) with African countries and 2) of a better integration of SFPAs and international cooperation projects for the sustainable development of local fisheries sectors.

Research Content:

The EU has signed agreements with third countries since the 1970s so that their vessels have access to that part of the fishery stocks that the local fishing fleet of the coastal states do not or cannot use. There are currently (2022) ten active fisheries partnership agreements with African countries in place (Côte d'Ivoire, Gambia, Guinea-Bissau, Cabo Verde, Morocco, Mauritania, Mauritius, São Tomé and Príncipe, Senegal, Seychelles). Payments to the partner countries for these amount to around € 135 million per year plus the payments made by the fishing industry. From a development cooperation and sustainability perspective a critical point is that a lot of the fish caught under these agreements is transported to Europe as raw material without creating local value added. In countries where the fish is landed, the fish is often either transported unprocessed overland (e.g. Morocco) or the processing is in the hands of large international corporations (e.g. Seychelles). A pilot project in Côte d'Ivoire, where local women's groups process small or otherwise inferior tuna, is a good example of how these agreements could be better used for local development.

Research questions:

- How do value / supply chains of catches from SFPAs currently look like for the different agreements? How do the payments through the SFPAs contribute to the sustainable development of the local fisheries sectors?
- From the point of view of the EU fishing industry, what are the interests and opportunities for more landings and further processing of catches on site and what are the perceived obstacles?
- In which third countries is there interest and potential for increased landings and further processing of catches? What would be the expected gains in terms of jobs and incomes as well as local food security? What are important implementation barriers and support needs? What could be the contribution of the SFPA sectoral support payments? What are promising links to international cooperation projects?

Envisaged benefits:

- Strengthen the development cooperation and sustainability aspects of SFPAs.
- The EU has just started a review of the Common Fisheries Policy (CFP), which will last until mid-2022. A study on SFPAs at this point would be timely to feed into this process.
- By identifying potentials, barriers and possible synergies it is possible to determine priorities and possible entry points for an effective expansion of the development cooperation fisheries portfolio and to improve the interlinkage of fisheries policy and development cooperation.
- There is a high level of public interest in the fishing activities of the EU fleet in African waters. Improving the SFPAs adds to the credibility of the European fisheries policy.

The research approach is ideally a combination of economic and other social science approaches. Data collection (e.g. interviews, statistics) both with the European fishing industry and in African partner countries. Possibly a two-step approach with an overall evaluation of SFPA's potential to increase local added value, and then focus on case studies. Special consideration of gender issues, since women often store, process and sell fishery products disproportionately. Regarding the case studies, the research project can build on existing analyses, but it should go beyond the existing knowledge by collecting own data, conducting comparative and integrated analysis and providing evidence-based concrete policy recommendations on how to improve SFPA value chains in the future. Important sources include the ex-post / ex-ante analyses that are carried out before and after the conclusion of Protocols to SFPAs, the analysis of the EU Horizon 2020 FarFish project of four SFPA value chains, and data and reports from the relevant Regional Fisheries Organisations. Potentially important partners include the Joint Research Committees and the Long Distance Advisory Council. In order to ensure close integration with civil society actors, the involvement of local actors and the scientific quality of the project, a small committee of 2-4 researchers and civil society actors could be installed to support the research project at critical points in time. This could include the Coalition for Fair Fisheries Agreements (CFFA).

Annex 2: Advisory Committee Members

The AC was established during the inception phase of the assignment and is composed of the following individuals:

- Mrs. Annira Busch, Senior Policy Officer, Division Food and nutrition security, fisheries, BMZ.
- Dr. Nina Neubecker, Senior Policy Officer, Division Food and nutrition security, fisheries, BMZ.
- Dr. Anneli Ehlers, leader of component 'Fisheries and Aquaculture' Sector Project Food and Nutrition Security, Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH.
- Dr. Stephanie Czudaj, Advisor, Sector Project Food and Nutrition Security, Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH.
- Dr. Amadou Tall, representative of the Directorate for Agriculture and Rural Development, The Economic Community of West African States (ECOWAS)
- Mrs. Beatrice Gorez, Coordinator, Coalition for Fair Fisheries Agreements (CFFA).
- Mrs. Merete Tandstad, Food and Agriculture Organisation (FAO) of the United Nations.
- Mr. Gaoussou Gueye, President of African Confederation of Artisanal Fisheries Organisations (CAOPA) and Coordinator of Afrifish.
- Mr. Francisco Marí, Senior Policy Officer World Food Security, Agritrade and Maritime Policy, Brot für die Welt (Bread for the World), Protestant Agency for Diakonie and Development.

Annex 3: Remote stakeholder consultation

Key to tables below

CS	civil society
EU	European Union
FA	fisheries attaché
GA	government administration
I	International
PS	public sector
PTC	partner third country
TU	trade union

Stakeholders in charge of the implementation of SFPAs

Stakeholders impacted by SFPAs

Stakeholders with an interest in SFPAs

General list of consultees and respondents

#	Type	Country	Location	Group of stakeholders	Name	Response
1	FA	EEAS	EU	1	Attaché pêche Maroc Golfe de Guinée	
2	FA	EEAS	EU	1	Attaché pêche Sénégal Gambie Guinée Bissau	Y
3	FA	EEAS	EU	1	Attaché pêche Côte d'Ivoire and Eastern Africa (based in Kenya)	Y
4	FA	EEAS	EU	1	Attaché pêche Madagascar, Maurice, Seychelles, Mozambique et Comores	Y
5	FA	EEAS	EU	1	Attaché pêche Mauritanie Libéria Cap Vert	Y
6	GA	France	EU	1	DG AMPA	
7	GA	Germany	EU	1	Federal Ministry of Food and Agriculture, Management and Control of Sea Fisheries (unit 614)	Y
8	GA	Greece	EU	1	Ministry of Rural Dev. & Food - Directorate of Fisheries Policy & Dev. of Fishery Products - Dept. of CFP & CMO	Y
9	GA	Italy	EU	1	<i>Ministero Politiche Agricole Alimentari e Forestali, Direzione Generale della pesca Marittima e dell'Acquacoltura</i>	Y
10	GA	Latvia	EU	1	Ministry of Agriculture, Fishery Department, Fishery Strategy Division	Y
11	GA	Lithuania	EU	1	Ministry of Agriculture	
12	GA	Netherlands	EU	1	Ministry of Agriculture Nature and Food Quality, Fisheries Department	
13	GA	Poland	EU	1	Ministry in charge of fisheries, fisheries department (<i>Ministerstwa Gospodarki Morskiej i Żeglugi Śródlądowej, Departament Rybołówstwa</i>)	Y
14	GA	Portugal	EU	1	DGRM - <i>Direcção Geral dos Recursos Naturais, Segurança e Serviços Marítimos</i> - External Resources Unit	
15	GA	Spain	EU	1	MAPA - International Fisheries Relations Dept.	
16	PS	France	EU	2	Orthongel	Y
17	PS	France - EU OR La Réunion	EU	2	ARIPA	
18	PS	Greece	EU	2	ANASTASAKIS GROUP OF COMPANIES	
19	PS	International	EU	2	AIPCE - CEP (EU Fish Processors and Traders Association) and CEP (European Federation of National Organizations of Importers and Exporters of Fish)	
20	PS	International	EU	2	Europeche	Y
21	PS	International	EU	2	ETF - European Transport Workers' Federation	Y
22	PS	International	EU	2	ITF - International Transport Workers' Federation	

#	Type	Country	Location	Group of stakeholders	Name	Response
23	PS	Italy	EU	2	Italfish - Individual company	
24	PS	Italy	EU	2	FEDERPESCA - fishers association	
25	PS	Italy	EU	2	FEDERCOOPESCA - fishers association	
26	PS	International	EU	2	PFA - Pelagic Freezer Association	
27	PS	Poland	EU	2	NAPO - North Atlantic Producers Organisation	
28	PS	Spain	EU	2	ARPOAN (member of ARVI)	
29	PS	Spain	EU	2	ARVI - Cooperativa de Armadores del Puerto de Vigo - ARVI (members ANAMER ANAVAR ANAPA ARPOAN)	
30	PS	Spain	EU	2	ANACEF (PO)	Y
31	PS	Spain	EU	2	OPROMAR	
32	PS	Spain	EU	2	OPNAPA-88 - Organización de Productores Nacional de Palangre de Altura (Vigo)	
33	PS	Spain	EU	2	ORPAGU	Y
34	PS	Spain	EU	2	OPPC-3 OP CONGELADORES DE MERLÚCIDOS CEFALÓPODOS	
35	PS	Spain	EU	2	ANABAC	
36	PS	Spain	EU	2	Dakar Tuna	Y
37	PS	Spain	EU	2	ORPAL	
38	PS	Spain	EU	2	OPAGAC	
39	PS	Spain	EU	2	OPP-07-LUGO (PO)	
40	PS	Spain	EU	2	Cofradía – fishers association - San Ginés (Canary Islands)	Y
41	PS	Spain	EU	2	Cofradía – fishers association - de La Graciosa (Canary Islands)	
42	PS	Spain	EU	2	Cofradía – fishers association - Barbate	
43	PS	Spain	EU	2	Cofradía – fishers association - Conil	
44	PS	Spain	EU	2	Cepesca	
45	PS	Spain	EU	2	ANAMAR	
46	CS	International	EU	3	The Nature Conservancy	
47	CS	International	EU	3	EJF - Environmental Justice Foundation	Y
48	CS	International	EU	3	World Wildlife Fund (WWF) - European Policy Office	Y
49	CS	International	EU	3	CFFA - CAPE - Coalition pour des Accords de Pêche Equitables	Y
50	CS	International	EU	3	Pew	Y
51	CS	International	EU	3	Oceana	Y

#	Type	Country	Location	Group of stakeholders	Name	Response
52	CS	International	EU	3	LDAC - Long Distance Advisory Council	
53	GA	Cabo Verde	PTC	1	Ministry in charge of fisheries - <i>Ministério da Economia Marítima</i>	
54	GA	Côte d'Ivoire	PTC	1	MIRAH - <i>Ministère des Ressources Animales et Halieutiques</i> , ministry in charge of fisheries	Y
55	GA	Gabon	PTC	1	Ministère de l'Agriculture, de l'Élevage, de la Pêche et de l'Alimentation	
56	GA	Gambia	PTC	1	Ministry of Fisheries , Water Resources and National Assembly Matters	
57	GA	Guinea-Bissau	PTC	1	<i>Ministério das Pescas</i> , Ministry of fisheries	
58	GA	Liberia	PTC	1	National Fisheries and Aquaculture Authority (NaFAA)	
59	GA	Madagascar	PTC	1	MAEP - Ministère de l'agriculture, de l'élevage et de la pêche	
60	GA	Mauritania	PTC	1	MPEM <i>Ministère de la pêche et de l'économie maritime</i> - through the DGERH	Y
61	GA	Mauritania	PTC	1	MPEM <i>Ministère de la pêche et de l'économie maritime</i> - through the unit of monitoring - evaluation of the SFPA sectoral support	
62	GA	Mauritius	PTC	1	Ministry of Blue Economy and Fisheries	
63	GA	Morocco	PTC	1	Ministère de l'Agriculture, de la Pêche Maritime, du Développement Rural et des Eaux et Forêts, Département de la Pêche Maritime	
64	GA	Sao Tome y Principe	PTC	1	Fisheries directorate	
65	GA	Senegal	PTC	1	Ministry of fisheries and maritime economy, Maritime fisheries Directorate (<i>Direction de la pêche maritime</i>)	
66	GA	Seychelles	PTC	1	Ministry of Fisheries and Blue Economy, Seychelles Fishing Authority (SFA)	
67	PS	Cabo Verde	PTC	2	APESC - Ship- owners association	
68	PS	Cabo Verde	PTC	2	Artisanal Fishermen Association of S.Pedro	
69	PS	Côte d'Ivoire	PTC	2	USCOFEP-CI - Union des Sociétés Coopératives de Femmes dans la Pêche et assimilées de Côte d'Ivoire	
70	PS	Côte d'Ivoire	PTC	2	UAPF - Union des armateurs de pêche fraîche (Côte d'Ivoire)	
71	PS	Côte d'Ivoire	PTC	2	FENASCOPECI – Fédération nationale des sociétés coopératives de pêche en Côte d'Ivoire (note: FENASCOOP-CI is a different organisation)	
72	PS	Côte d'Ivoire	PTC	2	SYMAPECI - syndicat des marins pêcheurs de Côte d'Ivoire (membre de la GGSTCI (confédération générale syndicale des travailleurs de Côte d'Ivoire)	Y
73	PS	Côte d'Ivoire	PTC	2	SYMICOMOOPPA – syndicat des marins ivoiriens au commerce offshore, onshore, plongeurs, pêcheurs et assimilés	

#	Type	Country	Location	Group of stakeholders	Name	Response
74	PS	Gabon	PTC	2	SAPEG - Syndicat des Armateurs Industriels au Gabon	
75	PS	Gabon	PTC	2	Union of women fishmongers	
76	PS	Gabon	PTC	2	Fishers cooperative	Y
77	PS	Gambia	PTC	2	Consortium of Artisanal Fisheries Professional Organisations (National Ass. of Artisanal Fisheries Operators (NAAFO), ALL Artisanal Fisheries Cooperative Ass. (AFICOSA))	Y
78	PS	Gambia	PTC	2	The Association of Gambian Fishing Companies (TAGFC)	
79	PS	Gambia	PTC	2	Association of Gambian Sailors	
80	PS	Guinea-Bissau	PTC	2	ANAPA - Association Nationale des Entreprises de Pêche	
81	PS	Guinea-Bissau	PTC	2	ANEP - Associação Nacional de Empresários de Pesca	
82	PS	International	PTC	2	FPAOI - <i>Fédération des pêcheurs artisanaux de l'océan Indien</i>	Y
83	PS	Liberia	PTC	2	Liberian Artisanal Fishermen Association (LAFA)	
84	PS	Madagascar	PTC	2	Réseau National des Femmes de la Pêche à Madagascar (RENAFEP MADA)	Y
85	PS	Madagascar	PTC	2	GAPCM - <i>Groupement des Armateurs à la Pêche Crevetrière de Madagascar</i>	
86	PS	Madagascar	PTC	2	SYGMMA - trade union (member of ITF)	Y
87	PS	Madagascar	PTC	2	FECTRAMA/FECMAMA (SEKRIMA) - FECTRAMA : FÉdération Chrétienne des TRAnsports de Madagascar; FECMAMA : FÉdération Chrétienne des MARins de Madagascar; SEKRIMA : SEndika KRIsTianina MALagasy ou Confédération chrétienne des syndicats malgaches	
88	PS	Mauritania	PTC	2	FNPA - <i>Fédération nationale de la pêche artisanale</i> national artisanal fisheries federation	Y
89	PS	Mauritania	PTC	2	FNP - <i>Fédération nationale des pêches</i> national fisheries federation	
90	PS	Mauritania	PTC	2	Fédération de la pêche artisanale et côtière de Nouadhibou	
91	PS	Mauritius	PTC	2	Mauritius Exporter Association (MEXA)	
92	PS	Mauritius	PTC	2	Mauritius Fishermen's Cooperative Federation Ltd	
93	PS	Mauritius	PTC	2	Professional Seafarers Unions	
94	PS	Mauritius	PTC	2	Fishermen Union	Y
95	PS	Morocco	PTC	2	FPM - Federation of maritime fisheries - <i>Fédération des pêches maritimes auprès de la CGEM - Confédération Générale des entreprises du Maroc</i>	
96	PS	Morocco	PTC	2	FCPM - Federation of maritime fisheries chambers <i>Fédération des chambres des pêches maritimes</i>	
97	PS	Morocco	PTC	2	CNPC - National confederation of coastal fisheries <i>Confédération Nationale de la Pêche Côtière</i>	
98	PS	Senegal	PTC	2	CAOPA African confederation of artisanal fisheries. professional organisations	
99	PS	Senegal	PTC	2	GAIPES <i>Groupement des Armateurs et Industriels de le Pêche du Sénégal</i>	Y

#	Type	Country	Location	Group of stakeholders	Name	Response
100	PS	Senegal	PTC	2	UPAMES Employer's union of wholesalers and exporters of. Senegal	
101	PS	Senegal	PTC	2	CONIPAS - Conseil National Interprofessionnel de la Pêche Artisanale	Y
102	PS	Senegal	PTC	2	UDTS - Union Démocratique des Travailleurs du Sénégal	
103	PS	Seychelles	PTC	2	Seychelles Fishing Boat Owners Association	
104	CS	Cabo Verde	PTC	3	ADAD - Associação para a Defesa do Ambiente e Desenvolvimento	Y
105	CS	Cabo Verde	PTC	3	Biosfera	
106	CS	Gambia	PTC	3	Gambia Artisanal Fisheries Development Agency (GAMFIDA)	
107	CS	Guinea-Bissau	PTC	3	Mouvement National de la Société Civile	
108	CS	International	I	3	PRCM - Regional Partnership for Coastal and Marine Conservation	
109	CS	International	I	3	Blue Ventures	Y
110	CS	International	PTC	3	SANSAFA - Southern African Regional Non-State Platform in Fisheries and Aquaculture	
111	CS	International	I	3	Bloom	
112	CS	International	I	3	ICSF - International Collective in Support of Fishworkers	
113	CS	International	PTC	3	AWFISHNET - African Women Fish Processors and Traders Network	Y
114	CS	International and Gabon	PTC	3	WCS	
115	CS	Madagascar	PTC	3	Durrell - ONG pêche continentale	Y
116	CS	Mauritania	PTC	3	Mauritanie 2000	Y
117	CS	Sao Tome y Principe	PTC	3	MARAPA	Y
118	CS	Sao Tome y Principe	PTC	3	FONG-São Tomé-et-Príncipe -Federação das ONG's em São Tomé e Príncipe	

Annex 4: Literature

Literature reviewed as part of the horizontal evaluation or during this assignment

Key policy documents

COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS on External Dimension of the Common Fisheries Policy. (COM/2011/0424 final) [Link to document](#)

Council conclusions on a Communication from the Commission on an integrated framework for fisheries partnership agreements with third countries (2004) [Link to document](#)

Council conclusions on a Communication from the Commission on the External dimension of the Common Fisheries Policy (2012) [Link to document](#)

European Parliament report on the external dimension of the Common Fisheries Policy Procedure 2011/2318 INI (2012) [Link to document](#)

REPORT FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT AND THE COUNCIL on the application of Council Regulation (EC) No 1005/2008 establishing a community system to prevent, deter and eliminate illegal, unreported and unregulated (IUU) fishing (the IUU Regulation). COM/2020/772 final [Link to document](#)

International ocean governance: an agenda for the future of our oceans (JOIN/2016/049 final) [Link to document](#)

Improving International Ocean Governance – Two years of progress (JOIN/2019/4 final) [Link to document](#) – accompanying SWD(2019) 104 [Link to document](#)

COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE EUROPEAN COUNCIL, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS The European Green Deal. COM/2019/640 final. [Link to document](#)

COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS A Farm to Fork Strategy for a fair, healthy and environmentally-friendly food system. COM/2020/381 final. [Link to document](#)

COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS EU Biodiversity Strategy for 2030 Bringing nature back into our lives. COM/2020/380 final [Link to document](#)

COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS on a new approach for a sustainable blue economy in the EU Transforming the EU's Blue Economy for a Sustainable Future. COM/2021/240 final [Link to document](#)

A Global Partnership for Poverty Eradication and Sustainable Development after 2015 (COM/2015/044 final) [Link to document](#)

The new European Consensus on development 'our world, our dignity, our future' (2017)
[Link to document](#)

European development cooperation in the field of fisheries and aquaculture : state of play
2018 [Link to document](#)

2019 annual report on the implementation of the European Union's instruments for financing
external actions in 2018 [Link to document](#)

2019 EU report on Policy Coherence for Development [Link to document](#)

Budget Support Guidelines. Tools and Methods Series - Guidelines N°7. DG DEVCO [Link to document](#)

Budget support – trends and results 2020 [Link to document](#)

Ex-post and ex-ante evaluation reports

Évaluation rétrospective et prospective du Protocole de mise en œuvre de l'accord de partenariat dans le domaine de la pêche entre l'Union européenne et la République de **Côte d'Ivoire** (2023). [Link to document](#)

Évaluation rétrospective et prospective du Protocole de mise en œuvre de l'accord de partenariat dans le domaine de la pêche entre l'Union européenne et la République de **Cabo Verde** (2023). [Link to document](#)

Ex-ante evaluation study of a possible Sustainable Fisheries Partnership Agreement between the European Union and the Republic of **Angola** (2023). [Link to document](#)

Ex-post and ex-ante evaluation study of the implementing protocol to the fisheries partnership agreement between the European Union and the Republic of **Mauritius** (2021). [Link to document](#)

Évaluation prospective d'un accord de partenariat dans le domaine de la pêche durable entre l'Union européenne et la République de **Guinée** (2021). [Link to document](#)

Retrospective and ex-ante evaluation study of the protocol to the agreement on a sustainable fisheries partnership between the European Union and the Republic of **Liberia** (2020). [Link to document](#)

Ex-post and ex-ante evaluation study of the fisheries partnership agreement between the European Union and the Republic of **Seychelles** and of its implementing protocol (2019). [Link to document](#)

Évaluation rétrospective et prospective du protocole à l'accord de partenariat dans le domaine de la pêche durable entre l'Union européenne et la République du **Sénégal** (2019) [Link to document](#)

Évaluation rétrospective et prospective du Protocole à l'accord de partenariat dans le domaine de la pêche durable entre l'Union européenne et la République islamique de **Mauritanie** (2019) [Link to document](#)

Évaluation rétrospective et prospective du protocole à l'accord de partenariat dans le domaine de la pêche durable entre l'Union européenne et la République de **Côte d'Ivoire** (2018) [Link to document](#)

Évaluation rétrospective et prospective du protocole à l'accord de partenariat dans le domaine de la pêche durable entre l'Union européenne et la République de **Madagascar** (2018) [Link to document](#)

Ex-post and ex-ante evaluation study of the sustainable fisheries partnership agreement between the European Union and the Republic of **Cabo Verde** (2018) [Link to document](#)

Ex ante evaluation study of a sustainable fisheries partnership agreement between the European Union and the Republic of **The Gambia** (2018) [Link to document](#)

Évaluation rétrospective et prospective du protocole à l'accord de partenariat dans le domaine de la pêche durable entre l'Union européenne et Le Royaume du **Maroc** (2018) [Link to document](#)

Évaluation rétrospective et prospective du protocole à l'accord de partenariat dans le domaine de la pêche durable entre l'Union européenne et **São Tomé-et-Príncipe** (2017) [Link to document](#)

Ex ante evaluation of a sustainable fisheries partnership agreement and protocol between the European Union and the Republic of **Ghana** (2017) [Link to document](#)

Ex post and ex ante evaluation of the protocol to the Fisheries Partnership Agreement between the EU and the Republic of **Equatorial Guinea** (2017) [Link to document](#)

Ex post and ex ante evaluation of the protocol to the Fisheries Partnership Agreement between the EU and the **Guinea-Bissau** (2016) [Link to document](#)

Ex post and ex ante evaluation of the protocol to the Fisheries Partnership Agreement between the EU and the Republic of **Mauritius** (2016) [Link to document](#)

Ex-post and ex-ante evaluation of the Protocol to the Sustainable Fisheries Partnership Agreement between the European Union and the Union of **Comoros** (2016) [Link to document](#)

Ex-post evaluation of the current Protocol to the Fisheries Partnership Agreement between the European Union and **Gabon** (2015) [Link to document](#)

Ex-post and ex-ante evaluation of the protocol to the fisheries partnership agreement between the EU and the Republic of **Mozambique** (2014) [Link to document](#)

Reports of joint scientific committees organised under certain protocols

Mauritanie

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Interim Agreement with a view to an Economic Partnership Agreement between the European Community and its Member States, of the one part, and the Central Africa Party, of the other part [Link to document](#)

Interim Partnership Agreement between the European Community, of the one part, and the Pacific States, on the other part [Link to document](#)

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ILO convention C188 – Work in Fishing. Link to [ratification status by country](#) and [document](#)

STCW- convention (IMO convention). Link to [ratification status by country](#) (click 'ratification by State'). Further information on the Convention on the IMO website available [here](#).

The text of the Convention can be purchased by contacting local distributors (for instance in [Europe](#)).

Annex 5: Participants at the final assignment workshop in Brussels, 19 October 2023

Name	Organisation
Graeme Macfadyen	Poseidon
Vincent Defaux	Poseidon
Annira Busch	BMZ
Stephanie Czudaj	GIZ
Beatrice Gorez	CFFA
Francisco Marí	Bread for the World
Gaoussou Gueye	CAOPA
Annegret Finke	BMEL
Emmanuel Berck	DG MARE B3
Catherine Chapoux	DG MARE B3
Charlotte Gobin	DG MARE B3
Ilias Papadopoulos	DG MARE B3
Joelle Philippe	CFFA
Fernando Trabada-Crende	DG INTPA sustainable agrifood systems and fisheries unit
Loïs Comte	European Parliament, assistant to Mrs Roose (GVPE)
Vanya Vulerhorst	Oceana
Ignacio Fresco Vanzini	Oceana
Louis Lambrechts	WWF
Sara Froklin	SSNC Sweden
Juan Carlos Martin Fragueiro	ANACEF
Edelmiro Ulloa	ARVI/ACEMIX
Anertz Muniategi	ANABAC
Aivaras Labanauskas	Lithuanian Long Distance Fisheries Association
Emil Remisz	High Seas Fish Producers Organization (Poland)
H.E. Abou Dosso	Ivory Coast Ambassador
Cisse Diarra	Ivory coast embassy expert/adviser
Alexandre Rodriguez	LDAC

Annex 6: Detailed country case study reports – The Gambia, Mauritania, Madagascar and Senegal

See following pages:

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Mauritania page 119

Madagascar page 217

Senegal page 292



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Potentials of EU Sustainable Fisheries Partnership Agreements and development cooperation for the sustainable development of local fisheries sectors



The Gambia case study report

Assignment for the German Federal Ministry for Economic Cooperation and Development (BMZ)

DECEMBER 2023

POSEIDON
AQUATIC RESOURCE MANAGEMENT

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Acronyms

AC	Advisory Committee
AFICOSA	All Artisanal Fisheries Cooperative Association
AGS	The Association of Gambian Sailors
BMZ	Federal Ministry for Economic Cooperation and Development
CECAF	The Fishery Committee for the Eastern Central Atlantic
COMHAFAT..	Conférence Ministérielle sur la Coopération Halieutique entre les Etats Africains Riverains de l'Océan Atlantique
DG MARE	Directorate General of Maritime Affairs and Fisheries
DoF	Department of Fisheries
ECOWAS.....	Economic Community of West African States
EU.....	European Union
FAO	Food and Agriculture Organisation (of the United Nations)
FSQA.....	Food Safety and Quality Authority
GIZ.....	Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH
GMA	Gambia Maritime Administration
GPA	Gambia Ports Authority
GRT	Gross Registered Tonnage
ICCAT	International Commission for the Conservation of Atlantic Tunas
KII	Key Informant Interview
MS	member state
NAAFO	National Association of Artisanal Fisheries Operators
NASCOM.....	The National Sole fishery Co-management Committee
NEA	National Environment Agency
NGO	non-governmental organisation
PONSAFAG..	Platform of Non State Actors in Fisheries and Aquaculture of the Gambia
PSMA	Port States Measures Agreement
PTC	partner third country
SFPA	sustainable fisheries partnership agreement
SMART	specific, measurable, agreed, realistic, timebound
SRFC.....	Sub Regional Fisheries Commission
TAGFC	The Association of Gambian Fishing Companies
ToR.....	terms of reference

1. Introduction

This report was prepared by **Poseidon Aquatic Resource Management Limited**, as part of a project to consider ‘Potentials of EU Sustainable Fisheries Partnership Agreements (SFPAs) and development cooperation for the sustainable development of local fisheries sectors’. The project was funded by the German Federal Ministry for Economic Cooperation and Development (**BMZ**).

The project considered all SFPAs between the European Union and Partner Third Countries (PTCs) **in Africa**. **Key research areas of interest** for the project were:

1. How to ensure increased levels of benefits from EU fleet activities in African countries, in terms of fish landings and employment, and contributions to food security and national socio-economic benefits?
2. How to design and implement the sectoral support component of SFPAs most effectively, in particular to support small-scale fisheries, gender equity and food security?
3. How to ensure that complementary activities by donors/development partners can contribute to maximising the benefits of the SFPAs?

The Gambia was selected as one of the four priority countries for in-country support and research.

Three missions were completed to The Gambia as follows:¹

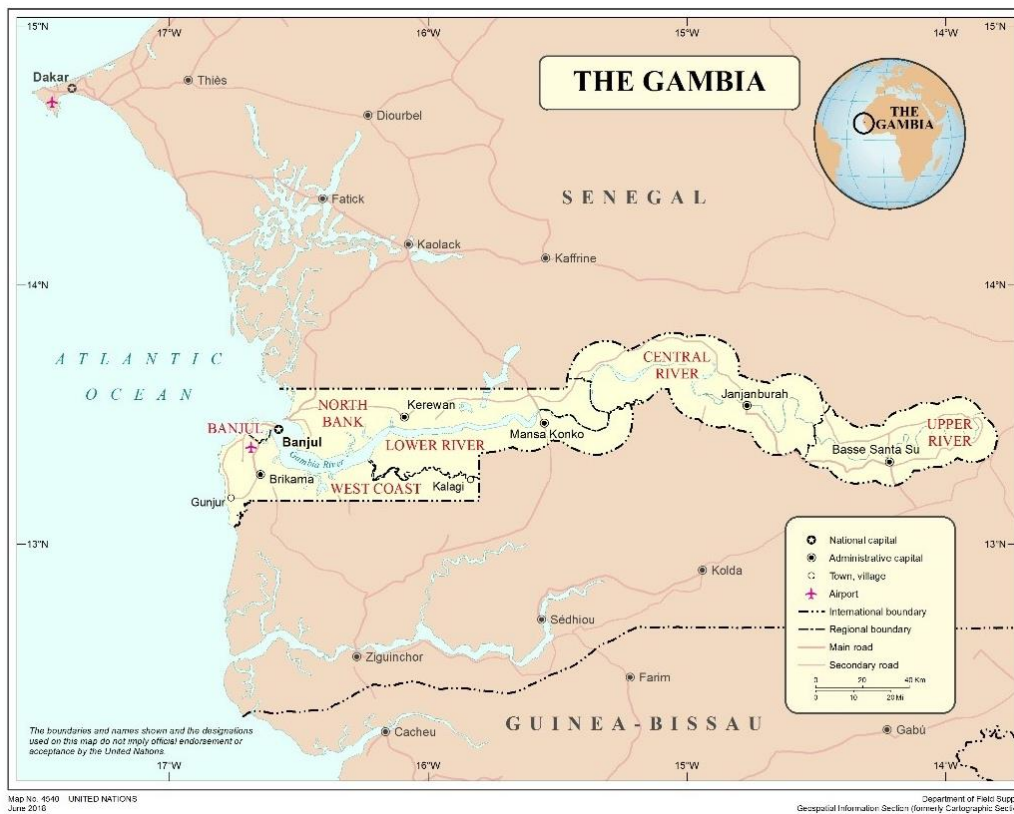
- 31 October to 5 November 2022. The main objective of the first mission was to map stakeholders and the policy and legislative environment, to introduce the project to stakeholders and identify a local consultant, and to plan for future missions.
- 5 to 10 February 2023. The main objective of the second mission was to meet with stakeholders to discuss and explore the main research questions.
- 2 to 8 July 2023. The main objective of the third mission was to further discuss and explore the main research questions with stakeholders, and to hold a national workshop to validate the research’s findings, conclusions and recommendations. Participants attending the national workshop are listed in 2 as part of the workshop report.

This report is not a formal contractual deliverable,² but it details the findings, conclusions and recommendations from the three missions to The Gambia. **The purpose of this report** is to provide the basis for the short Gambia country case study included in the final project report.

¹ All missions conducted by Graeme Macfadyen, with missions 2 and 3 supported by the local consultant, Amie Gassama.

² The four contractual deliverables are: inception report, first progress report, second progress report, final project report.

Figure 1: Map of the Republic of The Gambia



Source: UN Geospatial <https://www.un.org/geospatial/content/gambia> (copyright United Nations)

2. Overview of the SFPA and Protocol

On 31 July 2019, the European Union and The Gambia signed a 6-year SFPA and associated Protocol setting out the fishing opportunities for EU vessels, the financial compensation to be paid by the Union and the modalities of sectoral support to the fishing sector of the Gambia. The current Protocol to the fisheries partnership agreement covers the period 31.07.2019 – 30.07.2025 with a financial contribution of €550,000 per year during 6 years, out of which a specific contribution of €275,000 is dedicated to the support of the fisheries policy of The Gambia.³

Under the **access component**, EU fleets with **fishing opportunities** under the Protocol are from France, Spain, and Greece, as shown below. The agreement is a tuna fishery agreement with a limited demersal component.

ICCAT stock status reports indicate:

- Yellowfin tuna stock status as not overfished (24% probability of overfished status), with no overfishing (43% probability of overfishing taking place) (2019).⁴
- Bigeye tuna stock status as overfished and not undergoing overfishing (2019).⁵
- Skipjack tuna stock status as not overfished (83% probability) with no overfishing (80% probability) (2022).⁶

Table 1: Fishing opportunities provided by the Protocol (number of EU vessels)

Fishing method/species	Spain	France	Greece	Total number of vessels
Tuna purse seine	16	12	0	28
Tuna pole and line	8	2	0	10
Hake trawler	2	0	1	3
Total	26	14	1	41

Source: European Commission, DG MARE website

Data from the Department of Fisheries (MCS department) show that EU Member States (MS) taking up authorisations in 2022 and 2023 were as follows (a detailed breakdown was not obtained for 2021 but 25 authorisations were issued to Spanish and French vessels in 2021):

³ All financial contributions go to the central treasury, with the sectoral support funds (only) ear-marked within central government budgets for use by the Ministry of Fisheries and the Department of Fisheries.

⁴ [YFT_ENG.pdf \(iccat.int\)](#)

⁵ [BET_ENG.pdf \(iccat.int\)](#)

⁶ [SKJ_ENG.pdf \(iccat.int\)](#)

Table 2: Fishing authorisations issued to EU vessels in (2022)

Fishing method/species	Spain	France	Greece	Total number of vessels
Tuna purse seine	4	10	0	14
Tuna pole and line	3	1	0	4
Hake trawlers *	4	0	0	4
Support vessel	1	0	0	1
Total	12	11	0	23

Source: Department of Fisheries. * only two vessels picked up and used their authorisations after they had been issued, so authorisations did not exceed fishing opportunities

Table 3: Fishing authorisations issued to EU vessels in (2023 to date)

Fishing method/species	Spain	France	Greece	Total number of vessels
Tuna purse seine	4	9	0	13
Tuna pole and line	3	1	0	4
Hake trawlers	0	0	0	0
Support vessel	1	0	0	1
Total	8	10	0	18

Source: Department of Fisheries.

The first progress report under this assignment noted that different Protocols to SFPAs with African countries may mandate or incentivise landings and include provisions with regards to the use of national or ACP crew and the taking onboard of observers. The Protocol to the SFPA between the EU and The Gambia:

- contains no mandated requirement for landings, or any incentives in the form of discounted access fees, for EU vessels to make landings.
- requires deep-sea demersal trawlers to have an observer on board. (Section 5, point 1 of the Protocol).
- specifies that a maximum of 15% of authorised Union tuna vessels must have an observer on board, but that the Department of Fisheries must endeavour not to designate observers for EU tuna vessels which already have an observer on board, or which are already formally obliged to allow an observer to embark during the fishing season in question as part of their activities in fishing zones other than the Gambian fishing zone. (Section 5, points 6 and 7, of the Protocol).
- requires that in terms of crew, owners of EU fishing vessels must employ ACP nationals, subject to the following conditions and limits (Chapter V of the Protocol):
 - for tuna seiners and pole and line vessels, at least 20% of the seamen signed on during the tuna-fishing season in the Gambian fishing zone must be from The Gambia or alternatively from an ACP country;
 - for deep-sea demersal trawlers, at least 20% of the seamen signed on during the fishing season in the Gambian fishing zone must be from The Gambia.
- states that vessels owners must transmit on an annual basis information on seamen signed on. This information must include the number of seamen who are nationals: of the EU; of an ACP country, distinguishing Gambians from other ACP nationals; and of non-ACP and non-Union countries. (Chapter V, point 9 of the Protocol).

With regards to the sectoral support component, a multi-annual matrix was prepared and agreed on signature of the Protocol, and annual matrices are agreed during the annual Joint Committee meetings. The matrices are structured around a number of key strategic priorities, with funding allocations over the 6-year period of the Protocol as shown in the Table 4 below.

Table 4: Sectoral support funding allocation by strategic axes (6 years)

Strategic Axes	EUR	% of total
1. Support management measures for fisheries, aquaculture and artisanal fisheries	429 500	26%
2. Strengthen MCS operations and reinforce the fight against IUU Fishing	351 000	21%
3. Strengthening sanitary and quality management for artisanal fisheries and development of fish export capacities	456 250	28%
4. Development of scientific capacity	165 000	10%
5. Protection and conservation of fragile ecosystems	44 250	3%
6. Sectoral support programme management and monitoring	204 000	12%
Total	1 650 000	100%

Source: multi-annual sectoral support matrix (from Department of Fisheries)

Article 5 of the SFPA legal text specifies the requirements for, and obligations of a Joint Committee. A key function of the Committee (point 2 a. of Article 5) is the definition of the annual and multiannual programming sectoral support and evaluation of its implementation. Article 6 of the Protocol to the SFPA specifies various requirements related to the sectoral support component, including a requirement that no later than three months after the date of entry into force or the provisional application of the Protocol, the Joint Committee must agree on a multiannual sectoral programme and detailed implementing rules covering a range of issues including quality and financial indicators for evaluating the results obtained each year. Other requirements include the need for the Gambian authorities to report annually to the Joint Committee on progress made in the implementation of sectoral support (Article 6, point 2 of the Protocol).

Joint Committee meetings have so far taken place as follows:

- July 2019 in Brussels
- October 2020, held remotely
- December 2021, held remotely
- March 2023 in Brussels

The Joint Committee meetings are used to discuss all issues related to the access component of the SFPA and the EU's other interests concerns (e.g. IUU fishing), as well as the sectoral support annual implementation report, which is prepared by the Department of Fisheries (DoF) prior to the meetings. The meetings are also used to agree on the annual sectoral support matrix for the following year.

3. Stakeholders

3.1 Introduction

Prior to the first mission to The Gambia, desk work identified many stakeholders of relevance to the SFPA and its Protocol in The Gambia. However, the stakeholder mapping was primarily for the purpose of the targeted consultation and was thus not fully comprehensive. In this section a more complete listing of stakeholders is presented.

The tables in this section follow the convention used in the inception report and first progress report of categorising stakeholders by whether they are:

- involved with implementing the SFPA/Protocol (governing authorities and DG MARE), Category 1;
- are directly affected by it (the private sector), Category 2; or
- have an interest in it (notably NGOs/civil society organisations, but also other Ministries in the PTC not involved with implementation such as enforcement agencies), Category 3.

3.2 National stakeholders in the Gambia

Table 5: National stakeholders in The Gambia

Organisation	Category / Type	Main role
Ministry of Fisheries, Water Resources and National Assembly Matters	1 / PTC Government	Responsible for setting fisheries policy and for ensuring the safe and sustainable exploitation of resources for domestic and trade use, to safeguard the population and promote food security
Department of Fisheries ⁷	1 / PTC Government	Responsible for the implementation of fisheries policy and legislation, and for management of the SFPA. It is the competent authority for the issuing of catch certificates under the EU IUU Catch Certificate Scheme (CCS) as laid down in Council Regulation EC 1005/2008. An MoU with the FSQA (see below) provides for the Department to undertake sanitary controls and inspections at landing sites and onboard vessels, with the FSQA completing factory inspections and issuing health certificates.
The Gambia Maritime Administration (GMA)	3 / PTC Government	Responsible for managing, regulating and coordinating activities in the maritime industry, to ensure safety of navigation and protection of the marine environment, and for the registration of all vessels, including fishing vessels, under the Gambian flag
The Gambian Navy	3 / PTC Government	Under the authority of the Department of State for Defence, the Navy is responsible for the protection of fisheries and the territorial and coastal waters, along with other responsibilities related to border control, pollution, etc
The Ministry of Foreign Affairs	3 / PTC Government	Responsible for external relations
Gambia Ports Authority (GPA)	3 / PTC Government	A dedicated fisheries quay (the 'Banjul Fisheries Jetty') within the main port of Banjul is managed by GPA under a Memorandum of Understanding (MoU) between the Ministry of Fisheries, Water Resources and National Assembly Matters and the GPA

⁷ Has five units: Fisheries development and research unit (17 technical staff and 2 support staff): responsible for research and statistics; Fisheries extension unit (42 technical and 3 support staff); responsible for extension and data collection at landing sites; Fisheries MCS unit (8 technical and 2 support staff); responsible for pre-licencing inspection, licencing (vessel authorisations) and MCS activities; Fisheries inspection unit (5 technical and 2 support staff); responsible for inspection of products at landings sites and on vessels under an MoU with The Food Safety and Quality Authority, post harvest technology, and issuing of IUU catch certificates; and Aquaculture development unit (5 technical and 1 support staff); responsible for aquaculture sector development. (staff numbers based on text in ex ante evaluation report and may have changed, but the mission confirmed that no major re-structuring of units has taken place since 2018.)

Gambia Ports Authority (GPA)	3 / PTC Government	Main commercial port. Has two main quays and 4 berths used for cargo, container vessels, and larger fishing vessels
National Environment Agency (NEA)	3 / PTC Government	Responsible for environmental protection, and part of the Ministry of Environment
The Food Safety and Quality Authority (FSQA)	3 / PTC Government	Established in 2014, and is the competent authority for sanitary controls and the issuing of fish health certificates for export, taking over the responsibility from the Department of Fisheries in 2014
Department of parks and wildlife management	3 / PTC government	Responsible for management and protection of mangroves in national parks (e.g., Tanbi Wetlands National Park), and part of the Ministry of Environment
Department of Forestry	3 / PTC government	Responsible for management and protection of mangroves, and part of the Ministry of Environment
National Association of Artisanal Fisheries Operators (NAAFO)	2 / PTC private sector	Umbrella association which brings together 52 affiliated associations including artisanal fishermen, but also traders and fish processors. Established a micro-finance scheme with individual members of affiliated associations paying, started about 7 months ago and slowly building up funds. Plan to use funds in a revolving fund for women traders and workers.
Platform of Non State Actors in Fisheries and Aquaculture of the Gambia (PONSAFAG)	2 / PTC private sector	Now the main umbrella organisation of small-scale organisations to facilitate effective engagement with Government. Established in 2019 through the PESCAO project based on the old 'Fisheries Platform'. They have initiative to establish a management measure to prioritise small pelagic supply for local producers and are trying to engage with the Ministry. Have also registered fisherfolk with funds from the Ministry/SFPA sectoral support. Fisherfolk are supposed to pay registration fees (some do, some don't). Have participated in the recent work to update the policy, strategy, legislation and act. Other activities mainly relate to establishment and sensitisation of communities to their activities. Has an Executive Committee of 8 people.
The National Sole fishery Co-management Committee (NASCOM)	2 / PTC private sector	Conservation-focussed committee, which has a management plan developed in 2012 and gazetted in 2013. Have a closed season (1 st May to 31 st October) which is implemented, and exclusive use rights over sole fishery. Have a proposal in submitted to the Department of Fisheries, to receive some recent support through SFPA sectoral support for engine upgrades for MCS, marker buoys, and data collection.

Small coalition	pelagic	2 / PTC private sector	Representative organisation of catching and processing operators of small pelagics (bonga and sardinella) at the community level. Established in February 2022 through the MAVA project (part of a four country sub-regional coalition with other national organisations in Senegal, Mauritania and Guinea Bissau). Main focus is on protecting small pelagic for food security. Wanting to control mesh size, post-harvest losses. Main problems relate to storage facilities, especially if catch volumes are high, as smoking capacity is not enough to absorb catches. Chinese fish meal factories are a big problem as buying fish which is not then available for local consumption (many fishermen prefer to supply fish meal factories because can sell in bulk and ease of landing location).
All Fisheries Cooperative Association (AFICOSA)	Artisanal	2 / PTC private sector	Umbrella organisation for fisheries cooperatives
Community Fisheries Management Committees	Centre	2 / PTC private sector	On each main landing site, these committees manage the day to day activities of the landing sites. 11 main small-scale landing sites.
The Association of Gambian Fishing Companies (TAGFC)	Fishing	2 / PTC private sector	Association representing larger-scale commercial fishing companies.
Association of Gambian Observers	of	2 / PTC private sector	Association represents scientific observers. It has 5 management staff and a rented office in Banjul. A big problem for observers is often the timing of payments due to the time for bank transfers. Observers have contracts with the government. The association is currently supplying around 30-35 vessels, with observers deployed on a rotational basis. SFPA sectoral support was used for a training of observers in 2022.
Association of Gambian Sailors	of	2 / PTC private sector	Association represents Gambian crew who may be employed on foreign fishing vessels. It recently graduated around 100 crew in line with <i>Standards of training, certification and watchkeeping for fishing vessel personnel</i> from the newly established (2021) Maritime School (private), many of whom are now working in the Pacific, and West Indian Ocean. Association also does safety training.
Bluefinn, Food and Fisheries, Atlantic Seafood, Rosamond Trade,	Kendaka	2 / PTC	Fish processing plants with approval to export to the EU. Companies buy fish from industrial vessels and small-scale fisheries landing sites and sell on domestic and international markets. High quality fish (e.g. cuttlefish, octopus, shrimp and good quality demersal species) is sold in Europe.

International Pelican Seafood, Hansen/Maravilla Seafood, A-Plus Fishing Enterprise, West Africa Peche Limited		Some of the companies (e.g. Blue Finn) also have vessels. Hansen/Maravilla is Spanish-owned and exports around 3 000 tonnes a year to Spain and Italy. All the others are part- or fully Gambian-owned. 3-4 are joint ventures with Chinese and Korean companies and product is mostly exported to China and Korea, and the remainder are fully Gambian owned. Some produce from factories is also sold to other African countries in the region. Data on total employees in the factories are not available.
GAMFISH	2 / PTC	Local fish trading company buying fish and bycatch from industrial vessels (and sourcing by truck from Morocco) and selling to local women fish traders. Have refrigerated containers in various locations around the country.

Source: own elaboration based on desk review and consultation in The Gambia

3.3 EU stakeholders

Following from the fishing opportunities show in earlier, and the fishing authorisations actually taken up, key EU-based stakeholders in Member State authorities and the private sector are listed below.

Table 6: EU stakeholders of relevance to SFPAs with The Gambia

Organisation	Category / Type	Main role
Unit B3 DG MARE, Belgium	1 / EU	Responsible for contracting ex-ante and ex-post evaluations, negotiating the SFPAs and Protocol once given a negotiation mandate by relevant EU institutions, and then for managing the implementation of the Protocol (being part of the Joint Committee).
EUD to Senegal	1 / EU	A fisheries attaché based in the EUD in Senegal is responsible for additional oversight of the SFPAs/Protocol, as well as representing EU fisheries interests in both Senegal and The Gambia.
MAPA - International Fisheries Relations Dept, Spain	1 / EU MS gov	The Spanish managing authority responsible for distant water fishing vessels and foreign access agreements
DG AMPA	1 / EU MS gov	The French managing authority responsible for distant water fishing vessels and foreign access agreements
Albacora SA Cantabrica de Tunidos Atuneros Congeladores	2 / EU private sector	Spanish purse seine owners with vessels having taken up fishing authorisations in The Gambia. Albacora SA 1 vessel (and 1 support vessel), Cantabrica de Tunidos 2 vessels, Atuneros Congeladores 1 vessel

San Francisco CB Iribar Zulaika CB Pilar Torre	2 / EU private sector	Spanish pole and line owners with vessels having taken up fishing authorisations in The Gambia.
Pesqueras Nores Marin	2 / EU private sector	Spanish demersal trawler owner with a vessel having taken up a fishing authorisation in The Gambia
Compagnie Française Via Ocean	2 / EU private sector	French purse seine owners with vessels having taken up fishing authorisations in The Gambia. Compagnie Française 6 vessels, Via Ocean 4 vessels.
HESA SNC	2 / EU private sector	French pole and line owners with 1 vessel having taken up a fishing authorisation in The Gambia
OPAGAC and ANABAC	2 / EU private sector	Representative organisations for Spanish purse seine vessel owners
Dakar Tuna	2 / EU private sector	Representative organisation for Spanish pole and line vessel owners
ORTHONGEL	2 / EU private sector	Representative organisation for French purse seine vessel owners
Dakar Tuna	2 / EU private sector	Representative organisation for French pole and line vessel owners

Source: own elaboration based on desk review and consultation in The Gambia

3.4 Regional stakeholders

A number of regional stakeholders are potentially relevant given Gambia's participation in them and their role in regional fisheries management and research.

Table 7: Regional stakeholders of relevance to SFPAs with The Gambia

Organisation	Category / Type	Main role
ICCAT	3 / regional	ICCAT compiles fishery statistics from its members and from all entities fishing for these species in the Atlantic Ocean, coordinates research, including stock assessment, on behalf of its contracting parties
SRFC / CSRP	3 / regional	The Sub-Regional Fisheries Commission (SRFC) is an inter-governmental fisheries cooperation organization established by the Convention of 29 March 1985, amended on 14 July 1993 in Praia (Cabo Verde). It has 7 member States: Cabo Verde, The Gambia, Guinea, Guinea-Bissau, Mauritania, Senegal and Sierra Leone. Its headquarters are located in Dakar, Senegal. The SRFC's purpose is to ensure harmonization of national policies of Member States on the preservation, conservation and exploitation of fisheries resources and strengthen cooperation in the following areas: Ensuring harmonization and consistency of national

		fisheries policies, with regards to the conservation and exploitation of fisheries resources; Fostering sub-regional cooperation for monitoring, control and surveillance of fisheries zones, including providing institutional, legal and operational support to eliminate illegal, unreported and unregulated (IUU) fishing; Strengthening human capacities to undertake fisheries research activities; Reinforcing the scientific and technical information system; Ensuring adoption of joint strategies by international bodies.
CECAF	3 / regional	CECAF has a Scientific Sub-Committee in charge of providing appropriate advice to the Committee for fisheries management decisions. To this end, the Scientific Sub-Committee gathers scientists from all parties concerned with exploitation of fisheries resources in the Eastern Atlantic in four main working groups focusing on CECAF North and CECAF South resources and on small pelagics and demersal species.
ECOWAS	3 / regional	The aim of the Community of 15 countries (including The Gambia) is to promote co-operation and integration, leading to the establishment of an economic union in West Africa in order to raise the living standards of its peoples, and to maintain and enhance economic stability, foster relations-among Member States and contribute to the progress and development of the African continent. The Directorate of Agriculture and Rural Development (of the ECOWAS COMMISSION Department of Agriculture, Environment and Water Resources Directorate) is responsible for fisheries, and has been integrally involved with the PESCAO project.
ATLAFCO / COMHAFAT	3 / regional	The Ministerial Conference on fisheries cooperation among African States bordering the Atlantic Ocean (ATLAFCO), is an intergovernmental organization founded in 1989 gathering 22 countries from Morocco to Namibia. The Conference supports: Promoting cooperation in fisheries management and development; Development, coordination and harmonization of Member States' efforts and capabilities to preserve, exploit, develop and commercialize fisheries resources; Strengthening solidarity with landlocked African States and geographically disadvantaged countries in the region.

Source: own elaboration based on desk review and consultation in The Gambia

3.5 Donors active in The Gambia

In the Table 8 below, information is provided on donors active in The Gambia, where their activities are of potential relevance to the SFPAs/Protocol.

Table 8: Donors active in The Gambia and their projects

Organisation	Main areas of engagement and relevant projects
European Union	<ul style="list-style-type: none"> Regional PESCAO project (fisheries governance) in which The Gambia participates.

	<ul style="list-style-type: none"> Regional SWAIMS project (maritime security) in which The Gambia participates, and through which training and equipment for vessel detection provided. Planned project through the European Investment Bank to start in 2023 to support extension of the main port, and jetty expansion. Financial support (along with BMZ) for the FAO-implemented FISH4ACP programme
Agence Francaise de Developpement	<ul style="list-style-type: none"> Mangrove ecosystem restoration in The Gambia. Has four specific objectives (and a budget of EUR 6.9 million): Strengthen the national legal and policy framework for enhanced climate adaptation and coastal resilience; Test restoration technics on 800 ha of mangrove in different contexts and develop a national strategy and action plans for large-scale restoration of mangrove ecosystems in The Gambia.; Improve governance and management effectiveness of marine protected areas in key mangrove areas; Support the development of sustainable value chains and alternative income for grassroots women's and youth organizations in the project's pilot sites
GIZ	<ul style="list-style-type: none"> “Fund for Regional Stabilization through Development in fragile regions within ECOWAS Member States” which includes a pilot project in Gambia. The Pilot project is active in three different value chains. 1) Vegetables/Agriculture, 2) Poultry and 3) Fisheries/Aquaculture. Project implementation started since October 2019 and will close December 2023. A financial component Window (Implemented by Gamworks) provides infrastructure support to 42 communities, including for construction of aquaculture ponds, fish smoking houses and potentially an oyster/fish processing facility. A technical cooperation window (implemented by GIZ) provides technical know-how through training and capacity building measures and is targeting 850 beneficiaries in the fisheries value chain namely: production (aquaculture), processing, storage, transportation and marketing (there is a budget of EUR169,000 through a Financing Agreement with the Department of Fisheries as the main Implementing Partner). Additionally a Micro Enterprise Start up Support Initiative (MESSI), will provide mini grants for beneficiaries for start-up support for small and medium businesses in their communities. For fisheries this will target individuals and communities in need of solar drying for fish, tri-cycles for transportation, solar fridges for storage, solar pumps.
FAO	<ul style="list-style-type: none"> PSMA project started in 2022, a 3-year project, focussing on building capacity for implementation of the PSMA agreement. A mission in November 2022 involved an in-depth legal review and an interagency workshop Shared sardinella project. A regional project implemented by the Ministry of Fisheries and Water Resources and Assembly Matters, as part of the Nansen Programme. Focussed on biological and socio-economic data Technical Cooperation Project on building capacity of women fish processors (training and some small equipment inputs e.g. insulated boxes). 2022 start/finish FISH4ACP on mangrove oyster value chain development, design phase 2022 and main implementation phase 2023 to 2025 Climate Resilient Fishery Initiative for Livelihood Improvement in the Gambia (PROREFISH Gambia). The project (USD 17.2 million grant + USD 7.8 million co-financing) aims to assist Gambian fisherfolk to build

	<p>their resilience against climate change and improve their livelihoods. The project has a particular focus on climate-proofing fisheries infrastructure. Should start in 2023</p> <ul style="list-style-type: none"> • Canary Current Large Marine Ecosystem (CCLME) project under the Nansen programme. Funding from NORAD and implemented by FAO. Project supports participation in working groups (Ecosystems, small pelagics, demersals) and may also be small projects on transboundary stocks.
JICA	<ul style="list-style-type: none"> • COPAO project to support co-management of fisheries resources through training and capacity building (started in Senegal and expanding into all SRFC countries. Started in 2022 and will run to 2024) • Planned new project to establish and refurbishment of ice plants and landing facilities and small-scale landing sites • Support to oyster value chain through product development and oyster farming trials
MAVA (Swiss philanthropic organisation), and Clarmondial	<ul style="list-style-type: none"> • LEAD project seeks to support West African fisheries in their transition to sustainable management. With a focus on eight fisheries located in Cape Verde, Mauritania, Senegal, and The Gambia, the Lead Project partners will develop Fishery Action Plans and appropriate financing instruments to support these fisheries in their journey toward sustainability and MSC certification
USAID	<ul style="list-style-type: none"> • Women Shellfishers and Food Security Project: Phase 2: 2022 to 2025. The project will be implementing: 1) activities in the ground in Gambia (with TRY as the main partner) and Ghana as well as 2) continuing to build a regional network of West Africa shell fishers– knowledge hub. Implemented by University of Rhode Island (USA) and University of Cape Coast (Ghana)

Source: own elaboration based on desk review and consultation in The Gambia

4. Policy and legislative environment

A key requirement of SFPAs and their associated Protocols is that the access component is coherent with national policies and strategies in the PTC. Ex ante evaluations concluded prior to a negotiating mandate being given to the European Commission assess such coherence. In addition, sectoral support funding must be used in such a manner to be coherent with, and indeed to support, the implementation of national policy.

In the table below, key national policy and legislative documents are listed along a brief summary.

Table 9: National policy and legislation of relevance in The Gambia

Policy, legislation, or management arrangement	Summary of content
Draft Fisheries and Aquaculture Policy 2022-2031	<p>The policy specifies a vision, goal, general objective, and then specific objectives as follows:</p> <ul style="list-style-type: none"> • Ensure effective management and sustainability of fisheries and aquaculture resources; • Strengthen and promote research for innovation and development in fisheries & aquaculture; • Provide quality extension services to promote standards that meets the needs of fisherfolk; • Promote rigorous inspection services for assuring quality control in fisheries and aquaculture; • Strengthen the monitoring, control and surveillance system to avert the illegal, unregulated and unreported exploitation of fisheries and aquaculture resources; • Promote responsible aquaculture that efficiently complements capture fisheries; • Promote investments in fisheries and aquaculture infrastructure and facilities; • Develop institutional and human resource capacity and promote fishers and aqua farmer; • Enhance the active involvement of women and youth in fisheries and aquaculture development; • Build the capacity of fishers and aqua-farmers to access and better manage finance and credit facilities; • Promote availability of quality fisheries and aquaculture inputs; • Strengthen capacity for effective participation in regional and international cooperation; and • Mainstream cross-sectoral issues in fisheries and aquaculture development
The Draft Fisheries and Aquaculture Sector Strategy, 2022	<p>Provides the basis for implementing fisheries policy. The strategy itemises four (4) broad-based Strategic Priority Areas (SPAs) covering a wide range of issues involved in the conservation, protection, management, utilisation, processing, marketing and trade of fisheries and aquaculture products. The Strategic Priority Areas are:</p> <ol style="list-style-type: none"> i. Management and sustainability of fisheries resources; ii. Aquaculture development; iii. Strengthening capacity for fisheries management and development; and iv. Improving value addition, post-harvest fisheries marketing and trade
The Fisheries Act, 2007, Fisheries Regulations, 2008, and Fisheries (Amendment) Regulations, 2017	<p>Provide the legislative basis for managing the fisheries and aquaculture sector in The Gambia. The Act provides in its different Parts for: Administration of the Act and Appointments; Establishment and functions of a Fisheries Advisory Committee (not currently functional); Fisheries conservation, management and development measures; A Fisheries Fund; General license requirements; Local licensing provisions; Foreign licensing provisions; High Seas fishing; Aquaculture licensing, research, protection and prohibitions; Fish processing, import and export; Prohibitions; Powers of authorized officers; Fisheries observers; Sale,</p>

	<p>release and forfeiture of retained property; Jurisdiction and evidence; and Miscellaneous. The Fisheries Regulations have Parts dealing with: Preliminary; Register of fishing vessels; Register of commercial fishing canoes; Foreign fishing vessel licences; Local fishing vessel licences; Sports fishing vessel licences; Research and test fishing licences; High Seas fishing licences; Communication; Aquaculture; Conservation measures; Miscellaneous. Section 14 of the Act empowers the Minister of Fisheries to establish "special management areas" for the conservation and management of community fisheries.</p> <p>The Act and Regulations were reviewed in November 2022. A national workshop took place 1-2 November 2022, facilitated by a national consultant, with funds provided from the sectoral support component of the SFPA to proposed revisions to the Act and Regulations.</p>
Fisheries Products Regulation 2011	The regulation objective is to pursue a high level of protection of human life and health and the protection of consumers' interests, including fair practices in food trade, taking account of the protection of animal health and welfare and the environment. It declares the Fisheries Department the Competent Authority to enforce the Regulation and establishes conditions to place fishery product on the market or for import and export. Other parts of the regulation refer to health control, national environmental monitoring program, control plan for production conditions, etc
The Food Safety and Quality Act 2011 (and amendment bill of 2014)	Establishes the food safety and quality environment by instituting structures and control mechanisms to ensure the safety and quality of food and feed at the national level and for connected matters. The Act also established the Food Quality Authority Safety and Quality Authority responsible for implementing legislation, standards and inspection as well as delegating authority for the same.
Wildlife Conservation Management Act 1977	This Act provides for the conservation and rational management of wildlife in The Gambia and for matters connected therewith and incidental thereto.
The National Environmental Management Act, 1994	This Act provides the principles of environment protection and the instruments to carry out an environment protection policy in the Gambia.
The Merchant Shipping Act, 1995	Not accessed/reviewed
Maritime Administration Act, 2010	Not accessed/reviewed
The Armed Forces Act 1984	Provides for the protection of marine resources and the territorial and coastal waters by the Navy.

Source: own elaboration

5. How to increase benefits from EU fleet activities to the Gambia in terms of fish landings and employment: Findings

5.1 Background information on Gambian and non-EU industrial vessel landings and sale in domestic markets

Some fish from Gambian and non-EU flagged industrial trawlers fishing in Gambian waters⁸ are made available for sale on the local market. Vessels have links to processing factories and land in the Gambia, or land in Senegal. Higher value fish landed in The Gambia is generally for packing in factories prior to export. There are eight processing plants in the Gambia (one of which is Spanish owned) in the EU list of establishments approved to export fish and fisheries products to the EU (see Annex 1). However much of the high value product is exported to Asian markets given joint venture arrangements between Gambian and Asian owners/operators of the export factories.⁹

Non-EU vessels contributing fish supplies on the local market do so through:

- i) A requirement for semi-industrial non-EU demersal vessels to land all catches in the Gambia. All semi-industrial catches are supposed to be sold in the domestic market, but some cephalopods and other higher value species are being processed in factories and exported. Most bycatch ('African mix') from vessels/companies landing in Banjul is sold on the domestic market but some is exported to other African countries. The Africa mix is comprised of low value species, and sorted on landing and sold as different species by women traders in the domestic market.¹⁰
- ii) A requirement for industrial vessels to land 10% of their catches in the Gambia for sale to the Department of Fisheries (DoF). This requirement does not apply to the EU demersal trawler(s) operating under the SFPAs. The 10% is sold by DoF to Gamfish a local trading company, which in turn sells fish to local women traders. This 10% takes the form of Africa mix.

Semi-industrial catches are generally landed either at the fisheries jetty for smaller demersal trawlers. Larger industrial vessels (demersal and small pelagic) tend to land in the main commercial port. Catches by small pelagic vessels flagged to Guinea Bissau are offloaded to carrier vessels which discharge 10% of catches at the commercial port. Additionally, some semi- and industrial-vessel catches are landed at the jetty at the Spanish-owned Hansen/Maravilla processing plant at Denton bridge on the edge of Banjul.

Catches by non-EU industrial vessels made available from semi- and industrial-vessel landings for sale on the local market by women traders are thus either purchased by them directly from the fisheries jetty in Banjul, from the Hansen/Maravilla jetty, or from Gamfish. Gamfish also purchases 'African mix' from Morocco (trucked to the Gambia [3-5 days]) and frozen small pelagics from pelagic trawlers (it acts as the local agent for 5 foreign owned vessels).¹¹ Gamfish has several refrigerated containers located around the country, including up-river, from which fish is sold to women fish traders on a daily basis. Gamfish report strong demand in the local market for fish they import and distribute through their network of trucks

⁸ Some vessels are Gambian owned and flagged, but many are Chinese owned and Gambian flagged.

⁹ Data on export volumes/values to different markets are not available.

¹⁰ Data on sales of Africa mix on the domestic market from these non-EU industrial vessels, are not available.

¹¹ Data on volumes are not available.

and containers, suggesting that were EU landings by demersal vessels increased there would be demand for such Africa mix/bycatch.

Women fish traders typically transport the small number of boxes or baskets of fish they buy from the fisheries jetty or from Gamfish to local markets using local taxis to get to market sites, sell fish the same evening, or store fish in rented market chill stores for sale the following day. It is usual for fish available for sale to be purchased, but consultations suggest that when it is necessary to rent space in chill stores sufficient space is available. Formal estimates of fish loss are not available, but consultations suggest that there is very little or no fish loss/waste due to strong demand and the chill space available.

5.2 Port infrastructure and services

Port infrastructure plays a key role in the ability and interest of EU vessels to land their catch in the Gambia. With regards to landings infrastructure of larger scale commercial fishing vessels, there are two main options, both run and managed by the Gambia Ports Authority: the main commercial port, and the Banjul Fisheries Jetty.

5.2.1 Main commercial port

The main commercial port in Banjul can service/receive large fishing vessels, and if EU tuna vessels were to land in The Gambia they would do so in the main port. Landings by fishing vessels in the main port are very infrequent but have in the past included landings by Russian small pelagic vessels. Carrier vessels receiving small pelagic fish from vessels flagged to Guinea Bissau also land in the commercial port. No EU vessels are reported to have landed fish in the main port since the SFPA/Protocol started (although the one Spanish trawler with a fishing authorisation docked in the main port for its inspection prior to fishing in Gambian waters).

The main commercial port has two main quays and four berths (see Figure 2 and Figure 3 below). Berth number 1 (the outside quay wall of one quay) is 123m in length with a draft of 10-12m and is used mainly but not exclusively for bulk cargo. Berth number 2 (the inside quay wall of berth 1) is around 100m in length with a draft of 6-8m and is mainly for fish landings. Berths 3a and 3b combined have a length of more than 300m and are used for very large container ships. Berth number 4 (on the inside of berth 3) is around 100m in length and can be used for offloading bulk cargo or fish. Berths numbers 1, 2, and 4 can thus all be used for offloading fish from vessels too large to land fish at the fisheries jetty.

The Gambia Ports Authority (GPA), which manages both the main commercial port and the fisheries jetty, report that while Berth number 3 in the commercial port is congested and plans are underway for an expansion of the quay (either through a concession or with funds from the European Investment Bank), berths 1, 2 and 4 between them provide plenty of capacity for offloading fish from vessels too large to land fish at the fisheries jetty. This finding is important as it reveals that port quay wall infrastructure is not itself a reason for EU vessels not to land fish into the Gambia.

Figure 2: Quay 1: berth 1 on left/outside quay wall and berth 2 on right inside quay wall



Source: Graeme Macfadyen.

Figure 3: Berth 3a and 3b on right/outside quay wall and berth 4 on left/inside quay wall



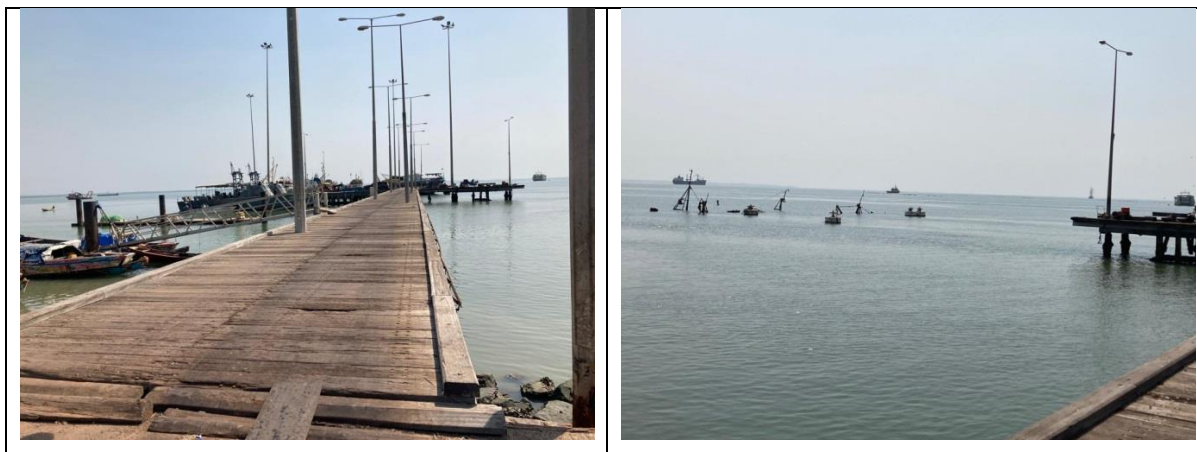
Source: Graeme Macfadyen.

5.2.2 Banjul Fisheries Jetty

The Banjul Fisheries Jetty (see Figures below) nearby to the main port in Banjul can accommodate medium-sized commercial fishing vessels. The Jetty was inaugurated in 2013 and funded by the Arab Bank for Economic Development, the African Development Bank, and the Government of The Gambia. Access to the main quay is across a wooden section of causeway of around 5m in width with a maximum load of 10 tonnes (vehicle and cargo), and then a section of concrete causeway. The main quay length used to offload fish (which is in the form of a 'T' at the end of the causeway) is only 60m long and around 10m wide, with a draft of 5m at low tide and 6m at high tide. The jetty is used by around 20 semi-industrial demersal trawlers (mostly Gambian flagged, but many with foreign [Chinese] ownership), conducting trips of 4-5 days, which land fresh fish on ice. Catches are divided on the jetty into 'African mix' and higher value species (demersals, cuttlefish), which as noted above are

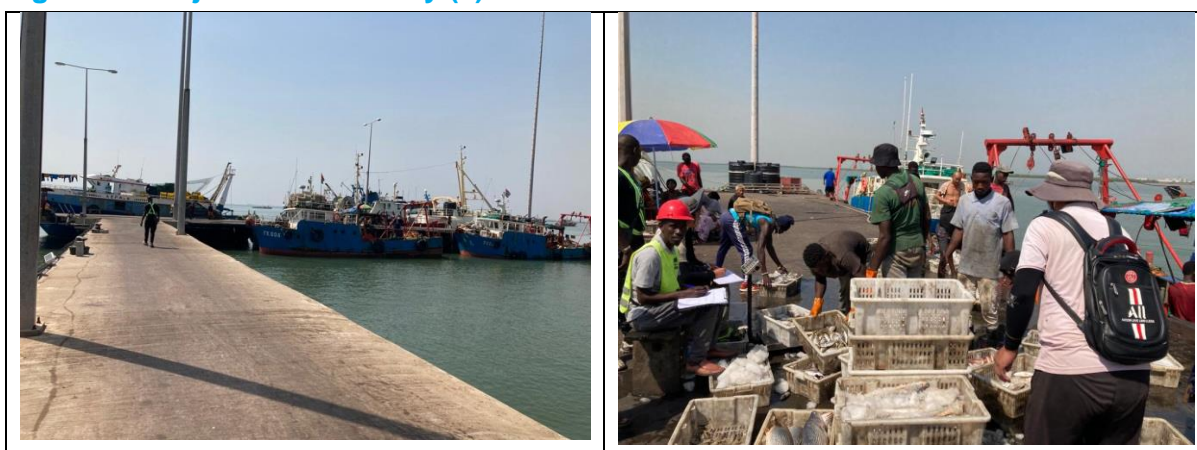
destined for export. Fish is transported from the jetty across the wooden section to the main access road to the Jetty using flatbed tricycle motorbikes, for loading into trucks for transfer to factories and export in the case of higher value species, or for sale to women traders in the case of 'African mix'. Three fishing vessels sank close to the Jetty in recent years, complicating access to/from the jetty.

Figure 4: Banjul Fisheries Jetty (1)



Source: Graeme Macfadyen. Left side, wooden access causeway. Right side, sunken vessels to left of landings jetty

Figure 5: Banjul Fisheries Jetty (2)



Source: Graeme Macfadyen. Left side final section of concrete access. Right side, main landings quay.

Fuel and water can be supplied at the Jetty (and the main port quays), but there is no ice production of chill/cold storage on the Jetty. And critically, given the large share of total operational costs made up of fuel on fishing vessels, there is no international fuel bunkering at the main commercial port meaning that the port is not competitive compared to fuel in Dakar.

5.2.3 Port charges

Charges (which are levied in Euros and apply by default for landings made at the Jetty or in the main port, and which apply to any EU vessels landings under the SFPA/Protocol) are as follows:

On vessels:

- Pilotage, EUR 95 entry and EUR 95 exit;
- Berthage, EUR 0.15/GRT for the first 24 hours and then EUR 0.09/GRT for every 12 hours;
- Berthing gang charges, EUR 46.55 for tying up and EUR 46.55 for un-tying; and

- Buoy and lights charge, EUR 0.28/net registered tonnage.

On fish:

- Stevedoring, EUR 6/tonne;
- Wharfage, EUR 1.1/tonne; and
- Tallying charge, EUR 1/tonne (if no fish landed and stevedoring charges not levied).

However, the Fisheries Jetty provides a discount of 50% on these charges for all vessels that apply for a concessionary rate. For this concessionary rate to be approved, vessels must land 100% of their catches at the Fisheries Jetty.

Dry dock facilities are currently not able to accommodate fishing vessels, but recent agreement has been reached for a private public partnership to refurbish and run a dry dock facility located in between the Fisheries Jetty and the main port.

5.3 Landings by EU fishing vessels into the Gambia

5.3.1 Current levels of landings and flows of product from EU vessels

No EU vessels (tuna purse seiners, tuna pole and line vessels, or demersal trawlers) **have made any landings of catch into The Gambia** since the start of the Protocol, either at the main commercial port or the fisheries jetty. No port visits have been made by tuna vessels as they are not required to do so for inspection prior to the issuing of a fishing authorisation and commencement of fishing in the Gambian Exclusive Economic Zone (EEZ), but the Spanish trawler with a fishing authorisation in 2022 docked in the main port for its inspection prior to fishing in Gambian waters as required.

Catches made under the SFPAs by EU vessels, have been low, as shown in the following Table 10 and Table 11.

Table 10: EU catches in Gambian waters (2021)

Fishing method/species	Spain	France	Greece	Total (tonnes)
Tuna purse seine	90	0	0	90
Tuna pole and line	83.5	0	0	83.5
Hake trawlers	400	0	0	400
Support vessel	0	0	0	0
Total	573.5	0	0	573.5

Source: Department of Fisheries

Table 11: EU catches in Gambian waters (2022: provisional)

Fishing method/species	Spain	France	Greece	Total (tonnes)
Tuna purse seine	0	0	0	0
Tuna pole and line	75	0	0	75
Hake trawlers	120	0	0	120
Support vessel	0	0	0	0
Total	195	0	0	195

Source: Department of Fisheries.

Pole-and-line vessels are most commonly landed in Dakar but transshipped to canneries in Ghana, and to a lesser extent Cote d'Ivoire, with much of this product ending up in the EU market, but some sold in African markets. Purse seiners land their catches predominantly (80-90%) in Côte d'Ivoire (Abidjan) with the remainder being landed in Cape Verde (mainly only Spanish catches) and Ghana. These landings are motivated by tuna canneries plants located at those locations. With respect to demersal freezer trawlers, these vessels also predominantly land catches into Canary Islands, for final sale in EU markets.

The flow of tuna and demersal catches resulting from access by EU vessels to Gambian waters provided by the SFPAs thus by-pass the Gambia entirely. This means there are no benefits at present from any EU tuna catches transshipped in the Gambia, sold on the domestic market, or processed in the Gambia for export, as such practices do not occur. Apart from the value added generated by the government in terms of financial compensation for access, there are therefore no additional benefits from the SFPAs in terms of value added, employment or food security. Such benefits from the EU/Gambia SFPAs are instead generated in Senegal where EU vessels land their catch. These facts would be expected to be presented in the ex-post evaluation of the current SFPAs/Protocol, as is common practice for all such SFPAs/Protocol evaluations, when the evaluation is completed during 2024 prior to any future negotiations between the EU and the Gambia over a new Protocol.

5.3.2 Gambian interests in EU vessel catches

Gambian stakeholder interests with respect to landings of EU catches in the Gambia are:

- Port authorities would like landings to be made as it would generate port revenue from fees.
- Locally-based small scale fishers interests are not for increased landings by EU vessels as this could depress market prices for fish they land, due to competition in the market for sales.¹²
- The Department of Fisheries would wish demersal landings to be made because of the multiplier impacts of products landed and sold domestically, and the contributions to food security which would be in line with national policy. However there is no national plan or strategy to develop tuna processing facilities in The Gambia as such developments are not considered realistic or viable, and therefore no expressed interest in tuna landings by EU vessels.
- Local demersal/cephalopod processing plants, of which eight are authorised to export to EU markets (see Annex 1) would welcome EU landings of high-quality fresh fish from EU demersal trawlers for processing/packing and then export, but catches of frozen demersal fish are not of interest to them.
- Gamfish would welcome increased demersal landings of bycatch/Africa mix for sale to women traders who are based both in the Banjul area and up-country.
- Consumers would welcome increased demersal bycatch as it would increase the availability of fish (contributing to food security) and reduce market prices. However, demand for tuna is not strong in local markets, with a strong market preference for white fish and small pelagic species by consumers.
- Women fish traders would benefit from increased demersal landings of both demersals and bycatch/Africa mix as it would increase the availability of fish to them for sale on the local market, thus generating employment and income for them.

Consultations were used during the three missions completed to consider the possibility/risk that when/if product from industrial demersal vessels is available in larger volumes, the increased volumes on the market could depress consumer prices with a negative impact on the margins/profits made by women traders. Econometric analysis of price elasticities of demand were beyond the scope of this study. However, while some early consultations completed as part of the in-country missions suggested that such negative impacts could occur, additional and more in-depth consultations concluded in the third mission indicated that:

- Increased volumes of Africa mix on the market may occasionally depress prices, however local demand for fish is strong so such impacts are likely minimal.

¹² This is known to have occurred in some other countries with SFPAs, e.g. Seychelles. However the extent to which this might be the case in the Gambia is unknown.

- Even if they do occur, any such decrease in prices would likely have little overall impact on the profits of women traders as even if prices were lower, volumes for sale would be higher, potentially resulting in little change in overall added value/profits.
- The overall benefit to the country from increased landings in terms of contributions to food security would outweigh any small risk of negative impacts on earnings by women traders, and if prices were depressed this would be good for consumers.

The overall finding from the points and discussion above, is that increased landings by EU demersal trawlers would be supported by, and beneficial to, local stakeholders in the Gambia. This conclusion is further supported by the fact that the availability of fish on the local market may be reduced due to:

- Demand from fish meal factories in the Gambia and the region more widely, which reduces fish available for human consumption.
- Increased demand for fish in Morocco (and other West African countries) due to population increases, quality improvements, and increased purchasing power/wealth, which all means imports from there to Gambia are not guaranteed.

In considering the potential impacts of such landings should they occur, it is not possible to determine quantitatively whether additional landings could be handled by *existing* numbers of people employed in factories (see Annex 1 for numbers of men and women employed) and by existing traders, or would result in *additional* levels of employment. Or to know what the impacts would be on incomes (for factory owners, factory staff, or informal traders). This consideration was thus discussed during in-country consultations, with the general view being that given the low level of activity by EU demersal trawlers (just two vessels for 3 months in 2022), the impacts on employment, incomes, and food security would likely be positive but limited if a part of EU demersal catches were landed in The Gambia. This finding is supported by the data provided below in Section **Error! Reference source not found.** on EU catches by EU demersal vessels, which are low.

5.3.3 Interest and opportunities of EU vessels to land in the Gambia

The **reasons why EU vessels owners don't land tuna catches in the Gambia** include¹³:

- The presence of good/better landings infrastructure, processing plants and vessel support facilities, in other ports in the region where vessels prefer to land their catches.
- Low catches in the Gambian EEZ due to its size meaning they spend little time in Gambian waters close to Banjul.
- Considerable costs involved in terms of time lost by making landings in Banjul of part of their catches when Dakar and Abidjan are ports of choice for offloading.
- The lack of any tuna canneries in the Gambia capable of receiving tuna catches.
- Poor port services available in the main commercial port in Banjul e.g. water, ice, international fuel bunkering, vessel supplies.
- The inability to access the fisheries jetty due to draft/water depth, services (no ice or fuel), and poor/narrow access for vehicles needed to transport fish from the jetty.

As noted above, the SFPA only provides fishing opportunities for 3 demersal hake trawlers, with two vessels having taken up an authorisation in 2022, with vessels also landing all their catch in Senegal. The Gambia has factories and traders which would be interested in buying bycatch for domestic marketing, or/and higher quality fresh catch for processing and export, and indeed such enterprises can already offer prices sufficient to incentivise EU demersal trawlers to land in the Gambia should they wish to do so. However, **the reasons stated above**

¹³ Based on remote consultations, and those in person conducted with EU interests based in Senegal

as to why tuna vessels prefer to land catches in Senegal apply equally to EU demersal trawlers.

In negotiations for a future Protocol, The Gambia could seek to ensure that some part of EU demersal catches are landed in The Gambia, given that:

1. Discussion above has shown that Gambian interests in EU landings of bycatch is high (but less so for tuna).
2. The commercial port does provide for quay wall length and draft to allow for demersal vessel landings.
3. It would be in-line with requirements placed on other foreign vessels.

Given provisions in some other Protocols with other countries which either mandate or incentivise landings, consideration could be given to either a requirement for some *mandatory* landings by demersal trawlers, or to provisions in the Protocol which would *incentivise* landings by reducing access/catch fees for vessels landing catches in The Gambia. The Gambia would need to assess the risks that: i) mandatory landings might result in EU vessels failing to take up authorisations or that the EU would not be willing to include demersal fishing opportunities in a future Protocol thus reducing revenues to the government,¹⁴ and that ii) incentives to landings by demersal trawlers may be unsuccessful for the reasons stated above.

5.3.4 Potential for international cooperation and national projects to support increased EU landings

However much it seems appealing as an idea to bring benefits from EU tuna catches onshore in the form of landings and processing, it is not considered realistic for donor support to bring this about, because:

1. The Gambia's position is unique as a small country with a small EEZ, situated close to other ports which already have well developed landings/port infrastructure, vessels support services, onshore processing capacity, strong local market demand, and established marketing/sales links to export markets.
2. low demand for tuna in the domestic market compared to other species.
3. it is not stated in Government policy or strategy to develop a tuna processing catching or processing sector in The Gambia.
4. investment costs in any onshore processing facilities would almost certainly not be viable when viewed in the context of challenges in attracting landings. A 'build the facilities and they will come' approach is not likely to work.
5. donor support would thus almost certainly fail in incentivising the private sector to invest in tuna processing facilities in the Gambia given that other ports notably Abidjan, Dakar, and Accra/Tema are such an important landings hub for EU vessels.

For all the above reasons it does not seem likely therefore that any programme of development/investment, whether supported by the government or donors/finance providers would be able to unseat other ports as the ports of choice, or that it would be cost effective or likely to succeed. Furthermore, even if tuna processing facilities were built in The Gambia such developments would in any case only result in a displacement of benefits from other African countries to the Gambia rather than generating any net benefits in the region as a whole.¹⁵

¹⁴ A reduction in EU demersal fishing opportunities for which the EU pays would not likely result in government revenues from sale of access/opportunities to other foreign vessels as EU demersal trawlers are targeting deepwater hake, which is not a fishery targeted by other foreign vessels in The Gambia.

¹⁵ Of course The Gambia would have the sovereign right to do so at the expense of other ports and should think of benefits to its own citizens, but the fact remains that at an 'African level' there would likely be no additional benefits.

5.4 Use/employment of Gambian observers and crew by EU vessels

5.4.1 Current employment creation

In terms of the requirements in the Protocol for vessel owners to use crew from ACP and/or The Gambia, and report on crewing nationalities on an annual basis:

- For the Spanish demersal trawlers, the crew complement list provided at the time of inspection in The Gambia shows 20 crew (3 Spanish, 1 non-ACP, and 16 from ACP countries [mostly from Senegal]). The Association of Gambian Sailors (AGS) report that only two Gambians re employed as crew on one of the Spanish demersal trawlers i.e. 10%, not the 20% required by the Protocol. The trawlers also took onboard a Gambian fisheries observer as required.
- No Gambian crew are employed on EU tuna vessels (purse seiners or pole and line vessels). Additionally, it is noted, that the Protocol itself is not specific about to whom the vessel owners should provide data about the nationality of crews, and no data have been provided by EU tuna vessel owners or DG MARE to DoF (either as part of the applications for fishing authorisations or as part of the routine annual provision of catch data by DG MARE). No Gambian observers are deployed on EU tuna vessels, as these vessels take observers in Senegal (as provided for in the Protocol).

5.4.2 Interest and opportunities of EU vessels to employ Gambian nationals

The reason for the failure to comply with the requirements of the SFPA with regards to 20% Gambian crew on the demersal trawler was investigated further with AGS, with the reason for non-compliance stated as being due to a negotiation between AGS and the EU vessel owner which resulted in the vessel paying AGS for not taking onboard the additional two crew in return for a corresponding payment to AGS. This was motivated by AGS seeking to cover its running and training costs but was not in compliance with the content of the Protocol.

The reasons why no Gambian crew are employed on EU tuna vessels are because:

- i) The SFPA does not require it (as long as an appropriate proportion of ACP crew are used).
- ii) EU vessels spend little time fishing in Gambian waters and don't land tuna catches in the Gambia, so making port visits to embark/disembark crew would increase costs.
- iii) Tuna vessels are either French or Spanish owned and operated and crew complements generally speak these languages rather than English, which disincentivises the use of English-speaking Gambian crew.

The reasons why no Gambian observers are used on EU tuna vessels are because:

- i) The SFPA does not require it.
- ii) Vessels take observers onboard in Senegal where they land catches, so embarking observers from the Gambia would increase costs.

5.4.3 Potential for sectoral support funds and international cooperation projects to support increased employment of Gambian nationals on EU vessels

Sectoral support funds from the SFPA have been used for the past two years to fund an activity on 'Training of fisheries observers and seamen to strengthen and increase capacity and effectiveness of the fisheries observer scheme and facilitate language communication', which

have been focussed on observers, but have not resulted in the use of Gambian observers onboard EU tuna vessels for the reasons stated above.¹⁶

5.4.4 Pay and working conditions

There are no specific comments to be made about pay and working conditions onboard EU vessels. Consultations did not reveal any complaints or problems by those few individuals working as crew or observers on the EU demersal trawlers.

¹⁶ It can be observed also that even if such initiatives had been successful, while benefitting The Gambia, they would likely have resulted in less employment from other ACP countries given that employment numbers onboard vessels are constant.

6. How to design and implement the sectoral support component of the SFPAs more effectively: Findings

This section considers issues related to improve the functioning of the sectoral support funding, with a special interest in better integration with international cooperation projects, and especially to support local value chains of small-scale fishery products, gender equality, and food security

6.1 Sectoral support content

Key findings in terms of the content of the sectoral support are:

1. For each strategic axis, one or more strategic targets are specified, and under each axes a series of activities. For each activity the matrices specify 'indicators of follow-up/results', 'reference situation December 2019' 'Final objectives 2025', the 'Responsible Institution', 'Means of verification', and a cost (in the case of the multi-annual matrix with costs allocated by year.)
2. With regards to the proportion of funds allocated to activities which can be considered as directly supportive of: i) artisanal fisheries, and ii) food security (through improved resource management, prevention of IUU fishing, and/or shore-based infrastructure which should serve to reduce post-harvest losses through improved handling of catches):¹⁷
 - 56% of funds allocated in the sectoral support provide direct support for small-scale fisheries through activities involving them or infrastructure for their benefit (with additional funds further benefiting small scale fisheries indirectly, for example through updates to fisheries legislation which underpin small-scale fisheries rights).
 - 59% of funds allocated in the sectoral support provide support to management measures and infrastructure which should serve to improve management or post catch handling, thus contributing to food security.
 - 28% of funds allocated are for activities less directly beneficial to either small-scale fisheries or food security. However even these funds may also enable the Department of Fisheries to fulfil its mandate which includes support for small-scale fisheries and food security, providing funds for example for: i) coordination, implementation, visibility of events, monitoring and reporting for the sectoral support programme; ii) training of staff in the fisheries department; and iii) office running costs and transportation.
3. Activities and axes are well aligned with national policy (which in turn emphasises small-scale fisheries and food security). National policy does not include the development of onshore tuna processing or the development of a national tuna fleet (e.g. of pole and line vessels), for the reason that it would likely be unsuccessful.
4. Indicators and targets in the multi-annual and annual sectoral support matrices are not well specified, and in most cases are qualitative rather than quantitative and thus not easily quantifiable or measurable.
5. With regards to gender, the support matrix is silent on gender issues, with no gender-specific activities itemised and no indicators provided for gender disaggregated data.

¹⁷ Note that some activities funded support both small scale fisheries and food security e.g. small-scale fisheries landing site infrastructure.

6.2 Sectoral support processes

With regards to the processes used as the basis for agreeing the content of the sectoral support and the activities to be funded, mission 2 consultations (and the questionnaire provided by the Department of Fisheries during the desk-based consultation phase) revealed that:

1. Annual reports were prepared for 2020, 2021 and 2022 as required by the Protocol. But none of the annual reports have been made available to the public or to international cooperation partners.
2. Over and above the annual reports, no mid-term evaluation of sectoral support is provided for (by the EU or The Gambia) to assess effectiveness and serve as the basis for adjustments to sectoral support.
3. Small-scale representative organisations were not involved in developing the multi-annual sectoral support matrix prior to the first Joint Committee meeting in 2019 and agreed by that meeting. Processes to involve small scale interests in decision-making, as recommended in the FAO voluntary Guidelines on Small-Scale Fisheries¹⁸ were not followed, and the recommendations contained within those Guidelines on common activities in support of small-scale fisheries were not structurally embedded within the matrix.
4. Once the sectoral support matrix was agreed at the first Joint Committee meeting, a meeting was held to help establish the Platform of Non State Actors in Fisheries and Aquaculture of the Gambia (PONSAFAG) which is now the overarching apex representative body for all small-scale fisheries organisations. However the meeting was not used to systematically communicate to small scale fisheries interests the content of the sectoral support. And representatives from the Community Fisheries Centres (which are also key small-scale fisheries organisations) were not involved.
5. There is no publicly available real-time or periodic reporting on use of sectoral support funds.
6. The EU fisheries attaché based in Senegal engages in remote communication with DoF on an ongoing basis about the sectoral support, and also holds specific meetings/missions to discuss and comment on draft versions of the sectoral support annual implementation reports, and to conduct verification of activities and expenditure reported by DoF under the sectoral support component.
7. While small-scale fisheries organisations and their representatives are involved in many individual sectoral support activities which have been funded during the first 3 years of the Protocol, there is no annual process/meeting used by the Department of Fisheries to: i) report globally on implementation of the sectoral support over the previous year; and ii) discuss priorities and the focus of sectoral support activities in the coming year, should activities need to be amended to reflect new/emerging needs.
8. As a result of the above points, small-scale fisheries interests are currently poorly informed about sectoral support implementation or plans with regards to activities still to be implemented, and have little say over them. The Department of Fisheries are however receptive to greater participation and transparency over the planning and use of sectoral support.

In addition, review of the specific activities funded by the sectoral support revealed that a **number of activities earmarked for funding in multi-annual matrix are now to be funded by other donor projects**. An example includes support for the TRY oyster women's organisation to update their oyster and cockle management plan, which will be funded by the FISH4ACP project, meaning that sectoral support funds will not be needed for this activity.

¹⁸ [SSF Guidelines](#)

The multi-annual matrix has not so far been reviewed by the Joint Committee to amend and update it to reflect funding commitments made by other donors and is too static. The Protocol allows for the multi-annual matrix to be adjusted during the Joint Committee meetings or through and exchange of letters, based on emerging/changing needs. The risk of duplication by donors of funding for activities contained within the sectoral support matrix and in other programmes is heightened because **there is no fisheries sector donor coordination committee in the Gambia.**

Discussions with stakeholders during missions revealed that small-scale fishers' interests are nevertheless broadly aligned with the content of the sectoral support funding and the activities being implemented. **However, the lack of engagement of small-scale fisheries interests in the planning (and any annual revisions that may be necessary) of sectoral support suggest that the sectoral support content and its implementation may not be fully optimal in terms of meeting the real needs and interests of small-scale fishers.** Greater involvement by them would further ensure that sectoral support funds are used in a way that maximises the benefits to them of the sectoral support funding provided.

7. Conclusions and recommendations for a strategy to increase the benefits of the SFPA to the Gambia

This final section builds on the findings presented in preceding sections to generate conclusions and recommendations. The content of this section was presented in draft form at the national workshop, with validation and feedback informing the final text as presented below. The text below thus represents agreements reached by national stakeholders during the workshop.

7.1 EU vessel landings and employment on EU vessels

7.1.1 Conclusions

Positive

1. The relatively low uptake of vessel authorisations (licenses) compared to the number of fishing opportunities provided in the Protocol, and for which the EU pays, means that The Gambia is generating good value for money i.e. it is getting more licenses than it issues (implying however that value for money for the EU may be low)
2. Consideration could be made to mandate or incentivise EU demersal trawlers to land part of their bycatch in Banjul (in line with requirements imposed on other foreign industrial vessels). Increased landings by EU demersal trawlers would be supported by, and beneficial to, local stakeholders in the Gambia. However, *mandated* landings may not be acceptable to the EU, and *incentivised* landings might not result in any landings.
3. With regards to observers, training is already being provided by the sectoral support. Additional investigation is required on this issue to determine whether and how the use of Gambian observers could be increased.
4. Some employment (even though minimal).

Negative

5. No catches by EU tuna or demersal vessels are landed in The Gambia or create any onshore benefits in terms of employment and value added, over and above the financial contributions for access received by the Government.
6. It is not considered realistic to expect (either through mandating or incentivising) EU tuna catches to be landed in Banjul, due to the strong comparative advantage that other ports have as landings hubs for EU vessels. It is also not government policy to encourage the development of domestic capacity in tuna processing (or the catching sector). Viable and evidence-based recommendations to increase EU tuna landings in the Gambia are difficult to identify or justify.
7. With respect to crewing, current Protocol requirements were not being fully respected for the demersal trawl segment in 2022.

7.1.2 Recommendations

1. Further assessment could be conducted of the merits and risks of a future Protocol mandating or incentivising landings of a proportion of EU demersal catches. Such assessment could be completed by the Gambian government, and/or supported by a donor partner.
2. The terms of the Protocol should be respected in full by EU vessels with regards to taking onboard the required proportion of Gambian crew on demersal vessels.

3. Additional investigation is required into the effectiveness of training crew/seamen and how to encourage EU vessels to use more Gambian crew in the future. Such investigation could be completed by the Gambian government, and/or supported by a donor partner.

7.2 Maximising the potential of sectoral support to domestic fisheries value chains, gender equality, and food security (including through enhanced integration with international cooperation projects)

7.2.1 Conclusions

Positive

1. The content of the sectoral support as it currently stands is highly supportive of small-scale fisheries and food security.

Negative

2. Formal and structural integration of small-scale fisheries interests in the processes to develop the sectoral support matrix, and of activities to support them, does not take place.
3. While annual implementation reports provide statements of progress in implementation of the sectoral support, evaluation of the effectiveness of sectoral support at mid-term is not conducted. The EU, as a matter of principle and in line with legal requirements, only commissions ex-post evaluations towards the end of any Protocol prior to negotiations on any future Protocol. This reduces possibilities for adjustments at mid-term to increase the likelihood of effectiveness.
4. Coordination and integration of sectoral support funding with other donor support is virtually non-existent.

7.2.2 Recommendations

Ensuring that sectoral support funding is planned and spent in a way that maximises effectiveness and support to small scale fisheries and food security could be achieved through greater participation by small-scale fisheries interests in planning and monitoring the use of funds, and in improved communication and transparency of the support being provided. It is therefore recommended that:

1. The FAO Voluntary Guidelines on Small Scale Fisheries should be used by the Government when agreeing processes to involve small-scale fisheries interests, and when identifying activities to be supported in the sectoral support matrix.
2. Prior to any discussion at the first Joint Committee meeting of a future Protocol, the Department of Fisheries involve small-scale fisheries organisations in the development of proposals for the activities to be supported by the sectoral support component.
3. During the implementation of the existing and any future Protocols, an annual meeting be held by the Department of Fisheries with relevant stakeholders, including small-scale fisheries organisations to report on the implementation of the sectoral support over the previous year and the plans for its implementation in the coming year. This meeting should take place just prior to the annual Joint Committee meeting each year. This timing would be sensible as: i) the Department of Fisheries have to prepare a report on implementation for the Joint Committee meeting anyway so should have information to-hand; ii) the expressed wishes of small-scale fisheries interests could be kept in mind during the Joint Committee meeting.
4. When Joint Committee meetings take place in Banjul (rather than in Brussels), consideration could be given by the EU and the Department of Fisheries to allowing

observer status to a small number of small-scale fisheries representatives for some parts of the Joint Committee meeting.

5. The Department of Fisheries should make publicly available the annual implementation reports submitted to the Joint Committee, or use an alternative method such as a dashboard on the Department's website to publicise the support planned and implemented. Donor support could be necessary for the latter approach if website design work was involved.
6. Donor support (or sectoral support funds themselves) could be provided for a mid-term evaluation of the effectiveness of sectoral support funding, and to provide inputs to make adjustments and improvements to the sectoral support matrix.
7. Indicators in the sectoral support matrix should be made SMART¹⁹ by the government and agreed with the EU at the next Joint Committee meeting, so that expected outputs and outcomes of the funding can be better assessed and evaluated.
8. Indicators in the sectoral support matrix agreed by the EU and the Government should be gender disaggregated where appropriate (e.g. for trainings) so that women beneficiaries can be better assessed.
9. The ex-post evaluation report expected to be commissioned by the EU in 2024 should provide sufficient information about the effectiveness of sectoral support, not just its contents.
10. A fisheries sector donor coordination committee should be established by the Department of Fisheries with relevant donors, with meetings to take place once every 3 – 6 months.

¹⁹ specific, measurable, agreed, realistic, timebound

Annex 1: List of processing plants approved to export fish and fisheries products to the EU, and employment

No	Name of Company	Name of owner	Nationality of owner	Number of workers	Number of male	Number of female
1	Blu finn fishing company	Ejatou Jallow	Gambian	45	22	23
2	Kendaga fishing company	Dodou David Sinyan	Gambian	23	7	16
3	Rosamond fish Trading	Rosamond Mahoney	Gambian	30	12	18
4	International Pelican Sea Food	Edrissa Sanyang	Gambian	23	10	13
5	Hansen/Maravilla Sea Food	Congelados Maravilla S.A	spanish	71	35	36
6	A+ Fishing enterprise	Juang Sheng Jang	Taiwanese	24	18	6
7	West African Peche limited	Antonio De Siano	Italian	11	5	6
8	Atlantic Sea Food	Ndene Jallow and Musa Jah	Senegalese and Gambian	150	25	125

Source: Department of Fisheries

Annex 2: National workshop report

See overleaf



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Potentials of EU Sustainable Fisheries Partnership Agreements and development cooperation for the sustainable development of local fisheries sectors



Mauritania case study report

Assignment for the German Federal Ministry for Economic Cooperation and Development (BMZ)

DECEMBER 2023

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Acronyms and Abbreviations

ACNAV	Académie Navale / Naval Academy
ADEPA	Association pour le Développement de la Pêche Artisanale / Artisanal Fisheries Development Association
AECID	Agencia Española de Cooperación Internacional para el Desarrollo Spanish Agency for International Cooperation for Development
AF	Artisanal Fisheries
AFD	Agence Française de Développement / French Development Agency
AS	<i>Appui Sectoriel / Sectoral Support</i>
AWFISHNET	African Women Fish Processors and Traders Network
AZFN	Autorité de la Zone Franche de Nouadhibou / Nouadhibou Free Zone Authority
BACOMAB	Fonds fiduciaire du Banc d'Arguin et de la Biodiversité Côtière et Marine / Banc d'Arguin and Coastal and Marine Biodiversity Trust Fund
BCM	Banque Centrale de Mauritanie / Central Bank of Mauritania
BMZ	German Federal Ministry for Economic Cooperation and Development / <i>Development/Bundesministerium für wirtschaftliche Zusammenarbeit und Entwicklung</i>
CAS	Compte d'Affectation Spécial / Special Purpose Account
CCNADP	Conseil Consultatif National pour l'Aménagement et le Développement des Pêcheries / National Advisory Council for Fisheries Management and Development
CECAF	Fishery Committee for the Eastern Central Atlantic
CF	Coastal Fisheries
CM	Circonscription Maritime
CNM	Chantier Naval de Mauritanie / Shipyard of Mauritania
COS	Complexe Opérationnel et Scientifique / Operational and Scientific Complex
CQFMP	Centre de Qualification et de Formation aux Métiers de la Pêche / Qualification and Training Centre for Fisheries
DARE	Direction de l'Aménagement des Ressources et des Études / Resource Planning and Studies Department
DDVP	Direction du Développement et de la Valorisation des Produits / Product Development and Valuation Department
DGERH	Direction Générale de l'Exploitation des Ressources Halieutiques / Directorate General for the Exploitation of Fishery Resources
DG MARE	Direction Générale de l'Exploitation des Ressources Halieutiques / Directorate General for Maritime Affairs and Fisheries
DMM	Direction de la marine Marchande / Merchant Navy Directorate
DPC	Direction de la Programmation et de la Coopération / Directorate for Programming and Cooperation
DPCP	Direction de la Pêche Continentale et de la Pisciculture / Directorate of Inland Fisheries and Fish Farming
DRM	Direction Régionale de la Marine Marchande / Regional Maritime Directorate
EAF	Ecosystem approach to fisheries
EEZ	Exclusive Economic Zone
EPBR	Établissement Portuaire de la Baie du Repos / Nouadhibou Artisanal Fishing Port
ESO	École Supérieure des Officiers / Officers' Training College

EU	European Union
EUD	Delegation of the European Union
EUR	Euro
FAO	Food and Agriculture Organization of the United Nations
FADES	Fonds Arabe de Développement Économique et Social / Arab Fund for Economic and Social Development
FiTI	Fisheries Transparency Initiative
FNP	Fédération Nationale des Pêches / National Fisheries Federation
FPA	Fisheries Partnership Agreement
GCM	Garde Côtes de Mauritanie / Coast Guard of Mauritania
GIZ	German International Development Agency / <i>Gesellschaft für Internationale Zusammenarbeit</i>
HF	High-sea Fisheries
ICCAT	Commission Internationale pour la Conservation des Thonidés de l'Atlantique / <i>International Commission for the Conservation of Atlantic Tunas</i>
ILO	International Labour Organization
IMO	International Maritime Organisation
IMROP	Institut Mauritanien de Recherches Océanographiques et des Pêches / Mauritanian Institute of Oceanographic Research and Fisheries
ISSM	Institut Supérieur des Sciences Maritimes / Higher Institute of Maritime Sciences
JICA	Japan International Cooperation Agency
KfW	<i>Credit Institute for Reconstruction / Kreditanstalt für Wiederaufbau</i>
L2P	Lettre de Politique et de Planification / Policy and Planning Letter
MPEM	Ministère des Pêches et de l'Économie Maritime / Ministry of Fisheries and Maritime Economy
MPN	Marché au Poisson de Nouakchott / Nouakchott Fish Market
MRU	Mauritanian Monetary Unit (New Ouguiya)
NA	Not available
ND	Not Determined
NDB	Nouadhibou
NKT	Nouakchott
NGO	Non-governmental organisation
OESP	Observatoire Économique et Social des Pêches / Economic and Social Observatory for Fisheries
ONISPA	Office National d'Inspection Sanitaire des Produits de la Pêche et de l'Aquaculture / National Office for Sanitary Inspection of Fisheries and Aquaculture Products
OSP	Organisation Socio-Professionnelle / Socio-Professional Organisation
PA	Pêche Artisanale / Artisanal fishing
PADeM	Projet Pêche Artisanale Durable en Mauritanie / Sustainable Artisanal Fisheries Project
PAN	Port Autonome de Nouadhibou / Autonomous Port of Nouadhibou
PAP	Plan d'Aménagement des Pêcheries Fisheries / Management Plan
PC	Pêche Côtière / Coastal fishing
PDA	Pôle de Développement Aménagé / Equipped Development Pole
PDI	Pôle de Développement Intégré / Integrated Development Pole
PDPAS	Projet de Développement de la Pêche Artisanale / Artisanal Fisheries Development Project
PH	Pêche Hauturière / Offshore fishing
PMPAC	Programme de Modernisation de la Pêche Artisanale et Côtière / Programme for the Modernisation of Artisanal and Coastal Fisheries

ProPEP	Programme Prioritaire Élargi du Président / President's Extended Priority Programme
R&D	Research and Development
RFO	Regional Fisheries Organisation
RIM / IRM	République Islamique de Mauritanie / Islamic Republic of Mauritania
SA	Strategic Axis
SCAPP	Stratégie de Croissance Accélérée pour une Prospérité Partagée / Accelerated Growth Strategy for Shared Prosperity
SEWOH	Special Initiative 'A World Without Hunger' / Sonderinitiative 'Eine Welt Ohne Hunger'
SFPA	Sustainable Fisheries Partnership Agreement
SMCP	Société Mauritanienne de Commercialisation du Poisson
	Société Nationale de Distribution de Poisson / National Fish Distribution Company
SNDP	
SPO	Socio-Professional Organisation
SRFC	Sub-Regional Fisheries Commission
SS	Sectoral Support (AS in French)
STCW	Standard Training Certification Watchkeeping
STCW-F	Standard Training Certification Watchkeeping for Fisheries
TPC	Third Partner Country
TFP	Technical and Financial Partner
ToR	Terms of Reference
UNCLOS	United Nations Convention on the Law of the Sea
UNEP	United Nations Environment Programme
USD	United States Dollar
WARFP	West Africa Regional Fisheries Project
WB	World Bank

1. Introduction

This report was prepared by **Poseidon Aquatic Resource Management Limited**, as part of a project to consider 'Potentials of EU Sustainable Fisheries Partnership Agreements (SFPAs) and development cooperation for the sustainable development of local fisheries sectors'. The project was funded by the German Federal Ministry for Economic Cooperation and Development (**BMZ**).

The project considered all SFPAs between the European Union and Partner Third Countries (PTCs) **in Africa. Key research areas of interest** for the project were:

1. How to ensure increased levels of benefits from EU fleet activities in African countries, in terms of fish landings and employment, and contributions to food security and national socio-economic benefits?
2. How to design and implement the sectoral support component of SFPAs most effectively, in particular to support small-scale fisheries, gender equity and food security?
3. How to ensure that complementary activities by donors/development partners can contribute to maximising the benefits of the SFPAs?

Mauritania was selected as one of four priority countries for in-country support and research.

Three missions were completed to Mauritania (all involved visits to both Nouakchott and Nouadhibou) as follows:¹

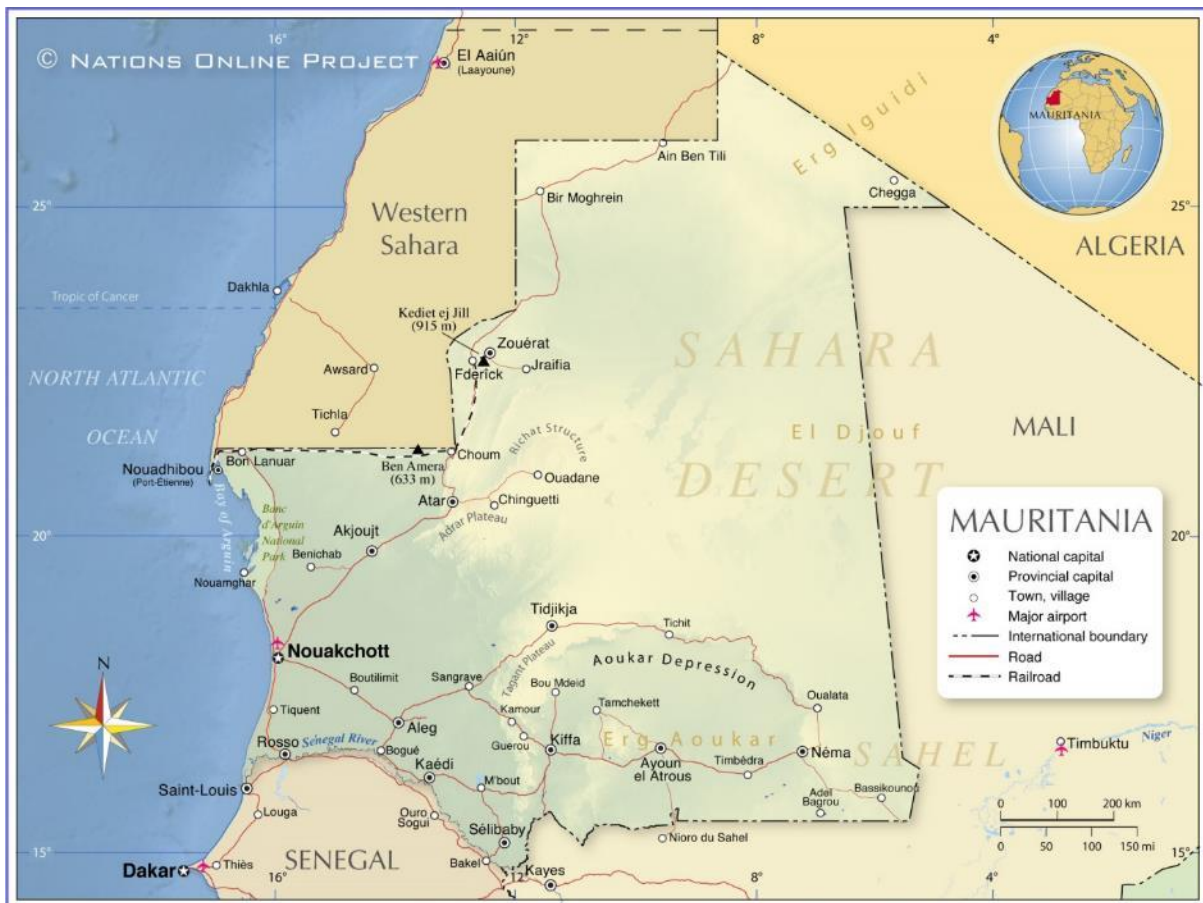
- 6 to 15 November 2022. The main objective of the first mission was to map stakeholders and the policy and legislative environment, to introduce the project to stakeholders and identify a local consultant, and to plan for future missions.
- 28 March to 4 April 2023. The main objective of the second mission was to meet with stakeholders to discuss and explore the main research questions.
- 20 to 27 June 2023. The main objective of the third mission was to further discuss and explore the main research questions with stakeholders, and to hold a national workshop to validate the research's findings, conclusions and recommendations. The workshop report is presented in Annex 1.

This report is not a formal contractual deliverable,² but it details the findings, conclusions and recommendations from the three missions to Mauritania. **The purpose of this report** is to provide the basis for the short Mauritania country case study included in the final project report.

¹ All missions were conducted by Bernard ADRIEN and were supported by the local consultant, Mr. Babana Ould Yahya.

² The four contractual deliverables are: inception report, first progress report, second progress report, final project report.

Figure 1: Map of the Islamic Republic of Mauritania



Source: Nations Online³, extracted on 01.08.2023
 NB: map with no formal legal basis

³ <https://www.nationsonline.org/oneworld/map/mauritania-map.htm>

2. Overview of the SFPA and Protocol

2.1 Overview of the SFPA / Protocol⁴

2.1.1 Protocol 2015-2019 and its two extensions 2019-2020 and 2020-2021

The Protocol previously in force covered the period from 2015 to 2021 and was part of the 2006 Fisheries Partnership Agreement (FPA). It covered an initial period from 16 November 2015 to 15 November 2019 and was extended by one year twice from 15 November 2019, for 2019-2020 and 2020-2021. This 'Sectoral Support' component of the previous Protocol is still ongoing (see section 6). The 2015 - 2019 Protocol was the subject of an ex-post and ex-ante evaluation.⁵

2.1.2 New Protocol 2021-2026

General conditions

A new Agreement,⁶ called the Sustainable Fisheries Partnership Agreement (SFPA), repealed the previous agreement between the European Union and the Islamic Republic of Mauritania, which had been in force since 2006. The Protocol to the SFPA covers the period 2021-2026 (6 years); the conditions it contains are similar to those of the previous Protocol, in particular as regards fishing opportunities for EU vessels and the EU's financial compensation of EUR 57.5 million. The amount of support for Mauritania's sectoral policy ('sectoral support') is altered from EUR 4.125 million per year in 2018, to EUR 16.5 million over 6 years. The Protocol is 'multi-species' and allows access to fishing zones under Mauritanian jurisdiction to around 100 EU vessels from several Member States, for the exploitation of three types of resources, namely demersal species on the continental shelf (fish and crustaceans), small pelagic species such as horse mackerel, sardinella, mackerel and sardines, and tuna species.

Main changes introduced

The Protocol includes the introduction of a number of clauses of major importance,⁷ in particular a **clause on the possible revision** of fishing opportunities, in particular following an evaluation of their utilisation rate before the end of the 2nd year of application of the Protocol (Article 7 of the Protocol). This evaluation will make it possible to adjust the fishing opportunities and the financial contribution paid by the Union in the light of the actual use made of these opportunities by Union vessels.

Among the technical measures aimed at improving the attractiveness of the European fleet, while ensuring the preservation of the resource, the new Protocol provides in the short term, among other things, for the **modification of the zoning** concerning the small pelagic category following the favourable scientific advice already given by the independent Joint

⁴ Reminder of the definitions contained in this Protocol: 'Fisheries Agreement' means the Partnership Agreement on sustainable fisheries between the European Union and the Islamic Republic of Mauritania; 'Protocol' or 'this Protocol' means this Protocol implementing the Fisheries Agreement, its Annexes and its Appendices.

⁵ Retrospective and Prospective Evaluation of the Protocol to the Sustainable Fisheries Partnership Agreement between the European Union and the Islamic Republic of Mauritania. FS, Poseidon and MegaPesca, Final Report, 25 March 2019.

The purpose of this report is not to provide a precise update of that assessment, but to highlight important events and activities that have taken place since then in relation to the respective Protocol.

⁶ Sustainable Fisheries Partnership Agreement between the European Union and the Islamic Republic of Mauritania, Official Journal of the EU L.439 of 08/12/2021. Implementation Protocol, Official Journal of the EU L.439/3 of 08/12/2021. Council Decision (EU) 2022/1448 of 18 July 2022.

⁷ Source: https://oceans-and-fisheries.ec.europa.eu/news/eu-and-mauritania-announce-conclusion-negotiations-new-fisheries-agreement-2021-07-29_fr. Author: Directorate-General for Maritime Affairs and Fisheries, 29/07/2021. NB: It is curious that this document mentions a duration of five years, whereas the Partnership Agreement (OJ of 8/12/2021) states that 'This Agreement shall apply for a period of six years from its entry into force' (Article 19).

Scientific Committee, **subject to the adoption of a management plan for this fishery** (see paragraph 2.2.1 for the current situation of this Plan).

Other measures concern **the improvement of data collection** through the application of electronic systems allowing daily monitoring and better surveillance of the activities of fishing fleets, the clear definition of by-catch limits, more detailed provisions for scientific observation, improved conditions and requirements for the embarkation of crew.

The new Protocol includes a new annex specifically dedicated to **transparency** and which aims to facilitate the collection of data and the dissemination of information concerning the activities of all fleets operating in Mauritanian waters. It should be recalled that **Mauritania has been part of the FiTI initiative⁸ since the end of 2018, currently as a ‘candidate country’**.

It also provides for a series of measures aimed at facilitating and improving the implementation of **sectoral support**, with particular attention to scientific research, especially with regard to enhanced monitoring of the state of stocks, including through the implementation of scientific observation programmes.

Actions in favour of the **protection of marine environments** and ecosystems also continue within the framework of the new Protocol through projects benefiting the **national coastal parks**. Actions aimed at strengthening the **control and surveillance** capacities of fishing activities as well as the **administrative capacities** of the ministerial departments responsible for the implementation of the new national strategy are eligible for sectoral support.

In addition, part of the sectoral support budget is also dedicated to the improvement and control of **sanitary conditions throughout the** production and processing chain of fisheries products in order to improve the economic impact at national level.

Finally, a specific area of intervention is dedicated to actions aimed at supporting **small-scale fisheries and coastal communities**.

Compared to the previous Protocol, the modalities for implementing sector support have been both **simplified and strengthened**, in order to take into account the principles of transparency, efficiency, effectiveness and sound financial management. The monitoring of the budget is ensured by the Joint Committee provided for in the agreement (see below) as well as by the regular monitoring of activities carried out in cooperation with the European Union Delegation in Nouakchott.

Establishment of a Joint Committee

As in the case of the previous agreement, a Joint Committee composed of representatives of both Parties is set up. It is responsible for monitoring the implementation of this Agreement and may adopt amendments to the Protocol to this Agreement. The Joint Committee: (a) supervises the performance, interpretation and application of this Agreement; (b) defines and evaluates the **annual and multiannual programming of the financial contribution**;

⁸ The FiTI is a global multi-stakeholder partnership that defines for the first time the information that National Authorities must publish online about their marine fisheries sector. By making fisheries management more transparent and inclusive, the FiTI promotes informed public debate on fisheries policies and supports the sector's long-term contribution to national economies and the well-being of citizens and businesses that depend on a healthy marine environment.

The L2P 2022-2024 (see paragraph 4.2) states that 'Two other key governance issues should be highlighted. The first is improving transparency, with particular emphasis on consolidating the efforts and progress made by Mauritania in the framework of the Fisheries Transparency Initiative (FiTI). Mauritania is indeed, through its 2018, 2019 and 2020 FiTI reports, an example on the African continent for its transparency efforts in the fisheries sector and maritime economy. Such a commitment must be supported and strengthened in order for Mauritania to comply with FiTI standards. Mauritania's application to the FiTI was accepted in late December 2018.'

(c) provides the necessary liaison on matters of mutual interest relating to fisheries; (d) acts as a forum for the amicable settlement of any disputes regarding the interpretation or application of this Agreement.

The Joint Committee is to meet at least once a year, alternately in Mauritania and in the EU, or in another place agreed by the Parties. The conclusions of the meetings of the Joint Committee are to be recorded in minutes signed by the Parties.⁹

Fishing opportunities¹⁰

As in the case of the previous Protocol, the negotiated fishing opportunities are divided into seven technical categories: Category 1: vessels fishing for crustaceans except lobster and crab, Category 2: trawlers (not freezer trawlers) and bottom longliners fishing for black hake, with the subcategory 2a introduced since April 2017 for freezer trawlers, Category 3: vessels fishing for demersal species other than black hake with gears other than trawls, Category 4: tuna purse seiners, Category 5: pole-and-line tuna vessels and surface longliners, Category 6: pelagic freezer trawlers, and Category 7: pelagic freshwater fishing vessels.

Category 7 has so far not been the subject of any licence applications from European shipowners. An eighth category, 'Cephalopods', is mentioned for the record as all foreign vessels were banned from fishing for this type of fish in the Mauritanian EEZ in 2012. **EU vessels are ultimately represented by all categories 1 to 6.**

Fishing opportunities are governed by a maximum number of vessels present in the area at any one time and by maximum catch volumes (except in the latter case for tuna vessels in categories 4 and 5). Categories 1 to 3 mainly concern **Spanish** fleets, categories 4 and 5 **Spanish and French** fleets, and category 6 large pelagic vessels **from Western Europe** (mainly Dutch and German) and **Eastern Europe** (mainly Lithuanian, Latvian and Polish).

The Table 1 below shows the fishing opportunities and fees of the 2021-2026 Protocol by category, compared to the stock status of the corresponding resources.

⁹ According to the Agreement, Article 14.

¹⁰ 'Fishing opportunities' means a quantified right to fish, expressed in terms of catch and/or fishing effort (Article 1 of the Protocol).

Table 1: Exploitable potential and level of exploitation of fisheries resources in the Mauritanian EEZ in relation to the fishing opportunities provided for in the EU/IRM Protocol

Species groups	Species and Area of distribution	Level of exploitation	Overall TAC (t)	EU / IRM Protocol category and vessel types	Number of vessels operating at the same time, TAC for EU vessels and amount per tonne fished (*)
Crustaceans	Coastal shrimp, deep-water shrimp, lobster, crab. Area of distribution: national	Overexploited coastal shrimp and lobster, other species moderately exploited	7,500	Category 1 Crustacean fishing vessels except lobster and crab	15 vessels 5,000 t 450 EUR
Hake	Area of distribution: mainly national	Fully exploited species	10,000	Category 2 Black hake trawlers (non-freezers) and bottom longliners	6 vessels 6,000 t 100 EUR
				Category 2a Black hake trawlers (freezers)	6 vessels Black hake: 3,500 t, EUR 100 Squid: 1,450 t, EUR 575 Cuttlefish: 600 t, EUR 250 By-catch: EUR 90
Demersal fish (other than hake)	Sea bream, grouper, umbra, sole, pike-perch, selachians etc. Area of distribution: mainly national	Fully to overexploited species	87,000	Category 3 Vessels fishing for demersal species other than black hake, with gear other than trawl - (on ice)	6 vessels 3,000 t EUR 105
Large tuna species	Skipjack, bigeye, yellowfin tuna. Area of distribution: transnational (species managed by ICCAT)	Fully to overexploited species	30,000	Category 4 Tuna seiners (freezers)	29 vessels 14,000 t (**), EUR 75 in years 1 to 3 and EUR 80 in years 4 and 5, fee of EUR 1,750 per vessel
				Category 5 Pole-and-line tuna vessels and surface longliners	15 vessels 7,000 t (**), EUR 75 in years 1 to 3 and EUR 80 in years 4 and 5, fee of EUR 2,500 per vessel
Small pelagics	Horse mackerel, round sardinella, flat sardinella, sardines, mackerel, ethmalose, anchovies, scabbardfish. Area of distribution:	Moderately to fully exploited species, except round sardinella and horse mackerel (overexploited)	1,350,000	Category 6 Pelagic freezer trawlers	19 vessels 225,000 t (***), EUR 75/t sardines and sardinella, EUR 140/t horse mackerel and mackerel, EUR 123/t other pelagics
				Category 7 Pelagic fishing vessels	15,000 t (****), same fees as category 6

Species groups	Species and Area of distribution	Level of exploitation	Overall TAC (t)	EU / IRM Protocol category and vessel types	Number of vessels operating at the same time, TAC for EU vessels and amount per tonne fished (*)
	transnational			on ice	
Cephalopods	Octopus, squid, cuttlefish. Area of distribution: national	Octopus fully to overexploited, other species moderately to fully exploited	42,000	NA (No fishing allowed for foreign vessels)	NA
Benthopelagic fish	Courbine, mullet, tassergal. Area of distribution: transnational	Fully to overexploited species	-	NA	NA
Bivalve molluscs	Venus shellfish	Not or little exploited species	300,000	NA	NA

(*) The amount per tonne fished is paid by the shipowner

(**) Reference tonnage

(***) With an authorised overrun of 10% which does not affect the financial contribution paid by the EU for access

(****) If these fishing opportunities are used, they are to be deducted from the total allowable catch (TAC) under category 6 (number of vessels not specified)

NB: Vessels are also subject to the payment of a fiscal tax, based on their tonnage.

Source: Policy and Planning Letter 2022 - 2024 (L2P - 2022-2024) / IMROP and current Protocol

Technical visit¹¹

An annual technical inspection, carried out in the port of Nouadhibou,¹² is compulsory for all EU vessels operating in the Mauritanian fishing zone. On completion of the technical inspection, a certificate of conformity is issued to the captain of the vessel for a period of validity equal to that of the licence and extended, free of charge, for vessels renewing their licence during the year. For the category of pelagic vessels, the certificate specifies the vessel's capacity to carry out **transhipments**.

This technical inspection serves to check the conformity of the technical characteristics and the equipment on board and **to verify that the provisions concerning the Mauritanian crew are fulfilled**.

Landing obligations: Fee in kind¹³

Owners of EU **pelagic** freezer trawlers and **shrimp vessels** (in respect of their fish by-catch) fishing under the Protocol must contribute **2% of their pelagic catches** transhipped or landed at the end of a trip to the policy of distributing fish to populations in need. **For category 6 freezer trawlers, the 2% is to be calculated on the total catch** of all species, regardless of its commercial value, and is added to the total allowable catch (TAC). The catch remitted as fee in kind shall reflect the species composition of the total catch on board

¹¹ Annex 1, Chapter II of the Protocol.

¹² Or in a foreign port to be agreed in the case of categories 4 and 5.

In addition, a technical survey must be carried out following changes in tonnage or changes in the fishing category of a vessel involving the use of different types of fishing gear.

¹³ Annex 1, Chapter III of the Protocol.

the vessel at the time of transshipment of the 2%.

However, for vessels targeting horse mackerel and mackerel, the 2% may be taken from catches of size L, or alternatively size M. **For Category 1 vessels, the 2% shall be calculated on the total by-catch of fish.**

Catches are to be handed over to the Société Nationale de Distribution de Poisson (SNDP), which sells them to the needy population in Mauritania. The delivery of catches under the fee in kind may be carried out **by landing at the quayside or by transshipment in the bay.**

The fee in kind expressly excludes any other form of imposed contribution. In no case may it be converted into a monetary equivalent or be the subject of a debt.

It is further specified that “the Société Nationale de Distribution de Poisson should draw up a report each year on the use of this fee in kind, its beneficiaries, the quantities disposed of and the conditions of distribution of these quantities. This report is to be evaluated by the Joint Commission”.

In summary:

- Only freezer vessels, category 1 (**shrimp vessels**) and category 6 (**pelagic vessels**) are subject to the fee in kind;
- The fee is 2% of the total **catch** for category 6 and 2% of the total **by-catch** for category 1;
- Fees in kind are remitted to the **SNDP** for distribution on the national market.

It should also be recalled that this fee in kind also applies to foreign licensed and Chinese pelagic vessels (3%) as well as to Turkish chartered seiners under national regime (2%).¹⁴

Landings and transshipments¹⁵

Landings

Vessels of the demersal, shrimp and fresh pelagic fleets¹⁶ are subject to the landing obligation, without prejudice to the following derogations:

- The demersal fleet (except for derogations) is subject to the obligation to land in a Mauritanian port. Specific derogations are granted to the shrimp fleet at the request of the shipowner during periods of extreme heat.

Categories 1, 2 and 2a and 3 are therefore subject to the landing obligation.

- The obligation to land does not necessarily imply an obligation to store and process.
- **The last trip** (the trip that precedes the departure from Mauritanian fishing zones for an absence that cannot be less than three months) is not subject to the landing obligation. In the case of shrimp vessels, this period is two months.
- An EU vessel landing in a Mauritanian port shall be exempt from any tax or charge having equivalent effect other than the port taxes and charges which, under the same conditions, are applied to Mauritanian vessels.
- Fish catches benefit from a “customs tax free” economic regime in accordance with the Mauritanian legislation in force. Consequently, they are exempt from all customs procedures and duties or taxes having equivalent effect on its entry into the Mauritanian port or on its export, and are considered to be goods in ‘temporary transit’ (‘temporary storage’).

¹⁴ Fisheries resources are targeted by fishing fleets operating under the national regime (chartered or flying the Mauritanian flag, and having to land in Mauritania) and by fishing fleets operating under the foreign regime within the framework of fisheries agreements (e.g. agreement with the EU, agreement with Senegal) or within the framework of free licences.

¹⁵ Annex 1, Chapter V of the Protocol.

¹⁶ It should be recalled that category 7 of the Protocol (fresh pelagics) has not been represented so far.

- The shipowner decides on the destination of the production of his ship. It can be processed, stored customs tax free, sold in Mauritania or exported (in foreign currency). Sales in Mauritania, destined for the Mauritanian market, are subject to the same taxes and levies as those applied to Mauritanian fisheries products. Profits can be exported without additional charges (exemption from customs duties and taxes).

Transshipments¹⁷

All pelagic freezer vessels are subject to the obligation to tranship at the quayside or in the bay of a Mauritanian port, except for the last fishing trip. In addition:

- An EU vessel transshipping in a Mauritanian port is exempt from any tax or charge having equivalent effect other than the port taxes and charges which, under the same conditions, are applied to Mauritanian vessels.
- The last fishing trip (before leaving Mauritanian fishing zones for an absence of at least three months) is not subject to the transshipment obligation.

Category 6 vessels are therefore subject to conditions which are broadly the same as for the other categories mentioned above.

Obligations to embark Mauritanian seamen¹⁸

The conditions of embarkation of Mauritanian seamen stipulated in the SFPA¹⁹ are as follows:

- During its fishing activities in the Mauritanian fishing zone, each EU vessel must take on board qualified seamen designated by the vessel's agent, in agreement with the shipowner, from the names on the list updated by the competent Mauritanian authorities.
- The International Labour Organisation (ILO) Declaration on Fundamental Principles and Rights at Work and other relevant ILO Conventions applies to Mauritanian seamen embarked on board EU vessels.
- Where Mauritanian seamen are embarked, employment contracts should be drawn up between the shipowner's agent and the seamen in consultation with the competent Mauritanian authorities. These contracts should guarantee Mauritanian seamen the social security cover due to them under the law applicable to their contract.
- Where Mauritanian seamen are embarked, their wages are to be paid by the shipowner. The basic wage conditions, i.e. the minimum wage before the addition of bonuses, granted to Mauritanian seamen shall be fixed either on the basis of Mauritanian legislation or the minimum standard laid down by the ILO for seafarers, whichever is the higher. Other benefits should not be less than those applied to seamen from other ACP countries performing similar duties.
- Where the number of qualified Mauritanian seamen on board EU vessels does not reach the minimum level laid down, the shipowner must pay a flat-rate allowance of EUR 20 for each seaman not signed on per day of fishing activity in the Mauritanian fishing zone.
- The minimum number of Mauritanian seamen to be embarked is as follows:
 - for tuna seiners, **one person** per vessel;
 - for pole-and-line tuna vessels and tuna longliners, **three persons** per vessel;

¹⁷ The term 'transshipment' is only used in the Protocol in the case of pelagic vessels. This operation may take place at quayside or in the bay. It refers to the transfer of cargo from a fishing vessel directly to a reefer vessel.

¹⁸ Protocol, Annex 1, Chapter IX and Appendix 11.

¹⁹ Protocol, Annex 1, Chapter IX and Appendix 11.

- for shrimp and demersal vessels, **60% of the crew** rounded down, with officers (ship's master, auxiliary or coastal master, engine assistant and first engineer officer) not included in this count;
- for pelagic trawlers, **60% of the personnel operating in production functions** (factory, packing and freezing).²⁰
- The taking on board of Mauritanian trainee officers in support of the Ministry's training and qualification policy is encouraged. If the owner of the fishing vessel takes on board Mauritanian trainee officers, their number is deducted from the minimum number of Mauritanian seamen required.
- The Ministry should ensure that each seafarer meets at least the following requirements:
 - is familiar with the basic safety vocabulary in one of the following working languages: French, Spanish or English, and has a certificate attesting to the knowledge of one of these languages;
 - is in possession of a valid Mauritanian passport and seaman's book (or equivalent document);
 - holds and is in possession of a valid certificate attesting to the fact that he/she has received basic safety-at-sea training for fishing vessel personnel in accordance with the international standards in force, in particular the International Convention on Standards of Training, Certification and Watchkeeping for Fishing Vessel Personnel (STCW-F Convention)²¹ of the International Maritime Organisation;
 - is in possession of a valid medical certificate.

Scientific cooperation for sustainable fisheries²²

The current Protocol provides that “during the period of application of this Protocol, the Parties must cooperate to monitor the evolution of the state of resources and fisheries in the fishing zone. To this end, a meeting of the **independent Joint Scientific Committee** should be held at least once a year, alternately in Mauritania and in the EU.

No later than six months from the date of application of this Protocol, Mauritania is required to adopt a **plan for the sustainable management of small pelagic fisheries** applicable to all fleets operating in Mauritanian waters. This plan is to be notified to the EU not later than one month before the date of its application. It may be subject to evaluation by the independent Joint Scientific Committee, where appropriate”. Section 2.2.5 below presents the situation regarding this Plan.

Cooperation between economic operators²³

The Protocol provides for the Parties to encourage contacts and contribute to cooperation between economic operators, including in connection with sectoral support, in the fields of i) the development of the Nouadhibou Free Zone or other zones, ii) the development of MPAs (Banc d'Arguin and Dialing), iii) port management, iv) the development of fishing industries for human consumption, v) shipbuilding and repair and the manufacture of fishing materials and gear, vi) the development of exchanges aimed at improving vocational training, vii) the commercialisation and marketing of fisheries products and viii) aquaculture and the blue economy.

²⁰ In the context of the obligation to take on board two observers, one of the two will be deducted from this minimum number of Mauritanian seamen.

²¹ See paragraph 2.2.1, subparagraph ‘certification’, concerning the situation of Mauritania with regard to this Convention.

²² Article 9 of the current Protocol.

²³ Article 12 of the Protocol.

These various areas of potential cooperation between economic operators are to be seen in relation to the areas foreseen by the sector support (see Section 6.1) as well as the Policy and Planning Letter (L2P) 2022-2024 (see Section 4.2).

2.2 Access component - Implementation of the Protocol

2.2.1 Fishing authorisations

The Table 2 below shows, by category of vessel, the fishing authorisations (licences) granted to EU fishing vessels i) under the 2015-2019 Protocol with its 2 extensions (for the years 2017 to 2021) and under the current Protocol (for the year 2022).

Table 2: Fishing authorisations for EU vessels under the SFPA - Period 2017 - 2022

	2017	2018	2019	2020	2021	2022	Total	Average / year	No. of different vessels
Category 1 - Crustaceans									
No. of licenced vessels	14	17	9	8	4	14	66	11	25 (24 ES and 1 GR)
No licences x trim. total	28,5	59	24,5	12	19	39	182	30,3	
No vessels x an	7,1	14,8	6,1	3,0	4,8	9,8	45,5	7,6	
	1 GR 2 months	1 GR 8 months							
Category 2 - Fresh hake									
No. of licenced vessels	3	4	6	4	4	4	25	4,2	6, all ES
No licences x trim. total	12	16	17	13	16	16	90	15,0	
No vessels x an	3,0	4,0	4,3	3,3	4,0	4,0	22,5	3,8	
Category 2 bis - Frozen hake									
No. of licenced vessels	8	7	6	6	5	3	35	5,8	9, all ES
No licences x trim. total	13	12	6	16,5	15	11	73,5	12,3	
No vessels x an	3,3	3,0	1,5	4,1	3,8	2,8	18,4	3,1	
Category 3 - Demersals									
No. of licenced vessels	4	6	7	5	5	5	32	5,3	7, all ES
No licences x trim. total	15	18	24	15,5	20	15	107,5	17,9	
No vessels x an	3,8	4,5	6,0	3,9	5,0	3,8	26,9	4,5	
Category 4 - Tuna purse seiners									
Nb bateaux licenciés	21	21	21	21	20	18	122	20,3	24
ES	11	11	12	12	10	8	64	10,7	13
FR	10,0	10,0	9,0	9,0	10,0	10,0	58	9,7	11
Nb licences x trim. total									
Nb bateaux x an	21	21	21	21	20	18	122	20,3	
Category 5 - Pole and line and longline tuna vessels									
Nb bateaux licenciés	12	12	13	10	7	4	58	9,7	13
ES	11	11	12	9	6	3	52	8,7	12
FR	1	1	1	1	1	1	6	1,0	1
Nb bateaux x an	12	12	13	10	7	4	58	9,7	
Category 6 - Freezer pelagic trawlers									
No. of licenced vessels	16	12	8	7	5	5	53	9,2	18
No licences x trim. total	36	30	21,5	16,5	16	13	133	23,1	
No vessels x an	9	7,5	5,4	4,1	4,0	3,3	33,3	5,8	
Nationalities									
LVA	3	3	2	2	2	2			4
LTU	3	3	3	3	3	2			4
POL	3			1		1			2
ES	2	2	2	1					3
NLD	2	2	1						2
DE	3	2							3

NB (Annex 1, Chapter 2 of the Protocol): licences are issued for three-month periods, except for the tuna vessels (12 months)

(GR: Greece; ES: Spain; FR: France)

Source: Mission compilation from EUD data

Therefore the equivalent of **about thirty non-tuna EU vessels and about thirty tuna vessels** were granted licences on an annual basis during the period under consideration.²⁴

²⁴ The licences for tuna seiners, pole-and-line vessels and longliners are annual but the vessels may only be present in the Mauritanian fishing zone for part of the year. In contrast, the licences for the other categories are quarterly and better reflect the actual presence of the corresponding vessels in the zone.

It should be noted that the EUD reports that the process of issuing licences has been greatly improved in the last 2-3 years, since applications are sent to Brussels electronically and no longer by mail. The process is also smooth at the level of the MPEM (the DPHC).

Characterisation of EU vessels and port frequentation

Table 3 below summarises these fishing authorisations and briefly characterises each category of vessel in terms of landings and port frequentation and in terms of crew (foreign and Mauritanian).

Categories 1, 2 and 2 bis and 3 are subject to the landing obligation, category 6 to the transshipment obligation. These operations are mainly carried out in Nouadhibou.

- The categories of freezer vessels (category 1, shrimp vessels and 2 bis, hake vessels) disembark at the quayside at the Port Autonome de Nouadhibou (PAN), directly into containers parked at the quayside.
- The categories of fresh vessels (category 2, trawlers and hake longliners) and category 3, demersal fishing vessels) unload at the quayside at the PAN, directly into isothermal trucks that will transport the fish under ice to the EU or to the markets of Spain, Portugal in particular.
- Category 6 vessels disembark at the PAN or tranship in the bay.

Table 3: Summary of EU vessels authorised to fish under the SFPA - Period 2017-2022

Category 1 - Crustaceans	<ul style="list-style-type: none"> • Spanish fleet (except 1 Greek occasionally) • Approximately 8 ships all year round on average; strong peak in 2018, strong reduction between 2019 and 2021, strong increase in 2022 • Freezer trawlers of 26 to 29 m • 15-day fishing trips • Average cargo per trip: 10 t • Landing arrangements: quay-truck • Crew: 17 to 19 including 2 to 3 officers; obligation: 60% of the crew excluding officers, i.e. 7 to 9 Mauritanian seamen
Category 2 - Fresh black hake	<ul style="list-style-type: none"> • Spanish fleet • Approximately 4 vessels all year round on average (relatively stable number) • Fresh bottom trawlers and longliners from 29 to 32 m • 7-10 day fishing trips • Average cargo per trip: 40 t • Landing arrangements: quay-refrigerated truck • Crew: 17 to 18 including 2 to 3 officers; obligation: 60% of the crew excluding officers, i.e. 7 to 8 Mauritanian seamen
Category 2a - Frozen hake	<ul style="list-style-type: none"> • Spanish fleet • Approximately 3 vessels all year round on average (number varying between 1.5 and 4.1) • Freezer trawlers from 42 to 49 m • 45-day fishing trips • Average cargo per trip: 310 t • Landing arrangements: refrigerated containers • Crew: 8 to 10 including 3 to 4 officers; obligation: 60% of the crew excluding officers, i.e. 9 to 11 Mauritanian seamen
Category 3 - Fresh Demersal	<ul style="list-style-type: none"> • Spanish fleet • Approximately 4.5 vessels year-round on average (number varying between 3.8 and 6.0) • Fresh trawlers of 25 to 27 m • 7-day fishing trips • Average cargo per trip: 10 t • Landing arrangements: refrigerated truck • Crew: 8 to 9 including 2 to 3 officers; obligation: 60% of the crew excluding officers, i.e. 6 to 7 Mauritanian seamen

Category 4 - Seiners	<ul style="list-style-type: none"> • Spanish and French fleets (in equal numbers) • Approximately 20 vessels all year round on average (annual licence); stable number • Freezer purse seiners • Fishing trips of several weeks • Average cargo per trip: ND • Do not land in Mauritania • Crew: 23; obligation: 1 Mauritanian seaman
Category 5 - Pole-and-line vessels + tuna longliners	<ul style="list-style-type: none"> • Mainly Spanish fleets (one French vessel) • Approximately 10 vessels all year round (annual licence); sharp reduction since 2020 • Fresh baitboats from 27 to 50 m, fresh longliners from 22 to 55 m • Fishing trips: baitboats ND, longliners ND • Average cargo per trip: baitboats ND, longliners ND • Do not land in Mauritania • Crew: 32; obligation: 3 Mauritanian seamen
Category 6 - Pelagic freezers	<ul style="list-style-type: none"> • Fleets mainly from Eastern Europe (Lithuania, Latvia and Poland) and Western Europe (the Netherlands and Germany) • Approximately 6 ships year-round on average; virtual disappearance of Western European ships since 2020; residual number of Eastern European ships since 2020 • Freezer trawlers from 93 to 136 m • Fishing trips of 15 to 40 days • Average cargo per trip: 2,000 t • Landing arrangements: transshipment • Crew: 69 to 72 including 8 to 10 non-production; obligation: 60% production crew i.e. 32 to 38 Mauritanian seamen

Source: Mission compilation

2.2.2 Small Pelagics Management Plan

General - The current SFPA provides that ‘Mauritania shall adopt a plan for the sustainable management of small pelagic fisheries, applicable to all fleets operating in Mauritanian waters’.

Indeed, small pelagic fisheries are currently experiencing difficulties due to the high level of exploitation of many stocks, the absence of concerted regional management, the high rate of by-catch of demersal species and catches of juveniles, the virtual absence of an Ecosystemic Approach to Fisheries (EAF), and insufficient domestication of the activity, which reduces the added value and the contribution to national employment.

This Plan responds to the need to reduce fishing effort in the coastal zone in order to spare most of the distribution area of the round sardinella, a species that is currently very overexploited, and other sensitive species. **It is therefore crucial, particularly as it conditions access for the EU pelagic fishing fleet.**

A proposal for a Small Pelagics Management Plan²⁵ was the subject of a session of the Advisory Council for Fisheries Development (CCNDP) **in November 2022**, following which the Plan was formalised in the form of an **Order**²⁶. The Plan is for a period of five years.

The main measures recommended are summarised below:

- Gradual evolution of the current global quota towards specific quotas per species group (clupeidae-carangidae and scombridae), per segment and possibly per season;
- Progressive implementation of water supply and biodiversity protection measures ;
- Redefinition of the current segmentation of the inshore fishery (segments 2 and 3 of the inshore fishery), considering the whole of segment 3 as deep-sea fishery;

²⁵ Ministry of Fisheries and Maritime Economy. 2022. Plan d'Aménagement des Petits Pélagiques dans la ZEE Mauritanienne. 91 pages. This Plan was developed under the GIZ component of the Promopêche Project.

²⁶ Not yet published.

- Prohibition of by-catch of mullet, megrim, demersal fish including hake for pelagic fisheries;
- Control of waste management;
- Promotion of the emergence of a national coastal fleet by assigning preference zones to allow better targeting of less exploited species and better protection of those in difficulty;
- Determination of accompanying technical measures (zoning, fishing gear, catch sizes, etc.). **The main measures concerning category 6 EU vessels are detailed below:**
 - Promotion of a more homogeneous distribution of the effort in the Mauritanian EEZ in order to reduce the fishing pressure on the overexploited Clupeidae (Sardinella and Ethmalose) and to relieve the northern zone by the application of fiscal incentive measures;
 - The exploitation of existing infrastructures (Port of Tanit, Port of Ndiago), which would allow to alleviate the fishing pressure on the northern zone and to integrate the pelagic segment more into the national economy with the promotion of a better valorisation of the catches of small pelagics (canning, quality freezing, fish filleting, etc.);
 - Promotion of consultation for the adoption of a regional (Regional Fisheries Organisation - RFO) or bilateral (Cooperation Agreement) management framework. In the meantime, an adaptive and reactive management method should be put in place to temporarily compensate for the absence of an RFO for small pelagics;
 - Promotion of exports of pelagic products to Africa by taking advantage of the African Free Trade Area that Mauritania has recently ratified. This will be accompanied by the adoption of a number of instruments in terms of quality standards, phytosanitary measures, rules of origin, etc.
 - Creation of conditions for access to small pelagic fish for people in the hinterland of the country at affordable prices
 - Promotion of fish for human consumption and not for processing into fishmeal and oil;
 - Improving training and supervision to create more jobs;
 - Creation of tables of indicators, some of which will serve as benchmarks and cut-off points for management;
 - Definition of a specific research programme for the monitoring of small pelagic resources on a national scale and promotion of a sub-regional approach;
 - Improvement of the tools for monitoring and controlling the activity of the sub-sector.

Zoning - One of the key technical measures for the EU fleets, and one which has been the subject of intense negotiations between the EU and the IRM, concerns zoning. Until 2012 the large Dutch trawler fleet²⁷ focused on catching clupeids – sardinellas – which are generally more abundant close to the shore, and then regularly frequented the Mauritanian fishing zone. It gradually disengaged from 2012 onwards as the fishing zone in which it operated was no longer accessible to it: due to the stock status of the sardinellas stock and to protect it, Mauritania and the EU agreed from the 2012 Protocol, and as a precautionary

²⁷ The Pelagic Freezer Trawler Association (PFA) is made up of some fifteen deep-sea trawlers, including the 126 m 'Afrika'. The number of fishing authorisations for this fleet (licences issued by the MPEM) is currently only anecdotal; only 4 to 5 'Russian-type' vessels (Lithuanian and Latvian), which are more oriented towards the fishing of larger clupeids, have been operating in Mauritania for several years.

approach, to push the internal limit of the EU industrial pelagic fishing zone further from the shore especially in the north.

The new zoning, as foreseen in the Small Pelagics Management Plan is presented in Table 4 and then visualised in Figure 2. This new zoning is common to the Pelagic PC segment (purse seiners and pelagic trawlers over 40m and under 60m in length), and the High Seas Fishery (PH) segment (all ice and freezer trawlers, including the EU small pelagic freezing fleet through the SFPA) and thus eliminates a stumbling block between pelagic freezer trawlers and the large Turkish purse seiners. Before this new zoning, the PC segment including the latter purse seiners, had for 'advantage' to be able to fish closer to the shore than the PH one, with a more important fishing pressure on the sardinellas stock.

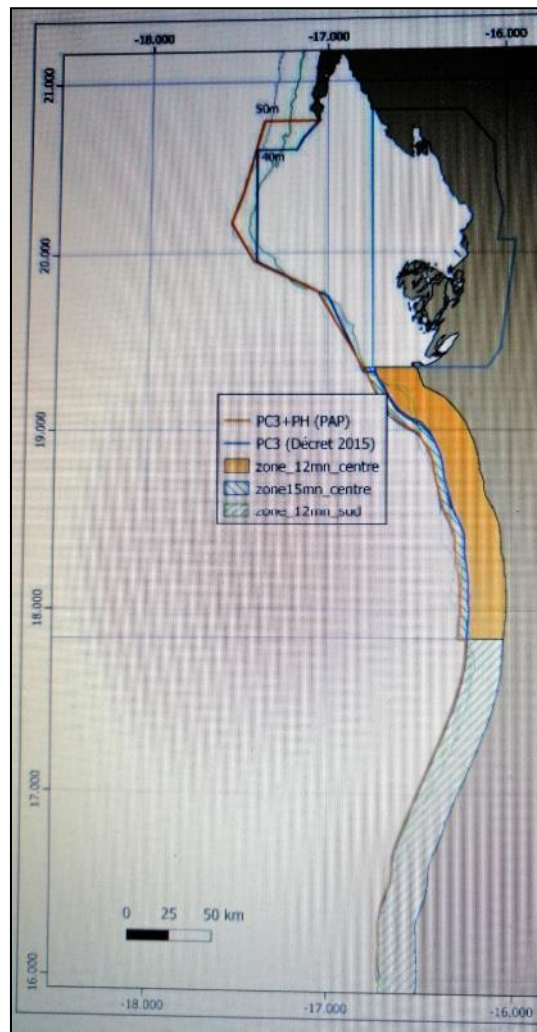
Since 2012, the Dutch fleet has focused its strategy on fishing zones outside Mauritania (notably Angola, the Pacific and Northern Europe). Even if the new zoning is *a priori* favourable to them (it is essentially the same as the zoning in force in 2012), it remains to be seen to **what extent they will or will not decide to frequent the EEZ again in a significant way**, taking into account other factors such as port infrastructure and services in Nouadhibou, and marketing conditions.

Table 4: New zoning for small pelagic offshore fisheries

Northern zone :	Fishing is permitted west of the line joining the following points:	
	Latitude	Longitude
	20° 46.20'N	17° 03.00'W
	20° 46.20'N	17° 21.60'W
	20° 21.40'N	17° 28.60'W
	20° 10.40'N	17° 32.60'W
	19° 56.90'N	17° 24.70'W
	19° 46.38'N	17° 03.40'W
19° 19.20'N	16° 47.40'W	
Central zone	Between parallels 19° 19.20'N and 17°50'00" N fishing is permitted west of the 15-nautical mile line from the baseline	
South zone	South of latitude 17°50'00" N fishing is permitted west of the 12-nautical mile line from the baseline	

Source: Small Pelagics Management Plan

Figure 2: New zoning for the offshore small pelagic fishery



Source: Small Pelagics Management Plan

First Catch Sizes - The Plan indicates that the current first catch sizes for small pelagics in Mauritania appear to be appropriate.

Mesh size - The Plan does not foresee any change in the mesh size of the pelagic trawl (40 mm mesh).

Catch monitoring and surveillance - In general, the Plan recommends the following for both offshore and coastal fisheries (not specifically for EU vessels):

- The obligation for vessels to transmit their fishing logs to the GCM within a very short period of time (the GCM deplores in particular the delay or failure to communicate fishing logs from certain foreign vessels);
- Increasing the level of inspection of vessels ;
- Increasing the minimum period of control of the vessel and its cargo during transshipments;
- Strengthening the scientific observation system on board (see below) and ;
- Data processing on a quarterly basis.

2.2.3 Scientific cooperation for sustainable fisheries

IMROP stresses that, in general and not specifically for EU vessels, it does not have enough scientific observers to ensure good coverage: it has a total of only **10 observers at present** (down by half compared to a few years ago, due to non-renewal of departures), who work mainly on coastal fisheries. **It is therefore likely that the obligation to take on board scientific observers provided for under the current Protocol is not being observed.** However, the case of tuna seiners is specific in that, within the framework of ICCAT, a system of on-board observers has been put in place, entrusted to a consultancy firm through the Institut de Recherche en Développement (IRD).

One way to increase scientific observer coverage could be the recruitment of contractual staff by IMROP, or the creation of an independent observer corps.

2.3 Sectoral support component – Implementation of the Protocols

2.3.1 Areas of intervention

In accordance with Article 8 of the current Protocol, the financial support for the promotion of responsible and sustainable fisheries is composed of eight areas of intervention, as follows:

- Area 1: Preservation of the marine and coastal environment;
- Area 2: Strengthening monitoring, control and surveillance of fishing activities;
- Area 3: Strengthening scientific research;
- Area 4: Strengthening the sector's information system;
- Area 5: Hygiene and quality of fishery products;
- Area 6: Infrastructures for the promotion of human consumption of fishery products;
- Area 7: Support to artisanal fisheries and coastal communities; and
- Area 8: Technical assistance.

However due to delays in implementation of the SS under the old Protocol, a new SS matrix with detailed budget breakdown was not available during the missions made by the consultant. The **Error! Reference source not found.** below therefore presents the balance of SS implementation over the period of the previous Agreement (2008-2019), the SS programming over the duration of the 2015-2019 Protocol (as revised in 06/2022) and the SS Programming for the first extension period (2019-2020) as validated in 02/06/2022, according to these different intervention areas.

²⁸ 2021-2026 Protocol, Annex II.

Table 5: Summary of SS implementation (2008-2019 period) and SS programming (2015-2019 and 2019-2020 periods)

Intervention area (*)	Beneficiary	Execution SS - 2008 - 2019		Programming SS 2015-2019 (revised 03/06/2022)		Programming SS 2019-2020 (validated 02/06/2022)		Programming 2015-2020	
		Activities	Amount (Euros)	Activities	Amount (Euros)	Activities	Amount (Euros)	Total amount (Euros)	% total amount
Area 3: Strengthening of scientific research	IMROP	Funding of IMROP and DARE, stock assessment on the EEZ	7.600.000	Rehabilitation of buildings and laboratories; viabilisation of the IMROP compound in Nouakchott; laboratory equipment; rehabilitation and equipment of research vessels; participation in international scientific meetings	1.362.500	Acquisition of vehicles and equipment; monitoring of berthing; training, scientific campaigns; 5 scientific workshops; construction of buildings (3 PDs; offices and laboratories in Nouakchott)	1.376.200	2.738.700	13
Area 5: Hygiene et qualité de fisheries products	ONISPA	Sanitary inspection, support for export of fisheries products and monitoring of marine habitats	4.200.000	NA	0	Training, equipment, accreditation	238.000	238.000	1
(**)	ACNAV	Training on fishing techniques and fish processing	4.200.000	Acquisition of simulators for the École Supérieure des Officiers - Training of Trainers	1.000.000	NA	0	1.000.000	5
Area 2: Strengthening of Fisheries Monitoring, Control and Surveillance	GCM	Fisheries surveillance and fight against IUU	21.200.000	Drydocking of Awkar; repair of the engine of Limreya; acquisition of 4 aluminium boats without engines; acquisition of 2 inflatable boats for sea rescue; rescue, diving and nocturnal equipment; substitution of THEMIS infrastructure; acquisition of AIS satellite	2.562.500	Drydocking of patrol boat Arguin; acquisition of a 12 m boa; extension of MARLIN PRO (electronic logbook); study on missions and means of the GCM; acquisition of vehicles and equipment	2.500.000	5.062.500	25
	CCSM	Coordination of sea rescue	2.300.000		0	NA	0	0	0
Axe 1: Préservation du milieu marin et côtier	PND	Mise en œuvre du plan d'aménagement et de gestion	500.000	Gestion conservatoire; Cogestion avec les populations locales; Communication et éducation environnementale;	500.000	NA	0	500.000	2
	PNBA	Surveillance de la zone maritime, appui aux populations, équipements, constructions et rénovations de bâtiments du Parc	5.000.000	Equipements, véhicules, matériel; Travaux; Etudes (Prospective territoriale, symposium scientifique)	1.000.000	NA	0	1.000.000	5
	BACOMAB	Fiduciary fund, sustainable funding for PNBA and PND	3.100.000	Contribution to the Fiduciary fund Funding of activities programmed between Fiduciary fund, PNBA and PND	1.200.000	NA	0	1.200.000	6
Area 6: Infrastructure for the promotion of human consumption of fisheries products	CNM	Setting-up of the first industrial shipyard in Mauritania	6.800.000	NA	0	NA	0	0	0
	Min. Équ. et Trans.	Co-funding of the construction of Tanit Fisheries Port	14.500.000	Finalisation of the works of Tanit Port	8.500.000	NA	0	8.500.000	41
	Marché de poisson de NKT	Rehabilitation and upgrading standards	3.500.000	NA	0	NA	0	0	0
	EPBR	Artisanal Fisheries Port of Nouadhibou : rehabilitation and upgrading standards	1.800.000	NA	0	NA	0	0	0
	PAN	Rehabilitation of port infrastructure	1.700.000	NA	0	NA	0	0	0
	Transport and energy	Infrastructure and studies	5.700.000	NA	0	NA	0	0	0
Axe 4: Strengthening of the sector information system	MPEM / Cabinet	Strengthening of the legal and institutional governance framework	5.500.000	Coordination Unit for the implementation of the Sectoral Support	375.000	Operation of the Coordination Unit	5.000	380.000	2
	MPEM / Cabinet		0	NA	0	Fight against COVID 19	5.800	5.800	0
TOTAL			87.600.000		16.500.000		4.125.000	20.625.000	100

(*) as defined in Annex II of the Protocol 2021-2026

(**) Training is not defined as a specific intervention area

Source: prepared by the mission, based on information from MPEM and the EUD

All the main areas of intervention²⁹ defined in the Protocol were supported during the period 2008-2019, for a total of EUR 87.6 million. During the periods 2015-2019 and 2019-2020, for a total of EUR 20.63 million, the construction of the Port of Tanit (41% of the total), the GCM (25%), IMROP (13%), the Preservation of the Marine and Coastal Environment Area (13%) and ACNAV (5%) were supported more specifically.

The SS funds are now channelled through the Special Appropriation Account (Compte d'Affectation Spécial - CAS) created for this purpose and managed by the MPEM, which facilitates the process (the funds used to transit through the Treasury).

The implementation of the SS over the period 2008-2022 can be summarised as follows:

- **1st phase** - Period 2008-2012 - Amount of EUR 65 million, mainly corresponding to investment expenditure (notably GCM, IMROP, ONISPA). Problem of absorption capacity on the part of the institutions/MPEM. **Existence of an outstanding balance** (for an amount of EUR 2 million, including in particular approximately EUR 0.5 million with the PAN).
- **2nd phase** - Period 2013 - 2014. EUR 6 million. Mainly co-financing of the Port of Tanit. **Phase closed.**
- **3rd phase** - Protocol 2015 - 2019. EUR 16.5 million. New procedures introduced, notably the fact that programming is agreed jointly in the Joint Committee, a tranche is only made available when the previous one has been fully accounted for. Additional funding of EUR 8.5 million for Tanit. Integration of the environment topic (support to the PNBA and the PND). The SS amount was fully disbursed, in three annual instalments. A final pre-report was presented at the June 2022 Joint Commission meeting in Brussels. Adjustments/developments were required. **The revised report was to be presented at the last MC meeting (30 Nov / 2 Dec 2022).**
- **4th phase** - 1st extension of the 2015-2019 Protocol - Period 2019-2020. Amount of EUR 4.125 million. Few beneficiaries (4): IMROP, GCM, ONISPA, Cabinet (see **Error! Reference source not found.** above). **An implementation report was prepared and was to be presented at the last JC meeting.**
- **5th phase** – 2nd extension of the 2015-2019 Protocol - Period 2020-2021. Amount of EUR 4.125 million. The programming is not complete: two successive proposals have already been drawn up, concerning IMROP, CMG and ONISPA, with the EU wishing to see a focus on the training aspects. **A final proposal was to be presented at the last JC meeting.**³⁰
- **6th phase** - New Agreement 2021-2026. **The programming process is not yet underway**, as each potential beneficiary institution is yet to identify its needs. It is also planned that part of the 'PK 93 development' project would be financed under the current Protocol. A co-funding of EUR 2.5 million with KfW for the construction of the Operational and Scientific Complex - COS (GCM/IMROP cluster) is foreseen in Nouadhibou.

The GCM indicates that the training needs of some of its personnel (seamen for its patrol boats, electricians, fisheries inspectors (9 existing) are not yet covered and wishes to mobilise the SS to update its Training Plan.

As an initial indication, fisheries monitoring, scientific research, implementation of management plans, long-term TA projects, actions with fisheries federations and civil society would be considered as priorities by the EUD.

²⁹ However, training (the responsibility of ACNAV) is not defined as a priority Area and, conversely, Area 7 (support for artisanal fisheries and coastal communities) and Area 8 (technical assistance) are not identified as such.

³⁰ The mission was not able to gather precise information on this subject.

There have therefore been significant delays in the SS envelopes of the previous Agreement, leading to a delay in the programming of the SS of the 2nd extension then of the SS of the Protocol to the current SFPA. The next meeting of the Joint Committee at the end of November - beginning of December 2022 was to be decisive in remedying this situation, but did not succeed fully in doing so.

2.3.2 Operationalisation of the Coordination Unit

According to the wishes of the Mauritanian authorities and the EU expressed over several years, the implementation and operationalisation of the 'Sectoral Budget Support Coordination Unit'³¹ for the rigorous management and monitoring of the funds and activities financed by it, and more broadly, to ensure coherence with the interventions of other partners, remains on the agenda.

Although this Unit was officially created at the end of 2021,³² it is still not operational. It seems that the MPEM and the EU have finally agreed on the recruitment of a national expert. The practical modalities of the recruitment (according to ToR still to be elaborated) and more broadly, all the means to make this Unit work were to be decided and finalised during the last Joint Commission (end Nov. - beginning Dec. 2022).

2.3.3 The sectoral support processes

The main observations regarding the SS processes are as follows:

1. The national stakeholders representing the small-scale/artisanal sector were not involved or consulted by government, for the design of the multi-annual programme for the sectoral support funding provided under the SFPA, or during its implementation.
2. There is no publicly available real-time or periodic reporting on use of sectoral support funds.
3. The EU fisheries attaché based in the EUD in Nouakchott is intensively involved with the MPEM (in particular, the Programming and Cooperation Directorate - DPC) for the preparation of annual sectoral support implementation reports and of subsequent annual plans, which are analysed during the Joint Committee meetings.
4. Overall, small-scale fisheries interests are currently poorly informed about sectoral support implementation or plans with regards to activities still to be implemented, and are hardly involved in their definition.

³¹ Article 8: 'Sectoral support shall be implemented with the support of a coordination unit, responsible for following up the decisions of the joint commission'. It should be noted that the operationalisation of this Unit was already foreseen in the previous Protocol.

³² Order No 1238 of 02/11/2021. Article 1: The Unit is created in application of the 2021-2025 Protocol in the framework of the RIM/EU SFPA. Article 6: The Unit has a budget from the State Budget and a Sectoral Support Envelope dedicated to its functioning, the annual amount of which is determined by the RIM/EU Joint Committee. Article 10: The staff of the Unit, which is coordinated by the Director General of DGERH, President of the Mauritanian Party to the Joint Commission, comprises members including an experienced assistant, an administrative and financial officer, a secretary and a driver, appointed by the Minister.

3. Stakeholders

3.1 Introduction

Prior to the first mission to Mauritania, desk work identified many stakeholders of relevance to the SFPAs and its Protocol in Mauritania. However, the stakeholder mapping was primarily for the purpose of the targeted consultation and was thus not fully comprehensive. In this section a more complete listing of stakeholders is presented.

The tables in this section follow the convention used in the inception report and first progress report of categorising stakeholders by whether they are:

- Involved with implementing the SFPAs/Protocol (governing authorities and DG MARE), Category 1;
- Are directly affected by it (the private sector), Category 2; or
- Have an interest in it (notably NGOs/civil society organisations, but also other Ministries in the PTC not involved with implementation such as enforcement agencies), Category 3.

3.2 National and EU stakeholders

3.2.1 National entities

The ministry in charge of fisheries in Mauritania is the Ministry of Fisheries and Maritime Economy (MPEM). Decree No. 211/2017 of 29 May 2017 sets out the powers of the Minister and the organisation of the central administration of his department.

The MPEM has 7 central directorates: the Directorate General for the Exploitation of Fishery Resources (DGERH), the Directorate for Programming and Cooperation (DPC), the Directorate for the Development of Resources and Studies (DARE), the Directorate for the Development and Valorisation of Products (DDVP), the Directorate for Inland Fisheries and Fish Farming (DPCP), the Directorate for the Merchant Navy (DMM)³³ and the Directorate for Administrative and Financial Affairs (DAAF).

The DARE is involved in the elaboration and monitoring of the application of fisheries agreements. The DARE's role includes managing and monitoring quotas by segment and by type of concession (fishery), participating in the drafting of fisheries agreements and validating statistics for the sector (Decree No. 211/2017). A Technical Committee on Statistics (CTS) meets regularly to harmonise statistics in the upstream and downstream fisheries sector.

The MPEM is supported in its tasks by two institutions under its supervision or authority.

- The Mauritanian Coast Guard (GCM) - Created in 2013 by Law No. 2013-041, the GCM, based in Nouadhibou, is responsible for monitoring, control, civil surveillance of fishing activities, search and rescue at sea in the waters under the jurisdiction of the RIM. Thus, the GCM is notably in charge of the collection, processing and storage of all catch data and must ensure their reliability and integrity (Order No. 199/MPEM of 9 March 2016).
- The Mauritanian Institute of Oceanographic Research and Fisheries (IMROP) - This is a public administrative institution based in Nouadhibou. It ensures the scientific collection and analysis of fisheries data and, as a whole, the understanding of the functioning of aquatic ecosystems through the collection and analysis of environmental data. IMROP is in charge of providing scientific advice to the DARE in

³³ The DMM is also involved in safety, security and pollution prevention aspects (i.e. the issue of waste from fishing vessels, see section 5.2.2).

the process of determining Total Allowable Catches (TACs) by fishery (circular of 1 March 2016) in application of the National Strategy 2015-2019. IMROP is the national partner of the EU scientific fisheries research institutes in the SFPA Joint Scientific Committee.

Other institutions, public bodies and publicly owned companies are under the supervision of the MPEM:

- The Office National d'Inspection Sanitaire des Produits de la Pêche et de l'Aquaculture / National Office for Sanitary Inspection of Fisheries and Aquaculture Products (ONISPA) designated as the competent authority for the control and inspection of the healthiness of fishery products;
- The Mauritanian Fish Marketing Company (SMCP³⁴);
- Nouakchott Fish Market (MPN);
- The Société Nationale de Distribution de Poisson / National Fish Distribution Company (SNDP);
- The Chantier Naval de Mauritanie / Naval Workshop of Mauritania (CNM)
- The fishing port of Tanit.

The Naval Academy (ACNAV) is a military institution of higher maritime education under the Ministry of National Defence. Its programming is carried out according to an interministerial approach with the MPEM and the Ministry of Higher Education. It includes the following institutions:

- The Centre de Qualification et de Formation aux Métiers de la Pêche / Qualification and Training Centre for Fisheries (CQFMP), based in NKT and NDB, with several training centres along the Mauritanian coast;
- The Institut Supérieur de Sciences de la Mer / Superior Institute for Marine Science (ISSM) for training up bachelor degree, based in NDB.

3.2.2 Socio-professional organisations linked to small-scale fisheries

General overview

The National Federation of Fishermen (FNP) (with a specific section for small-scale fisheries) has historically been the main stakeholder representing the fishing industry (fishing and processing). However, numerous federations emerged between 2000 and 2010, in particular to represent the small-scale fisheries sub-sector (fishing and 'mareyage' or fish trading – be it 'collecteurs' or local traders, 'distributeurs' or suppliers to the processing industry) and 'exporteurs' or exporters): FNPA, FLPA and FMDEM. One of the particularities of the fisheries socio-professional organisations is that they represent both employers (boat owners) and fishermen, as well as a wide range of activities in the fisheries sector (fish trading, processing, etc.).

In order to rationalize the interventions of these various organisations, a 'fisheries co-management committee' has been established in Nouakchott and is now deemed to be a major interlocutor for the fisheries administration.

Description

The professionals of the fisheries sector are represented by numerous federations:

- The National Federation of Fishermen (FNP); it is composed of 6 sections: deep-sea vessels, small pelagics, factories, service providers, artisanal fishing in zone north,

³⁴ It has a monopoly on the export of frozen fishery products caught in Mauritanian waters. Its role is also to monitor exports and the international market for fishery products and, since mid-2017, it has also been monitoring exports of fishmeal and fish oil.

artisanal fishing in south zone; the FNP claims nearly 20 000 members. Due to its history, the FNP represents the profession in many consultations, and is a leading stakeholder in the current fisheries sector. It is member of the National Union of Owners of Mauritania. The FNP initiated in 2013 a programme to increase local fish trade: 7 of their members have opened fish retail shops (one per member) in Nouadhibou, where fish are sold at a reduced price (small pelagics 25/30 UM per kilo; demersal fish 50/150 UM, compared to 300-400 on the local market) for the benefit of the poorer population. It plans to expand this number up to 14 fish retail shops in Nouadhibou, and start the same kind of initiative in Nouakchott.

- The National Federation of Artisanal Fishermen (FNPA); created in 2008, the FNPA has about 7 000 members, including about 2 300 women. The FNPA has gained considerable importance in recent years and is involved in several governance mechanisms (e.g. Transparency Initiative - FiTI); it has been supported by the EU and the International Labour Organisation (ILO).
- The Free Federation of Artisanal Fishermen (FLPA); created in 2006, with 2 sections (NDB and NKT), it focuses on fishing activities as such (1 200 vessels) and women retail fish vendors; FLPA has about 2 700 members. It acts as general secretary of the Executive Board of the West African Association for the Development of Artisanal Fisheries (ADEPA). During the mission, this federation was adamant to see improvements made to remedy critical situations in terms of (i) the organization of the EPBR and (ii) fish unloading, handling and processing in the Tcherka area of Nouadhibou³⁵.
- The Mauritanian Federation of Fish Traders (FMM); created in 2007, the FMM has about 1 100 members, with a women section comprising 500 members in NDB. It is currently designing a project for this section, on improved fish processing (as opposed to the traditional fish processing carried out – essentially for shark 'tollo' and rays by male processors from Nigeria, under precarious hygiene conditions – see illustrations in Annex 3).
- The Mauritanian Fishing Federation of Fish Traders, Collectors, Distributors and Exporters (FPMEDC) ; it is mainly represented in the northern zone (Nouadhibou), where it federates a very important part of the demersal fish and cephalopods traders (the members account for about 85 % of the catches unloaded at the EPBR).³⁶

Recently, a consultation and dialogue platform between socio-professional organisations (SPOs), public authorities and Technical and Financial Partners (TFPs) called 'Comité de cogestion des pêches de Nouakchott' has been created, which brings together FNP, FNPA, FLPA, MFF and Mauritania 2000. During the mission, this Committee expressed the wish to be more involved in the decision-making process at MPEM level, in particular with regard to the PK 93 project under development (see section 3.3.2 below).

3.2.3 Civil society

As far as the civil society is concerned, there are few NGOs directly active in the fisheries sector, except for the NGO 'Mauritania 2000'. This NGO was created in the 1990's and implemented some activities involving women in fisheries, in partnership with NOVIB, Oxfam, the Spanish cooperation and the Artisanal Fisheries Development Project (PDPAS). In particular, it set up a regional trading network for dried fish and is member of the African Women Fish Processors and Traders Network (AWFISHNET). It has been engaged in advocacy since 2005, and was recruited by the World Bank-funded West Africa Regional

³⁵ See illustrations in Annex 3. 200 to 300 artisanal fishing vessels operate from this base. No plans are made by the Government to improve it.

³⁶ Source : Rapport de l'Expert en communication n°01/ 2019 du projet KfW 'Modernisation du port de pêche artisanale de Nouadhibou'

Fisheries Project (WARFP) for the implementation of the Fisheries Transparency *Initiative* (FiTI) at regional level. Even though the NGO is a member of the Consultative Committee of the MPEM, it is not involved in the design and implementation of the SFPA sectoral support, and would recommend this support to include a component on improvement of the local fish distribution network (points of retail sale). It is presently working on small-scale agriculture in the east of the country, under EU funding, on a salt production project in Nouadhibou, in partnership with the State Secretary for Woman's Condition and on entrepreneurship development for youth and women with the WB. It has not been involved in the implementation of the Promopêche project.

An NGO promoting women's entrepreneurship, the Federation of Women Entrepreneurs of Mauritania was identified during the mission. It is presently seeking funding for a project on improved fish processing in Nouadhibou.

NGOs involved in the protection of the marine environment in the Banc d'Arguin (PNBA) and Diawling (PND) national parks were also recipients of grants through the BACoMaB fund, co-financed by the EU through the SS of the SFPA EU - IRM.

Finally, some twenty seafarers' unions are reportedly active in Mauritania, the main ones being signatories of a Collective Agreement.

To varying degrees, all of these organisations represent stakeholders in the EU/IRM SFPA and are listed in the Table 6

Table 6 below.

Overall, the Table 6 below shows the legend used in the Inception Report and the first implementation report of the Study, categorising stakeholders as Category 1, 2 or 3.

Table 6: National stakeholders and representatives of TFPs in Mauritania

Cat.	Institution/Entity	Position	Name	Contact details	redacted
	NOUAKCHOTT				
1	Ministry of Fisheries and Maritime Economy (MPEM) and institutions under its supervision				
		Minister	Mr. Mohamed Abidine Mayif		
		Permanent Secretary	Mr. Ahmed Sidahmed Die		
	Directorate General of Fisheries Resources (DGRH)	Managing Director	Mr. Sidi Ali		
	Directorate of Offshore and Coastal Fisheries of the DGRH (DPHC)	Director	Mr. Abdoul Dia		
	Programming and Cooperation Directorate (DPC)	Director	Dr. Barham		
	Directorate for Resource Planning and Studies (DARE)	Director	Mr. Lamine Camara		
		Vice Director	Mr. Ahmed Ould Taleb Moussa		
	Product Development and Valorisation Department (DDVP)	Director	Mr Mohamed Ould M'Bareck		
	National Directorate of Maritime Affairs (DMM)	Director	Mr. Mohamed Yeslem Ahmed El Hacen		
	National Company for Fish Distribution (SNDP)	Director	Mr. Mohamed Cherif Ahmed		
		Director Nouakchott	Mr. Didi Mohamed		
	General Inspection of the Ministry	General Inspector	Mr. Babana		
	Advisor to the Minister	EU Technical Advisor	Mr. Christophe Breuil		
	SFPA Coordination Unit	Advisor	Mr. Karim Fall		
	Qualification and Training Centre for Fisheries (CQFMP)				
	Delegation of the European Union (EUD)	Fisheries Attaché	Mr. Éric Lunel		
		Programme Coordinator	Ms. Valentina Genova		
		Programme Coordinator	Mr. Jorge Valiente		
	MISCELLANEOUS				
1	GIZ	PADeM Coordinator	Ms. Verena Stiebing		

Cat.	Institution/Entity	Position	Name	Contact details	redacted
3	Mauritanie 2000	General Manager	Mme. Nedwa		
2	Artisanal Fisheries National Federation (FNPA) et Artisanal Fisheries Co-Management Committee NKT	FNPA (General Secretary) FMM FMEDC (member) ASSPCI (National coordinator)/FNPA FLPA (GS) FNP	Mr. Abdarrahman Cherif Mr. Iba Mar Diakhate Mr. Mohamed Lemine Sidi Aly Mr. Ba Ibrahima Mr. Abdarahman Beba Mr. Kanu Dreye		
2	Mauritanian Fish Traders Federation (FMM)	Advisor	Mr. Dia		
2	NORFISH	General Manager	Ms. Aziza		
NOUADHIBOU					
1	Autonomous Port of Nouadhibou (PAN)	General Manager Adjoint	Mr. Dieng Amadou Boubou Farba		
		Technical advisor DG	Mr. Alioune Samoury		
1	Coast Guard of Mauritania (GCM)	Commander	Colonel Bereid		
		Vice-Commander	Mr. Cheikh Lehmoud		
1	Maritime Authority (CM)	Manager	Mr. Mohamed Zehave		
1	Mauritanian Institute for Oceanography and Fisheries Research (IMROP)	General Manager	Mr. Ejiwen Mohamed El Hafedh		
		Vice General Manager	Mr. Mohamed El Moustapha Bouzouma		
1	Naval Academy (ACNAV)	Commander	Mr. Aboubekrine		
		Education Director	Mr. Boubacar Elemine		
2	National Company for Fish Distribution (SNDP)	Director.	Mr. Chighali		
		Dep. Head	Mr. Ahmedou Hamahoullah		
FISHERIES FEDERATIONS					
2	National Fisheries Federation (FNP)	President	Mr. Hamadi Baba Hamadi		
		General Secretary	Mr. Mohamed Mahmoud Sadegh		
		Vice General Secretary	Mr. Ahmed Moktar Khoubah		
		President of Artisanal Fisheries section	Mr. Sid' Ahmed Abeid		
2	Artisanal Fisheries Free Federation (FLPA)	General Secretary	Mr. Haroune Lebaye		
2	Fishers, Fish Traders, Distributors and Exporters Federation (FPMEDC)	President	Mr. El Moustapha Med Mahmoud		
		Assistant	Ms. Toutou		
PRIVATE SECTOR					

Cat.	Institution/Entity	Position	Name	Contact details	redacted
2	EU Shipowner agent	Manager	Mr. Taher		
2	3M Seafood	Technical Manager	Mr. Moulaye Jouly		
2	Mauritania Pelagic GIE	General Manager	Mr. Boughourbal Aziz		
2	Cap Blanc Pélagique	General Manager	Mr. Frido Werleman		
		HR and Operations	Ms. Aïcha		
2	SACOP (EU Shipowner agent)	General Manager	Mr. Guemine Cheiguer		
2	NOT (EU Shipowner agent)	General Manager	Mr. Abbas Bougherbal		
2	SOPAC (EU Shipowner agent)	General Manager	Mr. Ahmed Hamadi		
2	MIC (EU Shipowner agent)	General Manager	Mr. Meyloud Le khal		
2	ACOMAT (EU Shipowner agent)	General Manager	Mr. Ahmed		
2	SAMAPECHE (EU Shipowner agent)	General Manager	Mr. Samouri		
MISCELLANEOUS					
2	Federation of Women Entrepreneurs of Mauritania (FENFAM)	Vice President	Ms. Saadani Ahmednah		
1	ONISPA	General Manager	Mr. Aly Dartige		
1	Établissement Portuaire de la Baie du Repos (EPBR)	General Manager	Mr Taleb		
1	Autorité de la Zone Franche de Nouadhibou	General Manager	Mr. Taleb Sid'Ahmed		
OTHERS					
1	Tanit Fishing Port	General Manager	<i>Mr. Mohamed Ahmed Mahmoud</i>		
1	Ndiago Fishing Port	General Manager	<i>Mr. Isselmou Sidi El Moctar</i>		

Source: elaboration by the mission

3.2.4 EU stakeholders concerned by the EU/IRM SFPA

The following Table 7 shows the main stakeholders involved in the EU/IRM SFPA. As far as possible, the main EU **shipowners** corresponding to the different categories (1 to 6) of the Protocol have been identified, as represented by the different Nouadhibou consignees mentioned in the Table 6Table 5 above.

Table 7: EU stakeholders concerned by the EU/IRM SFPA

Organization	Category / Type	Main role
Unit B3 DG MARE, Belgium	1 / EU	Responsible for contracting the ex-ante and ex-post evaluations, negotiating the SFPA and the Protocol once the relevant EU institutions have given a negotiation mandate, and then managing the implementation of the Protocol (as a member of the Joint Committee).
MAPA - International Fisheries Relations Department, Spain	1 / EU MS govt.	Spanish management authority responsible for offshore fishing vessels and third country fishing agreements
DG AMPA	1 / EU MS govt.	French management authority responsible for offshore fishing vessels and fisheries agreements with third countries
Pesqueras Nores Marin	2 / EU private sector	Spanish owner of a demersal trawler whose vessels have obtained a fishing licence in Mauritania
ANACEF OPRMAR	2 / EU private sector	Organisations representing Spanish demersal trawler owners
ORTHONGEL	2 / EU private sector	Organisation representing French purse seiners (category 4 of the Protocol)
OPAGAC and ANABAC	2 / EU private sector	Organisations representing Spanish purse seiners (category 4 of the Protocol)
Compagnie Francaise et Via Ocean	2 / EU private sector	French purse seiners whose vessels have obtained a fishing licence in Mauritania (category 4 of the Protocol)
Yellowfin tuna SA Cantabrica de Tunidos Atuneros Congeladores	2 / EU private sector	Spanish purse seiners whose vessels have obtained a fishing licence in Mauritania (category 4 of the Protocol)
OPNAPA	2 / EU private sector	Organisations representing Spanish tuna longline owners (category 5 of the Protocol)
San Francisco CB Iribar Zulaika CB Pilar Torre	2 / EU private sector	Spanish tuna longliners whose vessels have obtained a fishing licence in Mauritania (category 5 of the Protocol)
HESA SNC	2 / EU private sector	French owner of a tuna longliner with a fishing licence in Mauritania (category 5 of the Protocol)
Pelagic Freezer Trawler Association	2 / EU private sector	Organisation representing Dutch pelagic trawler owners (category 6 of the Protocol)

Source: prepared by the mission and the Poseidon team

3.3 Interventions by Technical and Financial Partners (TFPs)

3.3.1 Summary of interventions

Table 8 below presents the recent, ongoing and planned interventions of the different TFPs (i.e. donors) involved in the fisheries sector in Mauritania.

Table 8: Interventions by TFPs in Mauritania

Funding Agency	World Bank		KfW			
Project title	PRAO project	Fisheries Eco-pole project (within the ZFN)	Modernisation of the EPBR	Fisheries Monitoring Project - Phase V	Sustainable management of fish resources	Promotion of value chains and employment in Mauritania's fishery sector
Situation (*) and remarks	closed	closed	in progress	in progress	Financing contract signed, starting soon	Financing contract signed, starting soon
Budget	19 million USD	15.8 million USD	EUR 15.6 million (of which KfW 13 million and RIM 2.6 million)	EUR 30,1 million (KfW part)	Budget EUR 18.5 million (KfW part)	EUR 19 million (KfW part)
Period/Remarks	Started in 2015, completed in Feb. 2022	Started in 2016, completed early 2022. Many delays on all components	Started in 2019, many delays, expected to be completed by end of 2027	Project started in 2016, expected completion date end 2024		Expected to start in Q3 2022; duration 5 years (2022-2026)
Themes areas of action	<ul style="list-style-type: none"> - Improvement of fisheries governance, including institutional reforms, transparency (support to the FiTI initiative), capacity building), with a focus on governance of the octopus fishery - Rehabilitation of the MPN 	<ul style="list-style-type: none"> - Construction/equipment of a pumping station for small pelagic fish at PAN - Construction/equipment of a refrigerated warehouse at NDB airport - Strengthening the business climate - Entrepreneurial training 	<ul style="list-style-type: none"> - Computerised auction hall (3,200 m²) for small pelagics and multifunctional - Development of PC quays (opposite the auction) - Miscellaneous (680 warehouses, 7 km of roads, sanitation, sanitary facilities (12) - Training for the management of the auction - Management plan for the whole EPBR 	<ul style="list-style-type: none"> Capacity building for the GCM - Service wharf at NDB, coastal radars, equipment, etc. 	<ul style="list-style-type: none"> •Construction of the 'Blue Towers Operational and Scientific Complex' (OSC) at NDB, including new headquarters for GCM and IMROP; •Strengthening IMROP's research capacity 	<ul style="list-style-type: none"> •Value chain financing (3 commercial banks) ; •Challenge-fund mechanism (training and quality standards)

Funding / Implementing Agency	EU/GIZ	EU/GIZ	EU/ILO	EU/AECID	AECID	JICA		
Project title	Promopêche EU-Co-Financing to GIZ	Sustainable artisanal Fishery in Mauritania/ Promopêche Programme	Promopêche - ILO	Promopêche - AECID	Support to SNDP	Capacity building of ONISPA	Capacity building of the CQFMP	Capacity building of IMROP
Situation (*) and remarks	GIZ component completed (components with ILO and AECID to continue)	in progress	in progress	in progress	in progress	in progress (50% executed)	underway (financing agreement signed); bid in launch phase	in progress
Budget	EUR 2 million (through EU Emergency Trust Fund for Africa)	EUR 7.1 million	EUR 14 million	EUR 7.7 million	(not known)	EUR 13 million	Approx. EUR 15 million (1.9 billion Yen)	indicative budget ~ EUR 40 million
Period/ Remarks	Project started in 2018, GIZ related component completed in Sept. 2022	Project started in 2018, originally planned to end in Sept. 2022, extended till 06/2024	Project started in 2018, expected completion January 2024	Project started in 2019, expected completion April 2023	first phase between 2016 and 2018 (USD 5.5 million). Closing date not known	Agreement Feb. 2019, expected delivery April 2023	Agreement March 2022, delivery in 2024	Bid in progress (2023), delivery expected in 2025
Themes / areas of action	Upgrading of the MPN, management plan for small pelagics, experimentation on post-harvest losses of PA pelagic catches and on pelagic products for school canteens		<ul style="list-style-type: none"> • Construction and operation of the PDAs at M'Heijratt and KP 93 including economic viability and management arrangements; • Conducting training courses ; • Capacity building CQFMP-NDB) ; 	<ul style="list-style-type: none"> • Construction and operation of the training canning facility (ISSM) ; • Construction of a teaching pool (CQFMP-NDB) ; • Conducting training courses ; • Distribution of safety equipment 	Fish distribution via SNDP (social support and food security)	Renovation of the ONISPA laboratory (NDB)	Construction of the CQFMP-NKT headquarters	Acquisition of a research vessel (to replace the ANWAM acquired in 1997). The ANWAM was recently sunk at the GCM dock.

		<ul style="list-style-type: none"> • Pilot experiments in PA value chains 	<ul style="list-style-type: none"> • at sea for the PA; • Experimentation with new fishing gear for the PA 				
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Funding Agency	GIZ	EU	FADES	Chinese cooperation
<i>Project title</i>	Promotion of employment and occupational integration in rural areas	Blue economy (with emphasis on marine fisheries)	Improvement of the Port of Tanit	
<i>Situation (*) and remarks</i>	Ongoing programming - focus on rural areas, not specifically fish	Ongoing programming	Ongoing programming	
<i>Budget</i>	EUR 7.5 million	?	(funding not yet in place)	
<i>Period/ Remarks</i>	Ongoing project extended until Sept 2023; follow-up project planned, implementation period: Sept. 2023 - Sept. 2024	(start-up foreseen early 2024?)	2023-2024	
<i>Themes / areas of action</i>	?	Focus on artisanal pelagic fisheries in central and southern areas (PK93, MPN and M'Heijratt), TA envisaged?	No Objection obtained for processing plant, fish market, water and electricity network, tugs	

Remarks :

- AFD / Support to EETFP Nouadhibou in the fisheries sector (equipment, TA EUR 1.3 million; initial period envisaged 2020-2024; project not started yet.

- The bilateral financial cooperation through KfW supported the capitalisation of the Banc d'Arguin, and Coastal and Marine Biodiversity (BACoMaB) Trust Fund Ltd. with EUR 15.2 million and provided 600.000 EUR for its institutional support. On behalf of the German government KfW financed in 2021 an organisational audit of BACoMaB and will soon commit EUR 2 million for accompanying actions to further strengthen the institution.

Source: prepared by the mission, based on information from MPEM, EUD, KfW and GIZ

In the fisheries sector, the World Bank, Germany (through the German public investment bank KfW) and JICA are, together with the EU, the main development partners of Mauritania. These partners cover a wide range of interventions, with the main entities linked to fisheries in Mauritania and according to the 8 priority areas of intervention as defined in the current Protocol.

The World Bank intervened until recently in the framework of i) the national activities of the Regional Programme for West Africa (PRAO) and ii) a project to improve the business climate in the fisheries products development sector implemented with the Nouadhibou Free Zone Authority (AZFN). **It appears that it does not have any fisheries projects currently under appraisal for Mauritania.**

KfW is historically active in the sector in Mauritania: it has been strengthening the means and capacities in terms of fisheries surveillance since the early 1990s. It currently has **4 projects underway** or about to start, for an estimated total amount of EUR **55.5 million**: i) the Fisheries Surveillance project 'Capacity Building of the GCM - Phase V', ii) the EPBR Modernisation project, iii) the Capacity Building of the GCM and IMROP project and iv) the 'Promotion of Small Pelagic Value Chains for Human Consumption' project.

The EU (with the German SEWOH fund) is financing the **Promopêche** project for an amount of approximately EUR 27.2 million, which is nearing completion. It is worth recalling its financial contribution and the sectoral support made available to the IRM under successive SFPAs (see Chapter 2.2.2).

JICA has **three ongoing** projects, for a total amount of about EUR **68 million**: i) capacity building of ONISPA, ii) capacity building of the GCM and iii) capacity building of IMROP.

Also noteworthy is the support of **Spain** for the establishment and operation of the SNDP, and the ongoing programming for projects financed by **GIZ** (training and employment in fisheries), **FADES** (improvement of the Port of Tanit) and **the EU** (blue economy project).

3.3.2 The PK 93 Project

Further development of the PDA 'PK 93', initiated under the ILO component of the Promopêche programme, is expected to materialise in 2024. It includes land-based economic infrastructure as well as a health post and a school. This PDA will be equipped with a marine structure whose work will begin in January 2024. A 6 million Euros budget from the Sectoral Support 2021-2026 has already been allocated to this project, and an additional co-funding of 4 million Euros is expected from the 'Blue Economy Project' which is currently being prepared by the EUD.

3.3.3 The KfW project 'Promotion of value chains and employment in Mauritania's fishery sector'

The implementation of this 19 million euro Project, financed by KfW is expected to start by mid-2023, and run over a period of 5 years.

It aims at being a catalyst and accelerator in the transition process of 'less small pelagics channeled to fishmeal, more fish for human consumption' by acting on vocational training and access to finance. In terms of training, the measures foreseen by the project are mainly aimed at delivering training tailored to the needs of enterprises and improving the employability and integration of trainees within enterprises. These measures will help stimulate innovation through the setting-up of a 'challenge-fund' mechanism. In terms of financing, the measures foreseen by the project aim at promoting financial instruments through three local commercial banks.

The microfinance structure Djikké, with its experience in terms of partnership with the ILO/PromoPêche and collaboration with the FNPA, could be the reference microfinance structure involved in the project.

It can be expected that the job creation resulting from the development of the pelagic value chain will be particularly visible at factories level (especially for women), fish trading activities, service providers and fishing activities.

4. Policy and legislative environment

A key requirement of SFPAs and their associated Protocols is that the access component is coherent with national policies and strategies in the PTC. Ex ante evaluations concluded prior to a negotiating mandate being given to the European Commission assess such coherence. In addition, sectoral support funding must be used in such a manner to be coherent with, and indeed to support, the implementation of national policy.

The principles of sustainable development of the fisheries sector in Mauritania, as set out in the fisheries resources management strategy, are defined in Law N°017-2015 of 29 July 2015 on the Fisheries Code and its implementing Decree N°2015-159 of 1 October 2015.

Specific mention is made below of recent developments in the sectoral policy and legal framework of the sector, namely i) the Marine Fisheries Strategy 2020-2024 and ii) the Policy and Planning Letter 2022-2024 (L2P 2022-2024), insofar as they condition in particular the activities of the EU vessel fleets and the use of the funds of the current Protocol's Sectoral Support. The Small Pelagics Management Plan is recalled for the record, as it was presented in paragraph 2.2.1.

4.1 Marine Fisheries Strategy 2020 - 2024

A specific strategy for maritime fisheries, the 'Strategy for the Sustainable and Integrated Development of Maritime Fisheries 2020-2024' (hereafter referred to as the Sector Strategy 2020-2024) has been in force since July 2020, for a period of five years. This follows the 'National Strategy for Responsible Management for Sustainable Development of Fisheries and the Maritime Economy for the period 2015-2019', which was evaluated in 2019.³⁷

This has led to the need to broaden the scope of the Strategy 2020-2024 from maritime fisheries to other areas of the MPEM's competence, namely maritime affairs and inland fisheries and fish farming.

The need for reforms and adjustments to overcome certain shortcomings in the current management of maritime fisheries, with reference to access to resources and exploitation, has also emerged in order to strengthen the sustainable nature of the exploitation of fisheries resources and increase the contribution of the maritime fisheries value chains to the country's economic and human development.

4.2 Policy and Planning Letter 2022-2024

The Mauritanian Government has therefore decided to **provide the country with a Policy and Planning Letter (L2P) for the fisheries and maritime economy sector for the period 2022-2024** (called L2P 2022-2024), which better responds to the challenges and needs of the sector in all its components, while building on the achievements, initial lessons and orientations of the Sector Strategy 2020-2024. The sectoral objectives of this L2P are in line with the long-term strategic vision of the sector, which is itself in line with the Strategy for Accelerated Growth and Shared Prosperity (SCAPP - 2016-2030) and the Pan-African Fisheries and Aquaculture Reform Policy Framework and Strategy.

The main expectations of the reforms and adjustments to be taken into account in the framework of the L2P 2022-2024 are the following:

- Strengthen **research** capacity in the areas of resource assessment, innovative technical research and the management of exploratory fisheries;

³⁷ Poseidon and Maurifish (2019) Mid-term evaluation of the implementation of the national strategy for responsible management for a sustainable development of the fisheries sector and the maritime economy 2015-2019 - final report. 135 pages.

- Adjust the mechanisms for allocating and monitoring concessions of the right of use (**quota**) in order to limit speculation on the use of these quotas, to ensure a better match between quotas and fishing capacity, and to refine the definition of quotas within each major category of resources;
- Increase the effectiveness of the **monitoring, control and surveillance of fisheries** in all waters under Mauritanian jurisdiction and on land;
- Review the **national exploitation regime in order to** ensure a better domiciliation of the wealth created and to promote the development of a national fishing fleet;
- Accelerate the implementation of the accompanying measures allowing an optimal exploitation of the **new port infrastructures with the** aim of decongesting the saturated northern zone towards the central (Tanit) and southern (NDiago) zones;
- Strengthen the supporting role of the **merchant navy** in all its prerogatives for a sustainable and responsible development of the fisheries sector and the maritime economy;
- Strengthen the contribution of **inland fisheries and fish farming** to local development in areas with vulnerable populations in the interior of the country.

The implementation of these orientations requires the revision of the legislative and regulatory framework as well as the reorganisation of structures, reforms that will be carried out in the framework of the implementation of the L2P 2022-2024.

In addition, the preparation of an Investment Framework and a Medium Term Expenditure Framework (MTEF) to facilitate the implementation and strategic steering of the L2P is underway.

The use of the Sectoral Support funds of the current Protocol must naturally be in line with the application of this L2P.

5. How to increase benefits from EU fleet activities in Mauritania in terms of fish landings and employment: Findings

5.1 Food security, integration of small-scale fisheries and gender aspect

5.1.1 Main characteristics of the fisheries sector: main value chains and food security in the country and in the region³⁸

Mauritania has considerable fishing potential due to the combination of favourable oceanographic conditions, a wide continental shelf along about 750 km of coastline and an Exclusive Economic Zone (EEZ) of about 205 000 km². Mauritania's fishing potential is around 1.8 million tonnes per year, all species combined, including about 100 000 tonnes of demersal fish, 7 500 tonnes of crustaceans (mainly shrimps), 50 000 tonnes of cephalopods (mainly octopus), between 1.3 and 1.4 million tonnes of small pelagics (horse mackerel, sardinella, sardines, ethmalose, mackerel, etc.) and 25 000 tonnes of tuna. The current catch level in the EEZ is between 1.3 million tonnes (2019) and 1.5 million tonnes (2018) per year, 80 % of which is small pelagics. Overall, demersal resources are mostly fully or overexploited; octopus and pink lobster are particularly overexploited. Stock assessments of small pelagics show that black horse mackerel, round sardinella and ethmalose are in a state of overexploitation and mackerel is fully exploited. On the other hand, sardines are underexploited.³⁹

There are three main fishing segments: artisanal fisheries (AF), coastal fisheries (CF) and high seas fisheries (HF); the AF and CF include undecked and decked vessels, using ice or not, targeting cephalopods, demersal fish or small pelagics. The HF consists mainly of cephalopods, shrimps and fish trawlers, either freezers or using ice, and deep-sea pelagic freezer vessels.

The main three value chains are demersal fish, cephalopods and small pelagics. Demersal fishing is carried out by artisanal, coastal and industrial vessels and is essentially geared at export outside Africa (of high value products). Cephalopods fishing is carried out by artisanal and coastal fisheries (industrial fishing by foreign vessels, namely from the EU, has been banned as a way to protect the national fleet) and, like demersal fishing, is essentially geared at export outside Africa (of high value products). Generally, demersal fish and cephalopods exported products are either i) fresh products landed in Mauritania and exported to EU markets by road (via Morocco) or by air (see Illustrations in Annex 3), (ii) products frozen on board landed in Nouadhibou and exported by containers, mainly to Europe and Asia, or iii) fresh products unloaded in Mauritania, frozen and packaged in processing plants then exported by containers, mainly to Europe and Asia.

Small pelagic fishing is carried out by the artisanal fleet ('Senegalese'-type canoes) and coastal vessels, as well as by large foreign industrial vessels (trawlers and Turkish purse seiners) (see illustrations in Mission Report 1 and in Annex 3 of the present report). Except for the industrial trawlers who freeze on board and export to regional African countries and Eastern Europe, the catches of small pelagics are unloaded fresh and are largely destined for fishmeal plants in the country (which have developed considerably over the past 15 years, particularly in Nouadhibou) and to a lesser degree, fish processing (mainly freezing

³⁸ This section is largely based on the document 'GOPA/COFAD. Rapport d'étude exploratoire pour KfW – Mauritanie - Études préparatoires pour le projet de promotion des chaînes de valeur et de l'emploi dans le secteur des pêches. Mars 2021' as well as inputs from the national consultant of the study and the source cited hereafter.

³⁹ Source: '10^{ème} édition du groupe de travail scientifique de l'IMROP', Feb. 2023

and packaging, for sale in the region and Eastern Europe); smaller quantities go to the local market. A newly built cannery in Nouadhibou has recently started operating and processes sardine which is not widely consumed fresh or frozen in local markets, but which is subject to strong demand when canned (see Illustrations in Annex 3). This processing facility provides for national value addition, income generation, women employment (80% of the production staff is female), food security (easy distribution and storage of products in the whole country) and substitution of imported products (mainly from neighboring Morocco).⁴⁰ Provided this type of industry proves viable in Mauritania it may open up larger opportunities, considering the important potential of the sardine stock in the region.

The main and recurrent issue faced by fisheries policy makers is to increase the quantities of small pelagics destined for human consumption and simultaneously, reduce those which go to the fishmeal industry, while preserving the stocks (see section 5.1.2 below).

Products intended for the **national market** consist mainly of fresh small pelagics from vessels operating under national regime (mainly AF and CF canoes) and frozen products from transshipment by deep-sea fishing fleets operating under foreign regime (fee in kind of 2% of total catches). The availability of fish for the domestic market was around 50 000 t per year in 2018, including nearly 40 000 t of fresh fishery products and about 10 000 t of frozen products.⁴¹ Note that the 'Société Nationale de Distribution de Poisson' (SNDP), has created a distribution network in the whole country over the past ten years, to make frozen small pelagics accessible to the poorest of the national population (see illustrations in Annex 3).

Products destined for **regional African markets**, mainly small pelagics, include (i) fresh products transported by road, in particular to Mali, (ii) whole or slightly processed frozen products (head-off, gutted), by sea freight and (iii) artisanal products traditionally processed by salting-drying or drying and transported by truck to neighbouring region, e.g. Mali, Nigeria, etc. (see Illustration in Annex 3).

Overall, there are currently **more than 150 seafood processing plants** (mostly Small and Medium Enterprises), almost a third of which are fishmeal plants. On an annual average for the period 2013-2018 (excluding fishmeal), African markets accounted for 56 % of total catches in volume, followed by the EU (17 %), Russia (15 %) and Asia (12 %). Over the same period, EU markets accounted for an annual average of 40 % of the total value (mainly cephalopods and frozen demersal fish), followed by Asia with 28 % (mainly frozen cephalopods), Africa with 22 % (mainly frozen demersal and pelagic fish) and Russia with 10 %.⁴²

5.1.2 Food security vs. fishmeal and fish oil industry

The existing fishmeal and fish oil industry absorbs the bulk of small pelagic landings (about 450 000 t/year, or almost 80 % of the total landings of pelagics). Developing this industry was promoted from the second half of the 2000s onwards as a way to implement the policy of increasing fish landings in Mauritania (see illustrations in Annex 2). The products of this industry are mainly intended for animal consumption (aquaculture) and are exclusively exported. The main markets are in Asia (China and Vietnam), the EU, Russia and Ukraine; Turkey has also become a major destination in recent years.⁴³ In 2019, out of a total of around 100 000 t exported (worth around 100 million euros), the Asian market absorbed almost 60 % of the total.

⁴⁰ The selling price of one can is 200 RUM (around 0.5 USD equivalent), which is quite competitive as regards the imported products.

⁴¹ IMROP 2019 Working Group

⁴² Source : Poseidon et Maurifish (2019) Evaluation à mi-parcours de la mise en œuvre de la stratégie nationale de gestion responsable pour un développement durable du secteur des pêches et de l'économie maritime 2015-2019 – rapport final. 135 pages

⁴³ Source: Djiga Thiao and Stuart W. Bunting. Socio-economic and biological impacts of the fish-based feed industry for sub-saharan Africa. FAO Fisheries and Aquaculture Circular No. 1236, 2022

The level of exports in volume through the SMCP rose over the period 2018 - 2021 to 298 120 tonnes (including 143 860 t of fishmeal and oil), representing between 550 000 and 600 000 tonnes/year in fresh weight equivalent, or about 70% of total landed catches. In terms of value, exports via the SMCP represented an average of USD 635 million per year over the period 2018 - 2021. Over the same period, the contribution of the main products was as follows: fishmeal and fish oil (48.3 % in volume and 28.2 % in value), frozen pelagics (24.1 % in volume and 7.5 % in value), frozen cephalopods (13.4 % by volume and 58.4 % by value), and others - demersals and crustaceans, excluding molluscs (14.2 % by volume and 7.9 % by value). Over the period 2018 - 2021, we can note in particular an increasing trend in the share of frozen pelagics in exports through the SMCP channel.⁴⁴

The fishmeal and fish oil industry goes against the increased integration of the sector into the national economy (in terms of wealth creation and domiciliation, and job creation), sustainable resource management and food and nutrition security in Mauritania and West Africa. The issue of 'more pelagics for human consumption and less pelagics for fishmeal' is a strong element of the Sectoral Strategy, which plans to reduce the quantity of pelagics for fishmeal by 80 % by 2024. It is clear that small pelagic products offer proteins of animal origin that are inexpensive and recognised for their nutritional richness and are therefore crucial in terms of food security.

Several circulars on the regulation of fishmeal industry have been adopted by the MPEM since 2016. Factories are thus in the process of making their transition towards the development of product lines other than fishmeal, which represents a strong development potential in view of the very important commercial opportunities for frozen small pelagics on the African and Eastern European markets (markets in high demand and lucrative).⁴⁵

Fishmeal remains the most profitable market for small pelagics: this industry has no requirements in terms of fish quality, and therefore does not need RSW vessels, adequate means of landing and transport; the installations are not expensive and do not require a lot of manpower; the market is very strong.

In practice, the application of this policy has encountered difficulties in particular due to the reluctance of the fishmeal industry to implement the measures taken by the MPEM, the quality of the products landed, and the current freezing and storage capacities of the factories. In particular, the measures taken in 2016 to stop fishmeal factory concessions and the gradual reduction of fishmeal quotas have not been implemented; the measure taken in 2019 requiring purse seiners to land 20% of their catches on the local market for human consumption has not been respected; in 2021, a decree provided in particular for the prohibition of the use of horse mackerel, mackerel, yellow mullet and round sardinella for fishmeal production (these species must be frozen for human consumption), and the obligation to use only products unfit for human consumption. These measures have not been fully complied with and are still subject to adjustments by the MPEM.⁴⁶

However, a new generation of fishing vessels is emerging that meets the country's social ("mauritization" of crews) and economic (landing of quality products) requirements. The quality of storage and conservation on board catches of CF/HF vessels is clearly improving (vessels equipped with Refrigerated Sea Water (RSW) imported from Northern Europe and Turkish seiners storing their catches in iced seawater). The quality of the catches of most of these vessels is already sufficient to meet safety standards for national human consumption and export.

⁴⁴ Source : Bulletin SMCP

⁴⁵ The main ECOWAS fish importing countries import about 1.8 million t/year, including about 345 000 tonnes caught in the Mauritanian EEZ. According to projections, imports will amount to 2 million tonnes in 2025, which represents nearly 60 000 t of additional potential market for Mauritania. Central Africa is another important region for Mauritanian pelagic exports as well as Eastern European markets, including Ukraine and Russia (source: GOPA/COFAD 2021 study).

⁴⁶ Source: note from the MPEM (not dated)

It should be noted that the 'more fish for human consumption' option is based more on an increase in exports to regional markets than on an increase in domestic consumption. Indeed, an increase in fish consumption of 2.4 kg/year per capita over 5 years (indicator of the Sectoral Strategy 2020-2024), i.e. an increase of 19 % compared to the current level of consumption, would correspond to an increase of 10 500 t of products for the national market. This tonnage is well below the objective of a 50 % reduction in the quantity of pelagics intended for fishmeal, which would correspond to an increase of about 260 000 t of pelagics intended for human consumption. Note that a study on the SNDP has recently been carried out;⁴⁷ the SNDP is presently distributing ca. 8 000 tons per year. Even though it is widening its distribution network via the opening of new distribution points, it is unlikely that the SNDP will be able to double its capacity in the short- to medium-term. On the other hand, the private sector is establishing retail fish outlets which are likely to absorb increasing quantities of fresh and frozen fish for sale on the local markets.

L2P 2022-2024 includes a Strategic Axis 2 "Value chains in the fisheries sector", which includes in particular the Structuring Lines (SLs) 2.9 to 2.11. SL 2.9 "Improvement of support services for the development of value chains" including a "Research and Development" component on industrial processing methods of fishery products focusing on alternatives to the production of fishmeal for animal feed (e.g. processed frozen products, semi-preserves, preserves). SL 2.10 "Improvement of the business climate" includes the "Investment attractiveness and product competitiveness" component and refers in particular to the improvement of the tax environment and a set of incentives, ensuring the stability of the legal and fiscal framework; and the "Facilitating Access to Finance" component. Finally, in the context of SL 2.11 "Improving marketing and of the distribution of fishery products", actions are planned to improve the competitiveness and structuring of the value chains for fishery products intended for human consumption, with particular emphasis on pelagics, whether destined for national, subregional or international markets.

According to L2P, all actions to accelerate the transition to 'less fishmeal and more pelagic products for human consumption' were to be specified and organised as part of a specific plan defined at the beginning of the implementation of this L2P. This plan must also include a quantified analysis of the economic and social issues associated with this transition. Other targeted actions aimed at improving the food and nutritional security of the Mauritanian population must focus more specifically on increasing the storage and distribution capacity of fish at prices subsidized by the SNDP and also on the promotion of new products based on small pelagics for the most vulnerable populations, on the implementation of awareness-raising campaigns on fish consumption, and on the adoption of measures to encourage the marketing of new products for the national market but also for the subregion. This Plan has not yet been developed by the MPEM.

As indicated in section 3.3.3, the project "Promotion of value chains and employment in Mauritania's fishery sector" funded by KfW will be particularly involved in these various aspects.

5.1.3 Gender aspects

Women's jobs are almost exclusively in i) fish processing, whether in artisanal processing units or factories (the production lines of elaborate products are mainly occupied by female labor), and ii) fish distribution ('micro-mareyeuses' involved in fish retail trading). Despite all the efforts made to integrate Mauritanian women into the socio-economic framework of the fisheries sector, they face a range of challenges such as illiteracy, lack of infrastructure, lack

⁴⁷ Dr. Moustapha KEBE & Dr. Mohamed Lemine NAFFA. Étude du programme de renforcement de la pérennité de la Société Nationale de Distribution du Poisson (SNDP) et de sa contribution à la sécurité alimentaire en période d'urgence. Rapport final, mars 2023

of control over the means of production, the effects of climate change on the resource, lack of financial support and insufficient training.

Specific activities geared at women have been developed by the NGO Mauritanie 2000 (see section 3.2.3 above), then under the WARFP project (distribution of 70 ice boxes as a grant and training on hygiene, delivered by ONISPA staff, for women fishmongers, grouped in an association in the Nouakchott Fish Market). More recently, Promopêche has delivered training on hygiene and good practices in fish handling to numerous groups of women. The KfW project mentioned in section 3.3.3 above will be particularly instrumental in promoting this target group. Note that Women Savings and Credit Groups are being promoted by the State Secretariat for Woman's Condition.

5.2 Port infrastructure and services

5.2.1 General situation

Main infrastructures

There are currently four fisheries-related ports in Mauritania: in Nouadhibou, the Port Autonome de Nouadhibou (PAN) and the Etablissement Portuaire de la Baie du Repos (EPBR), the Port of Tanit (80 km north of NKT) and the Port of Ndiago on the southern border of the country, as well as a major landing site in Nouakchott (the Marché au Poisson de Nouakchott (MPN)). These five port infrastructures are managed by public industrial establishments (EPIC).

Deep-sea fishing vessels can be accommodated at the PAN and the Port of Ndiago, while the EPBR, the Port of Tanit and the MPN are landing sites dedicated to artisanal and coastal fishing. The PAN and the EPBR, and the adjacent industrial zones, concentrate most of the activities of the fisheries sector in Mauritania (services to vessels, services to seafarers, product landings, product valorisation). The management of the PAN and the EPBR was entrusted to the Nouadhibou Free Zone Authority (AZFN) in 2013 and is therefore no longer under the responsibility of the MPEM.

Apart from these five infrastructures, there are numerous landing sites for pirogue fishing spread along the coastline, Improved Landing Points (PDA) (12 PDAs in the central and southern zones) and Integrated Development Poles (PDI).

Significant efforts have been made in recent years to extend the capacity and modernise the fishing port infrastructure, particularly with the support of TFPs. Despite all these efforts, the reception capacities are saturated and the general environment of the ports (hygiene, sanitation, water, energy, port services) still constitutes a serious constraint to the promotion of value chains that are more creative of employment and wealth for the country.

Creation of the National Fishing Ports Office (ONPP)

In order to respond to the problems and challenges faced by the port infrastructure, it was decided to create a National Fishing Ports Office (ONPP) competent for all the current areas of fishing port infrastructure (fishing ports, PDAs and PDIs) and under the supervision of the MPEM, which should strengthen the MPEM's steering capacities in terms of planning and management of port infrastructure. In Nouadhibou, the PAN and the EPBR should therefore return to the MPEM. **This Office has not yet been created formally and its implementation has not materialised yet.**

5.2.2 The PAN

Description

The PAN, until 2013 was under the supervision of the MPEM and as such benefited from the SFPAs EU/IRM Sector Support (notably construction of its headquarters, acquisition of a VTS system (still in progress), studies (for the rehabilitation of the commercial wharf, for the removal of wrecks from the Bay), but has since been under the supervision of the Nouadhibou Free Zone Authority. When it comes back under the supervision of the MPEM in

the framework of the creation of the ONPP, **it will again be a potential beneficiary of the Sector Support, in the framework of the current Protocol.**

The PAN has the following port infrastructure:

- A 600 m fishing wharf with a 6 m draft; this is where the following fishing vessels unload their catches: 1) freezer and fresh fishing vessels operating under the EU/RIM SFPA, 2) pelagic purse seiners supplying (by pumping) directly the Cap Blanc Pélagique company located on the quay, 3) purse seiners using the pumps of the PAN to unload their catches onto trucks that will transport them to factories outside the Port and 4) national offshore and coastal vessels;
- A 120 m long commercial quay. This quay is currently being repaired (over 3 years) and should have a draft of 10 m; it will be used mainly for fishing vessels and deep-draft container ships. The works, financed to approximately EUR 18.3 million for the works and EUR 1.5 million for the supervision, should be completed by 2024.
- An extension, with a total surface area of 120,000 m² and with 660 m of quayside, with a draft of 6.70 m. This extension is financed by the Spanish Cooperation for about EUR 19.8 million; its construction should be completed in 2024; it also provides for the supply of water and electricity, but not the construction of sanitary facilities.
- It should be noted that transshipments from freezer fishing vessels to refrigerated cargo vessels take place in the Nouadhibou Bay, mainly for pelagic freezer trawlers of the 'Russian' type, either from the EU (from Latvia, Lithuania, Poland, Ukraine and Germany) or operating under a free licence (from Russia in particular).

The PAN has no MARPOL-compliant facilities/receptacles (see paragraph 5.2.3) and seems to have no prospects in that respect. In addition to the completion of ongoing works, the PAN management reports the following needs: i) a sewage treatment plant (indeed, PAN has never been equipped with such a facility so far)⁴⁸ and ii) capacity building of staff.

Unloading operations are carried out by 7 handling companies, grouped together in an association, the "Bureau d'Embauche de Main d'œuvre Portuaire" (BEMOP), which employs professional (187 people in total) and occasional (800 people in total) dockers.^{49 50}

It should be noted that the L2P 2022-2024 generally mentions a lack of coherence and transparency in the planning of fishing ports and, in particular, that there are 13 private fishing ports/wharves in the PAN, 12 of which were built by filling in the sea, which leads to the silting up of the access channel, the increase in the risk of illegal trade, the non-respect of safety and security rules etc.

Illustrations relating to Nouadhibou

Annex 2 presents illustrations of the PAN, other infrastructure and facilities in Nouadhibou, various types of fishing vessels in Nouadhibou and the transshipment of a foreign non-EU/Russian pelagic trawler in Nouadhibou.

Waste Management

MARPOL Convention - Operational pollution from illegal discharges remains the main source of pollution of the marine environment from ships: degassing (discharge of waste oil) which takes place at sea and solid waste discharged overboard.

⁴⁸ It seems that there is a project for a wastewater treatment plant, under the authority of the AZFN, to which the various industries in the area would be connected.

⁴⁹ The manager of this office indicates that fishing vessels do not call on dockers during transshipment; it is their own crews that carry out the operation (in the case of the Russian trawler whose transshipment was observed during the mission, the crew receives from its owner a bonus of US\$15 per tonne transhipped).

⁵⁰ As an indication, the landing of the cargo of a Dutch pelagic freezer trawler, i.e. about 4,000 t at the end of a fishing trip of 1 to 1.5 months, requires 100 professional dockers and 100 casual dockers for 3 days.



However, as part of the implementation of the International Convention for the Prevention of Pollution from Ships (MARPOL 73) adopted under the aegis of the International Maritime Organisation (IMO), States Parties are urged to provide receptacles in ports for ships to discharge sewage (Annex IV)⁵¹ and solid wastes (Annex V) while in port.

A waste reception station is a facility where bilge water, sewage, sludge, waste oil and waste from ships that have arrived in port for loading/unloading are received and separated into different containers in accordance with the Ship Waste Collection and Control Regulations (see the illustrations in Figure 3 below).

Figure 3: MARPOL compliant receptacles



Situation at the PAN - It should be pointed out that the PAN has no reception station with such a purpose, which would abide by the provisions of MARPOL;⁵² solid waste is hardly collected (see below). The environmental department at PAN has a small truck and a MARPOL tank for waste water. It is therefore clear that **fishing vessels operating in the Mauritanian EEZ tend to dispose of their waste at sea** (unless they have planned an upcoming port of call with such facilities). The GCM does have the prerogative to check that vessels have not discharged waste at sea (it should theoretically apply a sanction to any vessel that does not land waste), but its means of effective action are limited by the absence of the necessary port conditions. However, the GCM indicates that there are currently 4 NGOs operating to remedy this situation by recovering the waste, as some of it has commercial value.⁵³

For example, the Mauritanian NGO 'Cri Juvéniles Marin' has set up a system for collecting waste oil and solid waste from foreign vessels that dock at the PAN fishing wharf to unload their catches (see Figure 4 below). The figures provided by the CMG are as follows for 2020, for all 4 NGOs: 211,860 litres of oil, 5,823 filters and 5,477 bags of waste.

⁵¹ For fishing vessels, the water in the engine room is mixed with oil because that is where it is emptied. This oil mixes with the cleaning water from the engine room and with the leaked water. Annex IV corresponds to this water.

⁵² The same is true in Nouakchott.

⁵³ There is a Spanish company in Nouadhibou that recovers SNIM's used oils (from the operations of its trains and machinery) and exports them. In addition, the local fish meal plants use the used oils in a mixture to produce steam.

Taking the ‘waste’ issue into consideration - This environmental issue does not only concern EU vessels using the Mauritanian fishing zone and the PAN, but all fishing vessels, both foreign and national, in the artisanal, coastal and offshore fishing sectors, i.e. a considerable number of vessels.

Figure 4: Recovery of waste oil and solid waste from a Spanish freezer shrimp vessel at the PAN fishing quay by the NGO ‘Cri Juvéniles Marin’ (24/11/2022)



For information purposes, the following is an estimate of the quantities of waste oil produced per year in Mauritania by coastal and offshore fishing vessels:

- Number of vessels working at the same time along the Mauritanian coast: 500 on average, for 8 to 10 months;
- For a 500 to 700 HP vessel, the oil consumption is 300 litres every 15 days;
- In total: 300 litres x 8 months x twice a month x 500 vessels = 2.4 million litres, or about **2,000 tonnes of waste oil per year**.

Taking into account the commercial vessels, bulk carriers and container ships that ply the corridor along the Mauritanian coast, this quantity of oil, which is essentially discharged into the sea and therefore washes up on the coast, **would be much higher**.

This issue of waste produced by fishing vessels is the subject of a special mention in the L2P: indeed, its Structuring Task 1.6 'Protection and conservation of the marine and coastal environment' stipulates that 'the third area of action of this Structuring Task will focus specifically on the strict application of the regulations and provisions of the MARPOL conventions to prevent all forms of dumping at sea. This will include measures to bring ports up to standard, through the installation of receptacles for the reception, storage and treatment of waste (used oil, waste water and solid waste), according to financing and management arrangements that will also have to be specified (e.g. partnership management system with the private sector, cost recovery system, etc.)'.

It seems, however, that **this field of action is currently not taken into account as such either by the Mauritanian authorities or by the TFPs** (GIZ and Spanish Cooperation in particular).

The creation of the National Fishing Ports Office, placed under the supervision of the MPEM, should make it possible to give the desired attention to this issue.

5.3 Landings by EU fishing vessels into Mauritania

5.3.1 Fee in kind landings from EU vessels and SNDP

As mentioned in section 2.1.2 above, only EU vessels in **category 1** (freezer shrimp vessels) and **category 6** (pelagic freezer trawlers) are subject to the fee in-kind under this Protocol as under the previous one, and must land 2% of the total by-catch (for category 1) and 2% of the total catch (for category 6).

Vessels fulfil this obligation at the end of each trip (except the last one) by unloading the corresponding products at the PAN or by transshipping in the bay, and handing them over to the SNDP's National Supply Department in Nouadhibou. The latter then stores the frozen products received in its own cold storage facility (currently with a capacity of 450 t; a second adjacent warehouse of 1,000 t is being built with its own funds) or, if there is no space, in one or other of the local private companies' cold storage facilities.

It should be noted that the fee in-kind from Turkish seiners (2% of total catches) that land fresh products is frozen at the expense of the corresponding shipowner before being handed over to the SNDP. The head office in Nouakchott (which has an additional warehouse with a capacity of 250 tonnes) schedules deliveries to the various distribution centres in the country (currently 32, which deliver to around 400 sales outlets)⁵⁴ and manages the fleet of refrigerated trucks (including 14 40-t trucks) that supply them mainly from Nouadhibou.

The SNDP was created in 2013 with Spanish funding,⁵⁵ with the aim of promoting fish consumption and contributing to the food and nutritional security of the most disadvantaged Mauritanian populations, by making frozen fish available to them at a highly subsidised price. The selling price is 5 RUM per kilo⁵⁶ (i.e. around EUR 0.15), the quantity being limited to 2 kilos per person per day.⁵⁷

When the catches of the EU pelagic fleets reached 100,000 tonnes per year, these fleets supplied the SNDP, and therefore the Mauritanian domestic market, with around **2,000 tonnes per year**, i.e. around one fifth to one quarter of the quantities distributed by the

⁵⁴ The outlets are rented by the SNDP, which also manages 3 employees per outlet.

⁵⁵ EUR 5 million tranche until 2018, then successive EUR 1.5 million tranche expiring at the end of March 2023. The SNDP is not aware of whether Spain will continue to fund it or not.

The mission was also informed that a study on the future of the SNDP is currently underway.

⁵⁶ This selling price has lately been authorised by the MPEM to be increased to 10 RUM per kilo.

⁵⁷ The SNDP's General Management indicates that the fixed costs amount to 18.5 RUM per kilo.

company. As the presence of these fleets has decreased significantly over the last two to three years (4-5 vessels are present all year round), the corresponding fees in kind have decreased accordingly, a decrease that SNDP has been able to compensate for by the increased landings by Turkish purse seiners.⁵⁸

The Table 9 below shows the quantities and origin of small pelagics received by the SNDP in Nouadhibou since 2014.

Table 9: Quantities and origin of small pelagics received by the SNDP in Nouadhibou since 2014

Year	Quantities (in t)	Year	Quantities (in t)
2014	6,520	2019	11,060
2015	7,593	2020	9,889
2016	9,628	2021	8,788
2017	8,504	2022 (until 11/11)	7,264
2018	10,916		

Source: SNDP-Nouadhibou

It should be recalled that under the EU/IRM Agreement, the SNDP must produce an annual report which is evaluated by the Joint Committee.⁵⁹

5.3.2 Landings and transshipments by EU vessels before export

As explained in section 2.1.2 above, vessels of the demersal and shrimp fleets (Categories 1, 2 and 2 bis and 3) are subject to the landing obligation, and **all pelagic freezer vessels are subject to the obligation to tranship at the quayside** or in the bay of a Mauritanian port. These operations are mainly carried out in Nouadhibou.

5.3.3 Summary of findings

About thirty non-tuna EU vessels and about thirty tuna vessels were granted fishing authorisations on an annual basis over the period 2017-2022.⁶⁰ Landing obligations are defined as follows:

1. Category 1 shrimp freezer vessels and category 6 pelagic freezer vessels are subject to a *fee in kind* in the form of a requirement to unload a certain proportion of their catch without receiving monetary payments for the catches involved;
 - The fee is 2% of the total by-catch for category 1 freezer vessels, and 2% of the total catch for category 6 pelagic freezer vessels;
 - Fees in kind i.e. catches, are remitted to the Société Nationale de Distribution de Poisson (SNDP) for distribution and sale on the national market.⁶¹

⁵⁸ Turkish purse seiners, which started operating in Mauritania in 2016, initially delivered poor quality products, as these were mainly intended for meal. They are starting to deliver better quality products, with SNDP focusing on the reception and distribution of three species, horse mackerel, mackerel and round sardinella (excluding sardines). As these three species were not caught by the seiners during the 1^{er} semester of 2022, the SNDP negotiated that the fee in kind would in fact be paid in cash during this period. During the second half of the year, the NPDS expects to receive a total of approximately 1,500 tonnes of these three species from the purse seiners.

⁵⁹ The 2018, 2019 and 2020 annual reports were provided to the mission. In addition, the CEO of SNDP (at NKT) and the Director of Procurement (at NDB) were met during the mission.

⁶⁰ Six categories of fishing vessels operate in the Mauritanian waters under the SFPA/Protocol, with a maximum number of vessels, a reference tonnage and a fee per ton for each category: Category 1 (Crustacean fishing vessels except lobster and crab); Category 2 (Black hake trawlers (non-freezers) and bottom longliners); Category 2a (Black hake freezer trawlers); Category 3 (Vessels fishing for demersal species other than black hake, with gear other than trawl - on ice); Category 4 (Tuna seiners (freezers)); Category 5 (Pole-and-line tuna vessels and surface longliners; and Category 6 (Pelagic freezer trawlers).

⁶¹ The SNDP was created in 2013 with Spanish funding, with the aim of promoting fish consumption and contributing to the food and nutritional security of the most disadvantaged Mauritanian populations, by making

2. Categories 1 (fresh fish), 2 and 2a and 3 are subject to a *landing obligation* (which does not require storage or processing in Mauritania) except for the last trip (that precedes departure from the Mauritanian fishing zones). Categories 4 and 5 are not subject to this obligation and land in their 'traditional' ports in west-Africa.
3. All pelagic freezer vessels (category 6) are subject to an *obligation to tranship* at the quayside or in the bay of a Mauritanian port, except for the last fishing trip.
4. Unloading operations are mainly carried out in Nouadhibou.
 - The freezer vessels (category 1 shrimp vessels and 2 hake vessels) disembark at the quayside at the Port Autonome de Nouadhibou (PAN), directly into containers on the quayside.
 - The fresh fish vessels (category 2 trawlers and hake longliners and category 3, demersal fishing vessels) unload at the quayside at the PAN, directly into isothermal trucks that transport the fish on ice to markets in the EU (in Spain, Portugal in particular).
 - Category 6 vessels disembark at the PAN or tranship in the bay.
 - Shipowners complain about the weaknesses of the harbour infrastructure and services in Nouadhibou (limited quay, limited availability of containers).
5. In practical terms, fish unloaded in Mauritania under the 'fee in kind' scheme represents limited quantities, as i) 2% of the by-catch from the Category 1 freezers represents only negligible quantities; and ii) there is only an annual average of 5 large trawlers of the Category 6 (mainly from Latvia and Lithuania) fishing for small pelagics, whose 2% of the total catch amounts to no more than 2 000 tonnes per year, distributed by SNDP in Mauritania. Products from Category 6 trawlers are frozen, and can't therefore be destined to fish meal production: **all fish unloaded by EU vessels is exclusively destined to human consumption.**
6. It is unlikely that the quantities of fish unloaded in Mauritania and distributed through the local market will increase significantly in the near future, unless the % of the fee in kind was to be increased (which may be unacceptable to the EU), and it is not clear whether more large trawlers for small pelagics will decide to operate in the Mauritanian waters in the short term.⁶² Landings could be increased under the 'fee in kind' scheme if more large trawlers are interested to fish under the conditions of the new Small Pelagics Management Plan (in more accessible fishing zones). The Pelagic Freezer-trawler Association (PFA), which represents 18 vessels from the Netherlands, Germany and Eastern European countries, has expressed interest in going back to Mauritania after 10 years of absence, but has however not yet decided to do so.

5.4 Use/employment of Mauritanian by EU vessels

5.4.1 Estimate of the number of Mauritanian seamen embarked on EU vessels

The Table 10 below summarises the number of Mauritanian seamen embarked on EU vessels, based on data from the Table 2 and the Table 3 above.

frozen fish available to them (about 8 000 tons per year) at a highly subsidised price. It has more than 400 distribution points in the country; the selling price is 10 RUM per kg (i.e. around EUR 0.3/kg), the quantity being limited to 2 kilos per person per day (see illustrations on the distribution process in Annex 2).

⁶² In the absence of selective gear such as the "NORMOR grid", the by-catch of shrimp trawlers remains important (in general it represents about 70% of catches). The SFPA allows 15% fish, 8% cephalopods and 10% crustaceans as bycatch. Although in terms of by-catch most vessels remain within the standards in quantity, it should be noted that octopus and crab are dominant, which represents an important commercial value.

Table 10: Estimated number of Mauritanian seamen embarked on EU vessels (average per year, period 2017-2022)

Category of vessel	No. of EU vessels	Mauritanian seamen			
		No. per vessel		No total	
		Minimum	Maximum	Minimum	Maximum
Category 1	8	7	9	56	72
Category 2	4	7	8	28	32
Category 2a	3	9	10	27	30
Category 3	4.5	6	7	27	31.5
Category 4	20	1	1	20	20
Category 5	10	3	3	30	30
Category 6	6	32	38	192	228
TOTAL	55.5	65	76	380	443.5

Source: Prepared by the mission

There are therefore a total of around 400 Mauritanian seamen on board EU vessels.

5.4.2 Seafarer employment (management, pay and working conditions)

Circonscription Maritime (CM) and shipowners agents - The Circonscription Maritime (CM) of Nouadhibou is responsible for aspects relating to safety and seafarers (notably the embarkation of Mauritanian seamen on fishing vessels, both foreign and national).

The latter indicates that in the case of pelagic trawlers operating under a free licence which, as for EU vessels, are obliged to take on board 60% Mauritanian seamen,⁶³ the choice of half of the 60% of seamen to be taken on board is left to the consignee, from a **list of unemployed persons** drawn up by the Maritime Division. **It would like the same rule to apply to EU vessels.**

It does not report any specific difficulties that would prevent EU shipowners from fulfilling their employment obligation or difficulties related to pay and working conditions (sometimes delays in the payment of wages without any consequences, and especially complaints about wage differences between foreigners and Mauritanians). Note that the Seafarers' Collective Agreement is being revised, together with the profession. The EUD for its part indicates that it is not aware of any problems related to the employment of Mauritanian seamen.

According to the Collective Agreement for Seafarers, a seafarer onboard receives about 10,000 RUM per month, i.e. about EUR 300 (corresponding to the minimum wage of 5,200 RUM per month and a boarding allowance), and a seafarer on land receives about 7,600 RUM per month, i.e. about EUR 225 (in the event of illness for example).

As an indication, in 2022 (until the end of September) the CM counted 224 Mauritanian and 255 foreign seamen on the Spanish shrimp and hake vessels, 88 Mauritanians and 64 foreigners on the two licensed Lithuanian pelagic vessels, and 499 Mauritanians and 415 foreigners on the 'free licence' vessels (under Russian, Cameroonian and Belizean flags).

For their part, the consignees representing the EU shipping companies whose vessels are licensed to fish in Mauritania (see Table 2) and who were contacted locally after this mission confirm that the rates of embarked seamen are respected.

⁶³ Chinese and Turkish purse seiners operate under national flags and are therefore not obliged to take on board Mauritanian seamen. However, a Turkish seiner with a crew of 20 to 30 seamen in total takes on board 10 to 15 Mauritanian seamen.

Recent achievements - The L2P 2022-2024 mentions the following achievements and needs in terms of seafarer management:⁶⁴

- Mastering the **identification of** seafarers, against the need to move progressively towards the establishment of identity documents for seafarers, in accordance with ILO requirements;
- Reorganising the situation of the maritime workforce by requiring the embarkation of seafarers who hold a **maritime passport** and are regularly registered;
- The strict application of the regulations on the **effective embarkation of** Mauritanian seamen and the setting up of a monitoring commission with the stakeholders (unions, operators);
- The **management of seafarers' careers**, in particular through the establishment of an Intranet database of the movement of seafarers involving the DMM, the Circonscription Maritime and the ACNAV;
- Improving the issuing of **STCW certificates, which** includes preparing for the reinstatement of Mauritania on the **IMO “White List”** and adopting a secure model STCW certificate. **This is particularly important in view of the potential for officers, especially on EU fishing vessels** (see below).

As reported above, the fleets of EU vessels operating in the Mauritanian EEZ under the EU/IRM SFPAs correspond to an average of **around sixty** licensed vessels over the year as a whole, i.e., according to the Mauritanian embarkation obligations stipulated in the SFPAs, around **400 Mauritanian seamen**.

Certification - In terms of jobs on board fishing vessels ('seafarers'), a distinction is made between the levels of “officer” and “sailor”.

Officers - In 1991 and with a view to the ‘Mauritanianisation’ of the crews of fishing vessels, two training courses for officers, deck and machine, were introduced. These officers are currently trained by the École Supérieure des Officiers, placed under the authority of the Naval Academy created in 2014.

In order for Mauritanian **officers** to be employed on foreign vessels, Mauritania must be able to issue certificates that comply with international standards, in this case the STCW Convention-95,⁶⁵ which implies that the country is included on the ‘White List’ established by the International Maritime Organisation (IMO). Mauritania has been on this list since 2008, but this has not been the case since 2014, when the fisheries training changed its supervision and status. Mauritanian officers are therefore currently unable to be formally employed for such positions on foreign vessels because they do not have STCW certificates. Some officers are indeed employed, but they are not in a position to perform functions requiring STCW certification.

The advantage of holding these international certificates is the interchangeability of seafarers on the ships as they are trained according to the same reference framework and the issuance of certificates is controlled by the administration.

The European fleet, which is potentially the largest in terms of vessels operating in Mauritania's EEZ, could offer more jobs to Mauritanian officers, in well-paid positions of responsibility, if they held STCW titles.

In order to obtain STCW recognition and thus improve their employability, Mauritanian officer-trainees are hosted in Morocco (at the Institut Supérieur d'Études Maritimes in

⁶⁴ L2P also recalls that the challenge of promoting jobs in the fisheries sector and the maritime economy also includes the challenge of promoting employment on support vessels for offshore mining platforms.

⁶⁵ STCW: *Standard Training Certification Watchkeeping*.

Casablanca), a country on the White List, to acquire the 9 certificates necessary to complete their training.

Mauritania's re-inclusion on the 'White List' is conditional on the transmission to IMO of an independent audit report proving that Mauritania fully complies with the provisions of the Convention. This process is currently underway.

Sailors - In the 1980s, long initial training courses (9 months) were set up leading to the qualifications of Qualified Sailor ("Matelot Qualifié") and Oil Mechanic Worker ("Ouvrier Mécanicien Graisseur").

In order to embark on foreign vessels, sailors must hold the internationally recognised Basic Safety Certificate⁶⁶ which Mauritania is currently unable to issue. It should be recalled that this requirement, for seafarers employed on fishing vessels, falls under the STCW-F Convention,⁶⁷ as mentioned in the current Protocol (Appendix 11).

5.4.3 Summary of findings

1. EU shipowners whose vessels operate in the Mauritanian waters under the current Protocol comply with their obligations in terms of employment of Mauritanian crew, for all categories of vessels.
2. There are a total of around 400 Mauritanian seamen on board EU vessels, largely because the Protocol specifies a minimum number of Mauritanian seamen to be embarked on different vessels as follows:
 - for tuna purse seiners, one person per vessel;
 - for pole-and-line tuna vessels, three persons per vessel;
 - for shrimp and demersal vessels, 60% of the crew rounded down, with officers (ship's master, auxiliary or coastal master, engine assistant and first engineer officer) not included in this count;
 - for pelagic trawlers, 60% of the personnel operating in production functions (factory, packing and freezing).
3. In order to embark on foreign vessels, sailors should hold the internationally recognised Basic Safety Certificate which Mauritania is currently unable to issue because the country is not on the IMO "White List" (therefore the seamen embark without this certificate). In addition, Mauritania's re-inclusion on the 'White List' for certification of officers is conditional on the transmission to IMO of an independent audit report proving that Mauritania fully complies with the provisions of the Convention. This process is currently underway.

⁶⁶ Failure to do so may result in a vessel being apprehended in waters or ports outside Mauritania and fined if checked.

⁶⁷ International Convention on Standards of Training, Certification and Watchkeeping for Fishing Vessel Personnel (STCW-F Convention) of the International Maritime Organisation.

6. How to design and implement the sectoral support component of the SFPA more effectively: Findings

This section considers issues related to improve the functioning of the sectoral support funding, with a special interest in better integration with international cooperation projects, and especially to support local value chains of small scale fishery products, gender equality, and food security.

Sectoral support 'contributes to the implementation of the sectoral fisheries policy defined by Mauritania. This sectoral support contributes to the development of sustainable fishing in Mauritania, dissociated from the access of EU vessels to the fishing zone. It contributes to the implementation of national strategies for the sustainable development of the fisheries sector on the one hand, and for the protection of the environment, coastal zones and marine protected areas on the other'.⁶⁸

6.1 Sectoral support content

Key findings in terms of the content of the sectoral support are:

1. The financial support for the promotion of responsible and sustainable fisheries has historically been composed of eight areas of intervention: Area 1: Preservation of the marine and coastal environment; Area 2: Strengthening monitoring, control and surveillance of fishing activities; Area 3: Strengthening scientific research; Area 4: Strengthening the sector's information system; Area 5: Hygiene and quality of fishery products; Area 6: Infrastructures for the promotion of human consumption of fishery products; Area 7: Support to artisanal fisheries and coastal communities; Area 8: Technical assistance. For the 2015-2020 period:
 - Areas 2, 5 and 6 are most strongly supportive of food security and account for 31 % of total sectoral support funds.
 - Area 7 most directly supportive of small-scale fisheries is not budgeted as such, but part of Area 6⁶⁹ is dedicated to infrastructure linked to small-scale fisheries and accounts for 20 % of sectoral support funds.
2. All the main areas of intervention defined in the Protocol were supported during the period 2008-2019, for a total of EUR 87.6 million. During the periods 2015-2019 and 2019-2020, for a total of EUR 20.63 million, the construction of the Port of Tanit (41% of the total), the Mauritanian Coastguard (GCM) (25%), Fisheries Research Institute (IMROP) (13%), the Preservation of the Marine and Coastal Environment Area (13%) and Naval Academy (ACNAV) (5%) were supported more specifically.
3. For the current Agreement 2021-2026, the programming process is not yet underway, as each potential beneficiary institution is yet to identify its needs. It is also planned that part of the artisanal landing site 'PK 93 development' project would be financed under the current Protocol (see section 3.3.2 above), and a co-funding of EUR 2.5 million with KfW for the construction of the Operational and Scientific Complex (for the Mauritanian Coastguard (GCM) and the Fisheries Research Institute (IMROP) cluster) is foreseen in Nouadhibou.
4. The mission identified areas of intervention to meet certain needs which are mentioned in the Policy and Planning Letter 2022 - 2024 (L2P - 2022-2024) but for which concrete actions seem not to have been defined and implemented to date.

⁶⁸ Current Protocol, Article 8.

⁶⁹ It includes half the budget for the construction of Tanit port (considering that half the port is dedicated to industrial fishing and the other half to artisanal fisheries).

These are in particular: i) the management of waste from fishing vessels (a subject which is naturally much broader than for EU vessels alone); ii) the scientific observer programme; and (iii) the certification of Mauritanian seamen.

6.2 Sectoral support processes

Key findings in terms of the processes of the sectoral support are:

1. There have been significant delays in implementing the sectoral support envelopes during previous Agreements, leading to a delay in the programming of the sectoral support of the Protocol to the current SFPA. This delay is still prevailing: as of the 3rd mission of the study, this matrix was not yet finalised/sanctioned by the Minister of Fisheries.
2. According to the wishes of the Mauritanian authorities and the EU expressed over several years, the implementation and operationalisation of the 'Sectoral Budget Support Coordination Unit'⁷⁰ for the rigorous management and monitoring of the funds and activities financed by it, and more broadly, to ensure coherence with the interventions of other partners, remains on the agenda even though it was created at the end of 2021.⁷¹
3. The national stakeholders representing the small-scale/artisanal sector were/are not involved or consulted by government, for the design of the multi-annual programme for the sectoral support funding provided under the SFPA, or during its implementation. They wish to be involved in the whole process, to increase the likelihood of the sectoral support being responsive to small-scale fisheries needs. There is no appropriate involvement of small-scale fisheries organisations and their representatives which would ensure consultation/participation with the sub-sector i) during the preparation/negotiation of any future SFPA, ii) during the preparation of the multi-annual matrix and iii) during the Joint Committee meetings.
4. There is no publicly available real-time or periodic reporting on use of sectoral support funds.
5. The EU fisheries attaché based in the EUD in Nouakchott is intensively involved with the MPEM (in particular, the Programming and Cooperation Directorate - DPC) for the preparation of annual sectoral support implementation reports and of subsequent annual plans, which are analysed during the Joint Committee meetings.
6. Overall, small-scale fisheries interests are currently poorly informed about sectoral support implementation or plans with regards to activities still to be implemented, and are hardly involved in their definition. The MPEM is however receptive to greater participation and transparency over the planning and use of sectoral support.

⁷⁰ Article 8: 'Sectoral support shall be implemented with the support of a coordination unit, responsible for following up the decisions of the joint commission'. It should be noted that the operationalisation of this Unit was already foreseen in the previous Protocol.

⁷¹ Order No 1238 of 02/11/2021. Article 1: The Unit is created in application of the 2021-2025 Protocol in the framework of the RIM/EU SFPA. Article 6: The Unit has a budget from the State Budget and a Sectoral Support Envelope dedicated to its functioning, the annual amount of which is determined by the RIM/EU Joint Committee. Article 10: The staff of the Unit, which is coordinated by the Director General of DGERH, President of the Mauritanian Party to the Joint Commission, comprises members including an experienced assistant, an administrative and financial officer, a secretary and a driver, appointed by the Minister.

7. Conclusions and recommendations for a strategy to increase the benefits of the SFPA to Mauritania

This final section builds on the findings presented in preceding sections to generate key conclusions, and recommendations. They were presented at the national workshops in Nouakchott and Nouadhibou. Major conclusions and recommendations validated and agreed upon during the workshop are presented below.

7.1 EU vessel landings and employment on EU vessels

7.1.1 Conclusions

Negative

1. Fish unloaded in Mauritania under the 'fee in kind' scheme represents limited quantities, as i) 2% of the by-catch from the Category 1 freezers represents only negligible quantities; and ii) there is only an annual average of 5 large trawlers (mainly from Latvia and Lithuania) fishing for small pelagics, whose 2% of the total catch amounts to no more than 2 000 tonnes per year, distributed by SNDP in Mauritania.
2. It is unlikely that the quantities of fish unloaded in Mauritania and distributed through the local market will increase significantly in the near future. It would be the case if the % of the fee in kind was to be increased, which may be unacceptable to the EU and the shipowners. In addition, it is not clear whether more small pelagics trawlers (Category 6) will decide to operate in the Mauritanian waters in the short term: landings could be increased under the 'fee in kind' scheme if more large trawlers are interested to fish under the conditions of the new Small Pelagics Management Plan (in more accessible fishing zones). The Pelagic Freezer-trawler Association (PFA), which represents 18 vessels from the Netherlands, Germany, France, Great-Britain, Poland and Lithuania, has expressed interest in going back to Mauritania after 10 years of absence, but has however not yet decided to do so.
3. All catches unloaded by EU vessels other than Category 6 (small pelagics) are bound for export (either fresh/by truck or frozen/by container) and are not likely to be channelled for consumption on the local market.
4. Under the present Protocol, tuna operators (purse seiners and pole-and-line vessels) are exempted from landing the catches they fish in Mauritanian waters in Mauritania. This is linked to the absence of tuna processing facilities in the country, and to the strong comparative advantage of tuna landings hub for EU vessels, such as Dakar, Abidjan and Victoria (Seychelles), which are not likely to be altered in the near-medium term..
5. Port infrastructures and services in Nouadhibou would need to be improved as present weaknesses of the PAN provokes some delays and over costs for the port operations of the EU vessels.
6. The issue of wage discrimination for equal employment between Mauritanian and foreign seafarers, and positions held by foreigners which could possibly be filled by nationals on board EU vessels deserves to be carefully addressed.
7. The issue of the country's non-suitability to issue the Basic Safety Certificate (CBS), which is essential for Mauritanian seafarers to be able to board EU vessels, remains critical.

Positive

1. Landings from EU small pelagics vessels under the 'fee in kind' scheme accounts for a significant part of the volumes of fish received then distributed inland by the SNDP, thus contributing to the national food security.
2. All fish unloaded by Category 6 EU vessels is frozen and is therefore exclusively destined to human consumption (i.e. none goes to the fish meal production).
3. It is estimated that there are a total of around 400 Mauritanian seamen on board EU vessels, in accordance to the obligations stipulated in the SFPA, which represents quite a significant number of crew.
4. No specific difficulties that would prevent EU shipowners from fulfilling their 60% obligation or difficulties related to employment were reported by the Mauritanian Circonscription Maritime and the local agents of the EU shipowners (with the exception of some issues mentioned above). The EUD for its part indicates that it is not aware of any problems related to the embarkation of Mauritanian seamen.
5. Recent investments in on-shore processing of small-pelagics into cans is providing local on-shore benefits.
6. The potential increase of the presence of small pelagics EU vessels as a consequence of the newly established small pelagics management plan would necessarily imply the employment of additional Mauritanian crew on board these vessels (60% of the production staff, i.e. about 35 persons per vessel, as per the employment obligations stipulated in the current Protocol). There is indeed a pool of experienced seafarers, some presently unemployed, who would be likely to be employed on these vessels.

7.1.2 Recommendations

1. For the country to be able to improve the employment of Mauritanian professionals, several solutions are possible: i) ensure that Mauritania is back on the IMO "White List" or ii) alternatively, relocate training from Dakar, the Canary Islands or Morocco, by bringing in approved trainers from the corresponding countries to provide CBS training to seafarers; and for officers, send a group of graduates for training to Morocco. The process of re-inscription on the "White List" needs to be dealt with and finalized urgently, in consultation between ACNAV, the Maritime Affairs Administration and the IMO.
2. There is an urgent need to finalise the revision of the Seafarers' Collective Agreement in order to ensure full satisfaction of the EU stakeholders and the Mauritanian stakeholders involved (authorities and professionals) as regards crew employment.
3. Assess support needed to incentivize more on-shore canning of small pelagics in the country.

7.2 Maximising the potential of sectoral support to domestic fisheries value chains, gender equality, and food security (including through enhanced integration with international cooperation projects)

7.2.1 Conclusions

Negative

1. The programming of the SFPA Sectoral Support for the current Protocol is continuing and has been protracted.

2. Many representatives of the profession and civil society deplore the fact that they are not involved in the negotiation of the SFPA, nor in the planning and monitoring of the Sectoral Support. The establishment of a committee to that effect is recommended.
3. There is no formal and regular forum where the MPEM and TFPs meet to share information about policy implementation and fisheries development, and to make decisions about activities, projects and programmes to be undertaken. This raises the risk of a lack of coherence between the actions of donors and government and that of activities planned as part of the sectoral support.

Positive

1. The content of the sectoral support as it currently stands is highly supportive of small-scale fisheries and food security.
2. There is some coordination and integration of sectoral support funding with other donor support (namely, the co-funding of the construction of the Tanit port under a previous protocol; the foreseen co-funding of the landing site at PK 93).

7.2.2 Recommendations

1. The actual implementation of the long-awaited SS monitoring unit within the MPEM should be materialized urgently, in order to contribute to finding a solution to the recurrent delay in the programming of the SFPA Sectoral Support.
2. During the implementation of the current Protocol, an annual meeting should be held by the MPEM with relevant stakeholders, including small-scale fisheries organisations, to report on the implementation of the sectoral support over the previous year and the plans for its implementation in the coming year.
3. When Joint Committee meetings take place in Nouakchott (rather than in Brussels), consideration could be given by the EU and the MPEM to allowing observer status to a small number of small-scale fisheries representatives for some parts of the Joint Committee meeting.
4. The MPEM should make publicly available the annual implementation reports submitted to the Joint Committee.
5. A fisheries sector donor coordination committee should be established by the MPEM with relevant TFPs, with meetings to take place at regular intervals (i.e. once every 3, 4 or 6 months).
6. A significant amount of the Sectoral Support of the current Protocol (2021-2026) should be dedicated to coastal communities, artisanal fisheries and women's associations, in particular:
 - To develop landing sites / infrastructures along the coast (completion of PK 93 , improvement and extension of EPBR, development of the adjacent Cherka area in Nouadhibou, taking into account the on-going projects (e.g. the *current KfW project 'Support to EPBR'*)
 - To improve safety at sea for artisanal fishermen, which is a major problem (lack of life-saving equipment; no coastal distress communication system, insufficient search and rescue capabilities and devices at sea). This aspect should urgently be matter for a detailed study in view to implementing adequate means in terms of materials and training.
 - To reduce post-harvest losses to increase the production of fish for human consumption, building on the positive results achieved through the GIZ component of Promopêche (*in coordination with the forthcoming KfW 'Value chains development' project*).

Annex 1: National workshop report

Atelier concernant l'accord de partenariat dans le domaine de la pêche durable (APPD) entre l'UE et la Mauritanie (Nouakchott le 21 juin et Nouadhibou le 23 juin 2023)

COMPTE-RENDU

Présentation générale

Un Atelier concernant l'Accord de Partenariat dans le domaine de la Pêche Durable (APPD) entre l'UE et la Mauritanie a eu lieu en deux sessions d'une demi-journée chacune, à Nouakchott le 21 juin et à Nouadhibou le 23 juin 2023, dans le cadre d'une étude financée par la Coopération allemande (BMZ) et sous l'autorité du Ministère des Pêches et de l'Economie Maritime (MPEM).

L'Atelier, organisé de concert entre le MPEM et le consultant national pour l'étude, M. Babana Ould Yahya, a été dirigé à Nouakchott par Dr. Barham, Directeur de la Programmation et de la Coopération (DCP), Secrétaire Général par intérim du MPEM et à Nouadhibou, par M. Mohamed Zehave, Chef de la Circonscription Maritime.

Participation

24 personnes ont participé à la session de Nouakchott et 41 à celle de Nouadhibou, selon la répartition suivante (voir le détail en Annexe 1):

Entité	Nouakchott	Nouadhibou
MPEM	11	2
Entités rattachées au MPEM	1	5
Organisations socio-professionnelles (OSP)	7	15
Partenaires Techniques et Financiers (PTF)	2	0
Syndicats de marins	0	12
Autres	3	7
TOTAL	24	41

À souligner que dans les deux cas, la mobilisation préalable des participants a été telle que la présence aux sessions a été conforme aux attentes⁷², avec à Nouakchott, une forte représentation du MPEM et des OSP et, à Nouadhibou, une représentation particulièrement importante des OSP et des syndicats de marins. Des illustrations des travaux des sessions figurent en Annexe 2.

Thèmes abordés

Après l'ouverture des sessions, les représentants du MPEM ont rappelé les deux objectifs principaux de l'Étude, à savoir :

- Comment mettre en œuvre plus efficacement la **composante d'appui sectoriel des APPD** en fonction des priorités nationales des partenaires, la coopération au développement et les besoins des acteurs de la pêche artisanale? Recommandations pour les APPD et pour un soutien supplémentaire requis par les pays partenaires ?
- Comment garantir aux pays tiers partenaires des **avantages** accrus découlant des activités de la flotte de l'UE en termes de **débarquements de poisson** et d'**emploi**

⁷² Avec néanmoins quelques entités non représentées: SNDP, DARE/MPEM et GIZ à Nouakchott ; IMROP et ONISPA à Nouadhibou.

dans les pays tiers partenaires, afin de contribuer à la sécurité alimentaire et aux avantages socio-économiques nationaux ?

Le consultant international a ensuite présenté un document Powerpoint (voir en Annexe 3), comprenant i) un rappel des objectifs, livrables et principales phases de l'Étude, ii) les principales observations et recommandations préliminaires des deux missions déjà réalisées dans le cadre de cette étude en Mauritanie, et iii) l'ensemble des 5 thèmes à aborder durant le présent Atelier, à savoir :

1. **Appui Sectoriel et pêche artisanale** - Comment accroître les avantages et quelles devraient être les priorités de l'appui sectoriel de l'APPD, en particulier en ce qui concerne le sous-secteur de la **pêche artisanale**?
2. **Débarquements et sécurité alimentaire** - Comment améliorer la **sécurité alimentaire** grâce à l'augmentation des captures destinées à la consommation humaine dans le pays et dans la région, et comment l'APPD peut-il y contribuer ?
3. **Emplois et genre** - Comment l'APPD peut-il être mis à profit pour offrir d'avantage **d'emplois** et améliorer l'implication des **jeunes et des femmes** dans le secteur de la pêche ?
4. **Concertation avec / implication de la profession** - Comment l'APPD peut-il servir à améliorer la **participation et l'inclusion** des parties prenantes et des représentants de la pêche artisanale dans les processus de décision qui concernent leurs moyens de subsistance ?
5. **Complémentarité PTF** - Comment faire en sorte que les activités complémentaires des **PTF** puissent contribuer à maximiser les avantages des APPD pour la Mauritanie ?

Suite à cet exposé, les participants ont présenté des commentaires sur les points abordés dans la présentation. Au besoin, des clarifications ont été apportées par les consultants.

Principales observations et recommandations

Les principales observations et recommandations résultant des deux sessions de l'Atelier sont synthétisées ci-après⁷³.

En termes de bien-fondé de l'APPD :

1. Plusieurs participants ont émis l'opinion que les APPD successifs avec l'UE n'ont eu l'effet escompté auprès de la PA et n'ont pas contribué de manière significative à la création d'emplois, notamment pour les jeunes et les femmes. Selon eux, les APPD avec l'UE comme les activités d'autres partenaires étrangers tels que turcs et chinois posent des problèmes, notamment en ce qui concerne i) l'exploitation des ressources (risque d'effondrement des stocks) et ii) la disponibilité de poisson pour la population nationale (difficulté de trouver du poisson à un prix abordable).
2. La DUE a fait remarquer que la flottille européenne ne représente qu'environ 3,5% du total des captures réalisées en Mauritanie (1 à 1,1 millions de tonnes par an) et ne peut donc pas être considérée comme source essentielle de ces problèmes.
3. De façon générale, la question est de savoir comment mieux utiliser les fonds de l'UE pour la protection des ressources, étant clarifié qu'outre la contribution financière et le montant de l'Appui Sectoriel (AS) dans le cadre de l'APPD, l'UE finance également des opérations par l'intermédiaire d'un budget additionnel de coopération (projet Promopêche) et d'un budget prévu dans la programmation à venir (projet économie bleue).

Par rapport au point 1 (AS et pêche artisanale):

⁷³ Le thème général de la sécurité alimentaire, et notamment la problématique « plus de poisson pour la consommation humaine et moins pour la farine » a certes été détaillé par le consultant international au cours de son exposé, mais il n'a pas donné lieu à des contributions spécifiques de la part des participants.

4. La DUE précise qu'elle souhaite qu'un certain montant de l'Appui Sectoriel du Protocole en cours (2021-2026) soit consacré aux communautés côtières, à la pêche artisanale et aux associations de femmes, montant qui serait disponibilisé au travers d'appels à propositions. Il est par ailleurs rappelé que l'AS sert à appuyer la mise en œuvre de la Politique nationale de développement des pêches, et que la décision concernant l'allocation des fonds de l'AS n'est pas prise unilatéralement par l'UE, mais de concert avec les autorités de tutelle, au cours des réunions de la Commission Mixte.
5. Il est important de développer des débarcadères / **infrastructures** tout le long du littoral, à l'instar du PK 93 (avec route d'accès et électrification notamment). En outre, les conditions de l'EPBR devraient être améliorées (*NB : c'est prévu dans le cadre du projet KfW en cours*) et son extension ~~prév~~ue est nécessaire compte tenu de sa saturation. L'aménagement de la Tcherka à Nouadhibou devrait aussi être prioritaire.
6. La nécessité de pouvoir disposer d'une capacité de **stockage/congélation** importante pour la PA est mentionnée à plusieurs reprises, afin d'éviter la spéculation sur les prix de la part des usiniers (*NB : c'est prévu dans le cadre du projet KfW en cours*).
7. **Le thème de la sécurité en mer est mentionné, à Nouakchott comme à Nouadhibou, comme étant un problème majeur de la PA** : manque d'équipements de sauvetage (les projets en cours ne fournissent que des quantités limitées par rapport aux besoins) ; nécessité de mettre en place un dispositif de communication de détresse couvrant tout le littoral (balises, couverture téléphonique) et d'améliorer les moyens et dispositifs de recherche et de sauvetage en mer⁷⁴.
8. Les résultats positifs en termes de réduction des pertes post-captures obtenus grâce à **la composante GIZ de Promopêche** sont très significatifs et cette initiative devrait être élargie de façon à augmenter la production de poisson apte à la consommation humaine.
9. Il est notamment recommandé qu'une **cellule de projets** soit mise en place au sein du MPEM (DPC) afin d'analyser des projets soumis par la société civile, pour lesquels une enveloppe serait réservée dans le cadre de l'AS.
10. Autres points mentionnés :
 - Renforcement des capacités des **organisations socio-professionnelles** ;
 - Amélioration des conditions de **transport** de poisson (motos munies de caisses à glace) et création de **points de vente** de poisson (*NB : prévu dans le cadre du projet « chaînes de valeur » de la KfW*) ; appui à des coopératives pour la vente de détail à la population ;

⁷⁴ Le Promopêche BIT avait tout un volet Sécurité et Santé au travail. Entre autres, dans ce volet il y a eu les activités suivantes :

- Diagnostic sur les accidents du travail et guide de prévention des risques professionnels, ainsi que sensibilisation sur les sites de débarquement auprès des professionnels de la PA, y compris de visites médicales gratuites avec l'Office national de la médecine du travail (ONMT) ;
- Tentative de redynamisation du comité du dialogue social de la pêche, avec des études et ateliers.

Par ailleurs, les deux projets société civile d'appui à la FNPA ont permis :

- De mettre en place un système de contrôle et surveillance communautaire à travers duquel sont signalés entre autres des accidents et problèmes de sécurité ;
- De renforcer la FNPA dans son rôle de promoteur de la protection sociale des professionnels de la pêche artisanale, avec près de 500 adhérents de la FNPA cotisant à la CNAM à travers l'accord entre la FNPA et la CNAM.

- **Formation**, disponibilisation de **micro-crédit** et équipements pour des **femmes commerçantes** de poisson au détail (*idem*) ;
 - Formation des **classificateurs** (*idem*) ;
 - Appui aux **communautés côtières** (Imraguen, de N'Diogo etc.) pour la valorisation des produits de la pêche.
 - Ouverture d'une **caisse complémentaire** pour les marins.
11. Le **Chantier Naval de Mauritanie - CNM** souligne l'importance de ses activités pour le développement et la modernisation de la flotte de pêche artisanale et côtière visant la création de nouveaux emplois, tel qu'indiqué dans la L2P, et souhaite que le chantier figure parmi les bénéficiaires de l'Appui Sectoriel ; en particulier, pour i) la construction de senneurs pour ravitailler le marché national, ii) le renforcement de son service après-vente, iii) la diversification de ses produits et iv) l'amélioration de ses capacités pour être en mesure d'assurer les réparations courantes des navires de l'UE.
12. Le Président de la FLPA-Nouadhibou informe qu'il a eu l'opportunité de se rendre à Bruxelles le mois dernier pour présenter le **plaidoyer de la profession** visant notamment à ce que l'Appui Sectoriel donne priorité à la PA et qu'il y ait plus de transparence par rapport à celui-ci (voir le compte-rendu de la conférence correspondante).

Par rapport au point 3 (Emplois et genre):

13. Des représentants des syndicats soulèvent la question de la **discrimination** en termes de salaires, à poste égal, entre les marins mauritaniens et les marins étrangers à bord des navires UE ; de plus, des postes occupés par des étrangers pourraient être occupés par des nationaux. Il est en outre indiqué par le MPEM que la **Convention Collective des Gens de Mer** est en cours de révision, de concert avec la profession.
14. La question de la non-aptitude du pays à décerner le **certificat de base de sécurité (CBS)**, indispensable pour que des marins mauritaniens puissent être embarqués à bord de navires de l'UE, est clarifiée par le consultant national. Plusieurs solutions sont envisageables pour pallier cette situation et améliorer ainsi l'emploi de professionnels mauritaniens: i) faire en sorte que la Mauritanie figure à nouveau sur la « Liste Blanche » de l'OMI ou ii) alternativement, délocaliser la formation de Dakar, des Canaries ou du Maroc, en faisant venir des formateurs agréés des pays correspondants pour dispenser la formation « CBS » aux marins, et pour les officiers, envoyer un groupe de lauréats en formation au Maroc. Le consultant indique en outre que le processus de réinscription à la « Liste Blanche » est en cours, en concertation entre l'ACNAV, l'Administration des Affaires Maritimes et l'OMI.
15. Certains participants mentionnent le fait que beaucoup de jeunes ont été formés mais ne sont pas intégrés et soulignent le caractère informel des opérateurs de la pêche artisanale; **la profession devrait être formalisée**, à l'instar des mareyeurs (carte de mareyeur).

Par rapport au point 4 (Concertation avec / implication de la profession) :

16. De nombreux représentants de la profession et de la société civile déplorent le fait **qu'ils ne sont impliqués** ni dans la négociation de l'APPD, ni dans la planification et le suivi de l'AS. Certains recommandent la mise en place d'un **comité** pour ce faire.
17. La question du **retard dans la programmation** de l'AS de l'APPD est soulevée, la mise en œuvre de la **cellule de suivi** de l'AS devant contribuer à y apporter une solution.

Par rapport au point 5 (Complémentarité PTF):

18. Le co-financement de l'AS au projet d'appui de la **JICA** à l'ONISPA est souligné comme étant très bénéfique.

19. **L’Autorité de la Zone Franche de Nouadhibou (AZPN)** indique l’existence **d’un projet de station d’épuration** pour la zone industrielle de Nouadhibou. Le projet comprend la construction des réseaux (qui sera à la charge de l’AZPN) et la construction de la station elle-même qui nécessite un financement. À cet effet, l’AZPN suggère d’étudier la possibilité d’une prise en charge de ce financement par l’Appui Sectoriel.

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Annexe 1 – Listes de participants et feuilles de présence**Nouakchott (24 personnes) :****MPEM (11):**

- DPC (3), DDVP (1), OESP (1), DA (1), LT (1), conseiller juridique (1), chargé de mission (1)
- Conseillers Techniques (2) – UE/Promopêche et JICA

Organisations socio-professionnelles (7)

- Fédération Libre de la Pêche Artisanale (1)
- Fédération Nationale de la Pêche Artisanale (1)
- ASSPCI (1)
- LNDAN ? (1)
- Fédération Mauritanienne des Mareyeurs - FMM (2)
- Fédération des Pêcheurs, Mareyeurs, Expéditeurs, Distributeurs et Collecteurs – FPMEDC (1)

Partenaires Techniques et Financiers (2)

- Délégation de l'Union Européenne (2) – Attaché Pêche et Chargée de Programmes

Entités rattachées au MPEM (1)

- CQFMP (1)

Autres (3)

- ONG « Mauritanie 2000 » (1)
- Journaliste (1)
- LUSOMAR, armement national (3)

Atelier concernant l'accord de partenariat dans le domaine de la pêche durable (APPD) entre l'UE et la Mauritanie
 Nouakchott, 21 juin 2023

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Nouadhibou (41 personnes) :**MPEM (2)**

- Circonscription Maritime (1)
- Antenne MPEM (1)

Organisations socio-professionnelles (15)

- Fédération Libre de la Pêche Artisanale – FLPA (1)
- Fédération Nationale de la Pêche Artisanale - FNPA (4)
- Fédération Nationale de la Pêche - FNP (5)
- Fédération Mauritanienne de la Pêche – FMP (2)
- Fédération des Pêcheurs, Mareyeurs, Expéditeurs, Distributeurs et Collecteurs – FPMEDC (3)

Syndicats de marins (12)

- SLPIM
- USMTM
- ACPNB
- UPIM
- SNTM
- CGTM
- UTM/N (2)
- DRCITM
- GCIM
- UNPAM
- UNSTM

Entités rattachées au MPEM (5)

- Garde-Côtes de Mauritanie – GCM (2)
- Chantier Naval de Mauritanie – CMN (2)
- Établissement de la Baie du Repos – EPBR (1)

Autres (7)

- Académie Navale (1)
- Autorité de la Zone Franche de Nouadhibou - AZFN (3)
- Journaliste (2)
- Plateforme du secteur de la Pêche 2030 (1)

Annexe 2 – Illustrations relatives aux sessions

Nouakchott



Nouadhibou





Annexe 3 – Présentation Powerpoint





وزارة الصيد والاقتصاد البحري
 MINISTERE DES PECHES ET DE L'ECONOMIE MARITIME



Potentiels des Accords de partenariat pour une pêche durable de l'UE et de la coopération au développement pour le développement durable des filières locales de produits de pêche

financé par le
 Ministère fédéral allemand de la
 coopération économique et du développement - BMZ

Atelier de consultation

Nouakchott - 21 juin 2023
 Nouadhibou, - 23 juin 2023







Ordre du jour de l'Atelier

- 1 - Objectifs, livrables et activités clés de l'Étude**
- 2 - Principales conclusions des missions 1 et 2 en Mauritanie**
- 3 - Thèmes à aborder dans le cadre du présent Atelier**



1. Objectifs, livrables et activités clés de l'Étude

Objectifs

- Comment mettre en œuvre plus efficacement la **composante d'appui sectoriel des APPD** en fonction des priorités nationales des partenaires, la coopération au développement et les besoins des acteurs de la pêche artisanale ? Recommandations pour les APPD et pour un soutien supplémentaire requis par les pays partenaires ?
- Comment garantir aux pays tiers partenaires des **avantages** accrus découlant des activités de la flotte de l'UE en termes de **débarquements de poisson** et d'**emploi** dans les pays tiers partenaires, afin de contribuer à la sécurité alimentaire et aux avantages socio-économiques nationaux ?



2. Principales conclusions des missions 1 et 2 en Mauritanie

Caractéristiques générales de APPD/Protocole: période 2021-2026 (6 ans); opportunités de pêche pour 6 catégories de navires; contribution financière UE 57,5 Mio EUR par an; appui sectoriel 16,5 Mio EUR sur la période

A - Débarquements et emplois avec les navires UE

Débarquements

- Six **catégories** de navires de pêche, avec nombre maximum, TAC ou tonnage de référence et redevance par tonne :
 - Catégorie 1 (chalutiers congélateurs **crustacés** sauf langouste et crabe);
 - Catégorie 2 (chalutiers non congélateurs et palangriers de fond **merlu noir**); Catégorie 2a (chalutiers congélateurs merlu noir);
 - Catégorie 3 (espèces **démersales** autres que merlu noir, engins autres que chalut – en frais);
 - Catégorie 4 (**thoniers** senneurs congélateurs);
 - Catégorie 5 (**thoniers** canneurs et palangriers de surface); et
 - Catégorie 6 (chalutiers congélateurs de pêche **pélagique**).
- Une **trentaine** de navires de l'UE non thoniers et une **trentaine** de thoniers ont obtenu des autorisations de pêche sur une base annuelle au cours de la période 2017-2022

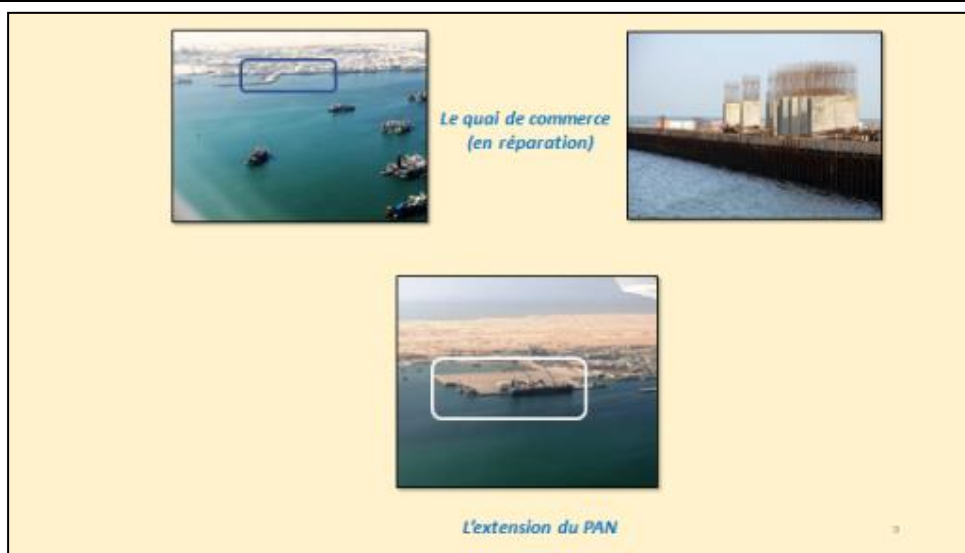
- **Catégories 1 et 6** soumis à redevance en nature (débarquement d'une proportion des captures sans paiement):
 - 2 % du total des prises accessoires pour catégorie 1 ; 2 % du total des captures pour catégorie 6 ;
 - Redevances en nature remises à **SNDP** pour distribution et vente sur le marché national.
- Toutes catégories sauf thoniers soumise à obligation de débarquement à quai ou transbordement dans la rade d'un port mauritanien
- Opérations de déchargement principalement effectuées à Nouadhibou
 - Les bateaux **congélateurs** (catégories 1 et 2a) débarquent à quai au PAN, dans conteneurs à quai
 - Les navires de pêche **fraîche** (catégories 2 et 3) déchargent à quai au PAN, directement dans des camions isothermes pour transport sous glace vers Espagne et Portugal en particulier.
 - La **catégorie 6** débarque au PAN ou transborde en rade
 - **Faiblesses des infrastructures et services portuaires** (longueur et tirant d'eau des quais insuffisants, disponibilité limitée de conteneurs).
- Les débarquements « redevance en nature » représente des **quantités limitées**: 2 % des prises accessoires = quantités négligeables; uniquement 5 grands chalutiers de catégorie 6 en moyenne (2 % des captures = 1 000 à 2 000 t. par an)



Transbordement de maquereau congelé (redevance en nature) destiné à la SNDP (navire russe, sous licence libre)



Le quai de pêche du PAN - Nouadhibou



- L'APPD prévoit que « la Mauritanie adopte un plan de gestion durable des pêcheries de **petits pélagiques** » pour réduire l'effort de pêche dans la zone côtière et exclure la majeure partie de l'aire de répartition de la sardinelle ronde.
- **Le Plan adopté est de cinq ans et a été formalisé (Arrêté de fin 2022).**
- **Peu probable que les quantités de poisson débarquées en Mauritanie par l'UE et distribuées sur le marché local augmentent de manière significative; Pelagic Freezer Trawler Association – PFA (18 navires) intéressée à retourner en Mauritanie, mais n'a pas encore décidé de le faire.**

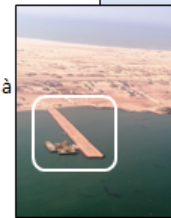
Emplois

- Environ **400 marins mauritaniens** à bord des navires de l'UE, en grande partie :
 - thoniers senneurs, une personne par navire;
 - thoniers canneurs, trois personnes par navire;
 - crevettiers et navires démersaux, 60% de l'équipage,
 - pour les chalutiers pélagiques, 60% du personnel de production
- Les marins doivent être titulaires du certificat de **base de sécurité** internationalement reconnu pour être embarqués.
- **Pas de problème majeur en termes de recrutement pour les navires UE (mais la Mauritanie n'est pas sur la « Liste Blanche » de l'OMI).**
- Processus pour la réinscription de la Mauritanie sur la « Liste Blanche » actuellement en cours.

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B – Appui sectoriel

- L'appui sectoriel pour la promotion d'une pêche responsable et durable comprend huit domaines d'intervention.
- **Tous les domaines appuyés** depuis 2008.
- Au cours des périodes 2015-2019 et 2019-2020 (20,63 Mio EUR), la construction du port de **Tanit** (41 % du total), de la **GCM** (25 %), de l'**IMROP** (13 %), de la **préservation** l'environnement marin et côtier (13 %) et de l'**ACNAV** (5 %) ont été appuyés plus spécifiquement.
- Protocole 2021-2026: Il est prévu notamment le co-financement de l'ouvrage maritime du « **PK 93** » (6 Mio EUR) et un co-financement (2,5 Mio EUR) avec la KfW pour la construction du **COS GCM/IMROP** à Nouadhibou.
- **Programmation 2021-2026 en préparation, à acter à la prochaine Commission Mixte.**



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- **Retards importants dans la mise en œuvre de l'appui sectoriel des Accords précédents, d'où retard dans la programmation de l'appui sectoriel de l'APPD /Protocole actuel.**
- **Cellule de Suivi et de Coordination de l'Appui Budgétaire Sectoriel mise en place et opérationnelle (formalités de nomination des membres en cours).**
- La mission a identifié des domaines d'intervention pour répondre à certains besoins mentionnés dans la L2P - 2022-2024, dont gestion des déchets des navires de pêche.
- **Les parties prenantes nationales du secteur artisanal peu impliquées / consultées pour l'ensemble du processus.**

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C – Appui des PTF

- **Large éventail d'interventions, avec les principales entités liées à la pêche en Mauritanie et selon les 8 axes prioritaires du Protocole**
- **Banque Mondiale** : PRAO (achevé) et valorisation des produits de la pêche avec AZFN. Pas de projets pêche actuellement en cours d'instruction.
- **KfW** active historiquement (surveillance des pêches). **4 projets** en cours ou sur le point de démarrer (**55,5 Mio EUR**) : i) "Renforcement des capacités de la GCM - Phase V", ii) Modernisation de l'EPBR, iii) Renforcement des capacités de la GCM et de l'IMROP et iv) « Promotion des chaînes de valeur des petits pélagiques destinés à la consommation humaine ».
- **L'UE** (avec le fonds SEWOH allemand) finance le projet **Promopêche** (27,2 Mio EUR) en voie d'achèvement. Projet d'économie bleue en cours d'instruction.
- **JICA** a **trois** projets en cours (**68 Mio EUR** : i) renforcement des capacités de l'ONISPA, ii) renforcement des capacités du CQFMP et iii) renforcement des capacités de l'IMROP.
- Autres: **FADES** (amélioration du Port de Tanit), Marché au Poisson de Nouakchott



D – Sécurité alimentaire

- L'industrie minotière (farine et huiles de poissons) absorbe la **majeure partie** des débarquements de petits pélagiques. Développement encouragé à partir de la deuxième moitié des années 2000.
- Produits essentiellement destinés à l'**aquaculture**, exclusivement exportés vers Asie (Chine et Vietnam) puis Europe (UE, Russie, Ukraine); Turquie récemment.
- Exportations via SMCP (en moyenne annuelle, 2018-2021):
 - 298 120 t - dont 143 860 t de farines et huiles (= 550 - 600 000 t/an poids frais)
 - 634,6 millions USD
 - farine et huiles (48% en volume, 28% en valeur), pélagiques congelés (24% en volume, 7% en valeur), céphalopodes congelés (13% en volume, 58% en valeur), et autres - démersaux et crustacés, mollusques non compris (14% en volume, 8% en valeur).



D – Sécurité alimentaire (suite)

- La problématique « **Plus de pélagiques destinés à la consommation humaine/moins de pélagiques destinés à la farine** » élément fort de la Stratégie sectorielle (diminuer de 80 % la quantité de pélagiques destinés à la farine d'ici 2024).
- **Plusieurs circulaires** adoptées par le MPEM depuis 2016: autorisation de quota annuel limité à 10 000 puis 4 000 tonnes de produits frais; les senneurs doivent débarquer 20% de leurs captures sur le marché local pour la consommation humaine etc.
- Les usines opèrent **mutation** vers développement de produits autres que farine, avec fort potentiel de développement.
- La farine reste le créneau **le plus rentable** pour les petits pélagiques (pas d'exigence qualité du poisson, installations pas coûteuses et peu de main d'œuvre; marché très porteur).
- **Difficultés liées notamment à la réticence des usiniers à appliquer les mesures prises par le MPEM, à la qualité des produits débarqués et aux capacités de congélation et de stockage actuels des usines.**

D – Sécurité alimentaire (fin)

- Émergence d'une **nouvelle génération** de bateaux répondant aux exigences sociales (« mauritanisation » des équipages) et économiques (produits de qualité) du pays. La **qualité** des captures de la plupart de ces navires est déjà suffisante pour répondre aux normes de sécurité pour la consommation humaine nationale et l'exportation.
- L'option « plus de poisson pour la consommation humaine » repose d'avantage sur un accroissement des exportations vers les **marchés régionaux** que sur une augmentation de la consommation nationale.
- D'après la L2P 2022-2024, l'ensemble des actions visant à accélérer la transition vers « moins de farines et plus de produits pélagiques destinés à la consommation humaine » devaient être précisées et organisées dans le cadre d'un **plan spécifique** défini au début de la mise en œuvre de cette L2P.
- **Perspectives:** continuation/meilleure application de la L2P.



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3 – Questions à aborder dans le cadre du présent Atelier:

1. Comment accroître les avantages et quelles devraient être les priorités de l'appui sectoriel de l'APPD, en particulier en ce qui concerne le sous-secteur de la **pêche artisanale**?
2. Comment améliorer la **sécurité alimentaire** grâce à l'augmentation des captures destinées à la consommation humaine dans le pays et dans la région, et comment l'APPD peut-il y contribuer ?
3. Comment l'APPD peut-il être mis à profit pour offrir d'avantage **d'emplois** et améliorer l'implication des **jeunes et des femmes** dans le secteur de la pêche ?
4. Comment l'APPD peut-il servir à améliorer la **participation et l'inclusion** des parties prenantes et des représentants de la pêche artisanale dans les processus de décision qui concernent leurs moyens de subsistance ?
5. Comment faire en sorte que les activités complémentaires des **PTF** puissent contribuer à maximiser les avantages des APPD pour la Mauritanie ?



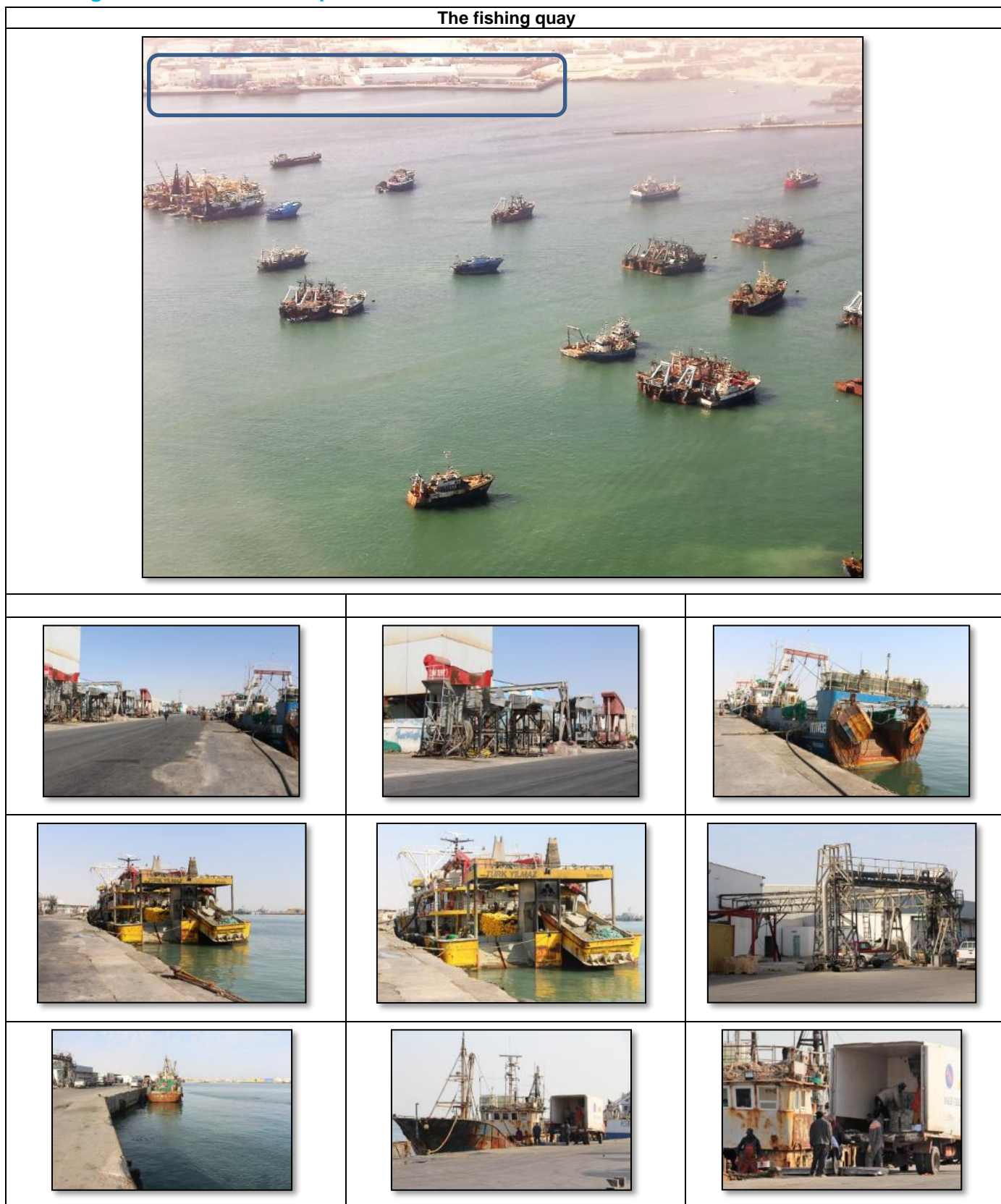
Merci!

POSEIDON

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Annex 2: Illustrations on port infrastructure and related activities

Figure 5: Illustrations of port infrastructure in the PAN



The commercial quay (under repair)



The extension of the PAN



Figure 6: Illustrations of other infrastructure and facilities in Nouadhibou












		
<p>3M Seafood cannery nearing completion</p>	<p>The GCM pier (on stilts), under construction with KfW funding (the cold storage facilities of SNDP are visible beyond its root)</p>	
		
<p>Poly Hong Dong facilities (Chinese fishing company)</p>	<p>Facilities of the Mauritania Seafood factory (in the background, in yellow, the Chantier Naval de Mauritanie)</p>	<p>Entrance to the EPBR</p>
		
<p>GCM facilities and equipment</p>		

Figure 7: Illustrations of various types of fishing vessels in Nouadhibou

	
<p>Artisanal fleet for octopus fishing with pots (currently under biological closed season)</p>	



Turkish pelagic purse seiners



Chinese trawlers



Chinese inshore fishing boats

Figure 8: Illustrations of transshipment by a Russian pelagic trawler



On the left, the reefer cargo ship, on the right the trawler

Transshipment of cartons of frozen mackerel, corresponding to the 3% fee in kind to SNDP (non-EU foreign vessel /Russian, under free licence)



NOTE DE PECHE

No	Species	Canton		Total, kg
		Weight, kg	Quantity	
1	Aluare maculosa L.	30	2125	63750
2	Aluare maculosa M.	30	1818	54540
3	Aluare maculosa S	30	7371	221130
4	Machena L.	30	2058	61740
5	Aluare M.	30	18785	563550
6	Sardine de Aurito S	30	1159	34770
7	Sardine de Aurito S	30	581	17430
8	Sardine S	30	2664	79920
9	Sard Broem	27	372	10944
10	Broctex	27	428	11556
11	Green Gaint	27	128	3456
12	Scunner	27	250	6750
13	Lichu	27	3451	93177
14	Butter Fish	27	59	1593
15	Bonca	24	1908	45792
16	Alu. Mix A Tuna	30	73	2190
17	Alu. Mix Y Bonito	27	2917	78759
18	Blue Fin	27	190	5130
		TOTAL	56228	1472284

16.11.2022 A. RotuNyuk

Table with multiple columns and rows, likely a detailed log or inventory. The columns include various categories and numerical values. The text is partially obscured but appears to be a structured data table.

République Islamique de Mauritanie
 Ministère des Pêches et de l'Économie Maritime
 وزارة الصيد والاقتصاد البحري

رخصة صيد
LICENCE DE PECHE
 في المنطقة الاقتصادية الخاصة للجمهورية الإسلامية الموريتانية
 Dans la Zone Economique Excluse de la République Islamique de Mauritanie

NOM DU NAVIRE: [Redacted] اسم السفينة
 CATEGORIE DE PECHE: Pelagique libre فئة الصيد
 DATE DE VALIDITE: 30/08/2022 إلى 29/11/2022 التاريخ الصلاحية
 IDENTIFICATION DU NAVIRE - تعريف السفينة
 NOM DE L'ARMATEUR: [Redacted] المورع صاحب السفينة
 NOM DE L'AFFRETEUR: [Redacted] اسم المصايد
 CONSIGNATAIRE: [Redacted] المورع اليه
 PORT D'ATTACHE ET IMMATRICULATION: VLADIVOSTOK 833459 ميناء الارتباط ورقم القيد
 NATIONALITE DU NAVIRE: RUSSE جنسية السفينة
 IDENTIFICATIF RADIO: U J C رقم الإرسال اللاسلكي
 NATURE DE LA COQUE: Acier هيكل السفينة
 DATE ET LIEU DE CONSTRUCTION: 01/01/1984 تاريخ ومكان البناء

CARACTERISTIQUES TECHNIQUES DU NAVIRE - المواصفات التقنية للسفينة
 PUISSANCE MOTEUR PRINCIPAL: 4500 قوة المحرك الرئيسي
 LOGUEUR HT: 87.98 العرض LARGUEUR: 15 زحف القارب
 BALISE N°: Code IMO: 8314299
 JAUGE BRUT: GT: 3174 السعة الإجمالية
 JAUGE NET: 1161 السعة
 CAPACITE DES CALES: 2200 سعة الخزانات
 TRAITEMENT ET CONSERVATION À BORD: Congélation التجميد والحفظ طهر الثمن
 ENGIN(S) AUTORISE(S): CHALUT المصايد المسموح بها MAILLAGE (S) AUTORISE (S)

CONDITIONS D'EXPLOITATION - منطقتات الاستغلال
 TYPE D'EXPLOITATION: Libre نوع الاستغلال
 MAILLAGE AUTORISE: 40 mm فواصل عين الشباك
 EQUIPAGE: MAURITANIEN (S) 36 الأجنبي ETRANGER 30 الموريتاني
 ZONE DE PECHE AUTORISEE: Conformément à l'accord RIM-UE منطقة الصيد المسموح بها
 REFERENCE DE PAIEMENT: 2022T00217026107 رقم وتاريخ سند البيع
 AUTRES A PRECISER: ملاحظات أخرى

Numéro licence: 2022-161771
 Fait à Nouakchott: 25/08/2022
LIBRE HAUTURIERE

LE MINISTRE DES PECHEES ET DE L'ECONOMIE MARITIME
 Mohamed Abidine Mayif
 Le Ministre
 MINISTERE DES PECHEES ET DE L'ECONOMIE MARITIME

Annex 3: Illustrations on main fish value chains in Mauritania⁷⁵

The Tcherka – A major artisanal fishing landing site in Nouadhibou



200 to 300 artisanal fishing boats unload in this area, where the overall conditions are extremely precarious. No improvement plan is foreseen for this important area



⁷⁵ All pictures were taken by the consultant (some pictures were taken in 2021 during previous missions to Mauritania)



Small-scale processing for high-value products, for export to the EU

Small pelagics processing for fishmeal



Machinery of a fishmeal factory in Nouadhibou



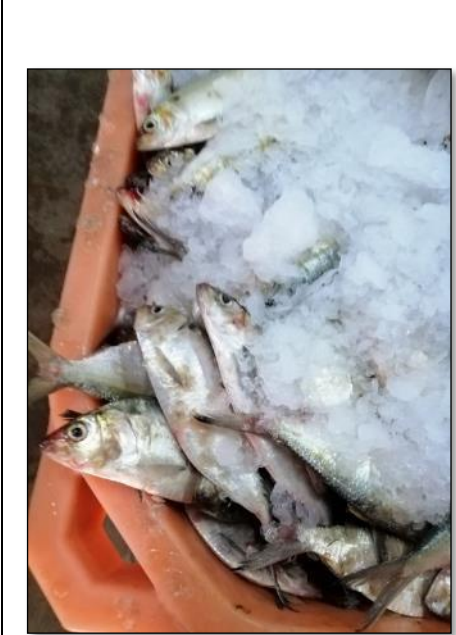
Small pelagics processing for human consumption in Nouadhibou



Supply of small pelagics to a processing plant



The freezing/packaging process in the plant





Products are exported to regional African markets and east-European markets

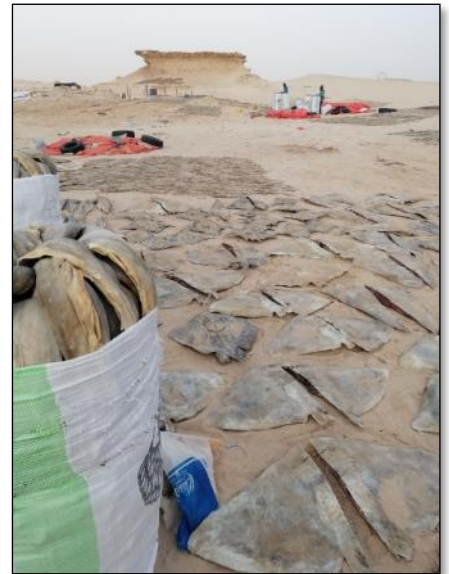
Small pelagics for human consumption: a fish cannery in Nouadhibou



The newly-built 3M Seafood cannery in Nouadhibou, aiming at processing sardine (daily production capacity of 100 tons of raw material)



Artisanal fish drying for regional African markets



Area north of Nouadhibou, mainly dedicated to drying of small-shark ('tollo') and rays by regional African fish processors (Nigeria and Ghana)



Fresh fish for local and neighboring countries markets



Preparation of transport of semi-pelagic fish under ice, from Nouadhibou to Nouakchott, and eventually Mali



Export of high-value products to the EU





The fish is put under ice and is transported by isothermal trucks to Spain, in a 3-day trip

Infrastructures - The port of Tanit

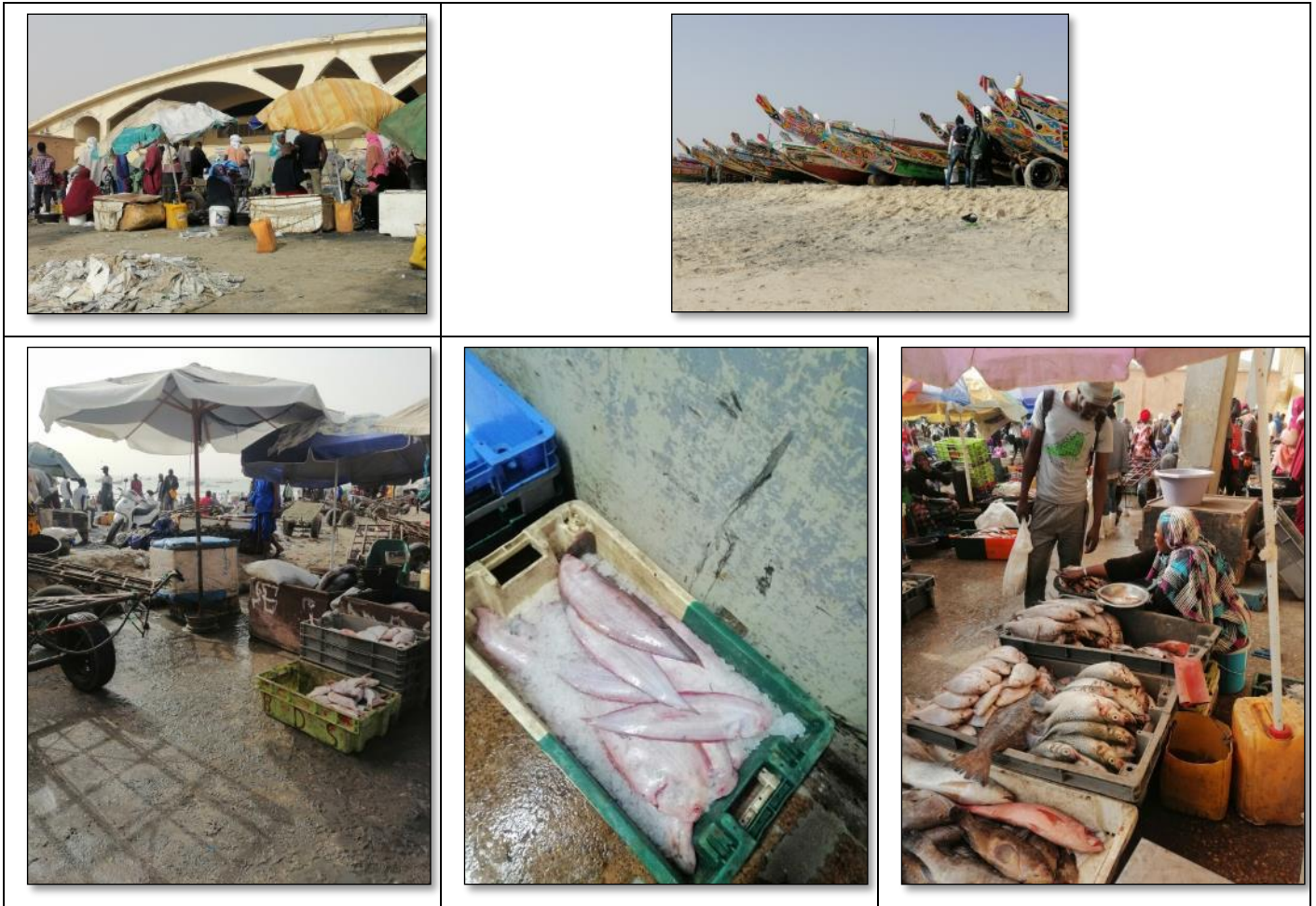


The port of Tanit, north of Nouakchott, where 'Senegalese' canoes and industrial vessels unload small pelagics. Its construction was co-financed by the SFPA Sectoral support. The port still needs further facilities, foreseen under funding by FADES

Infrastructures - Nouakchott Fish Market (MPN)

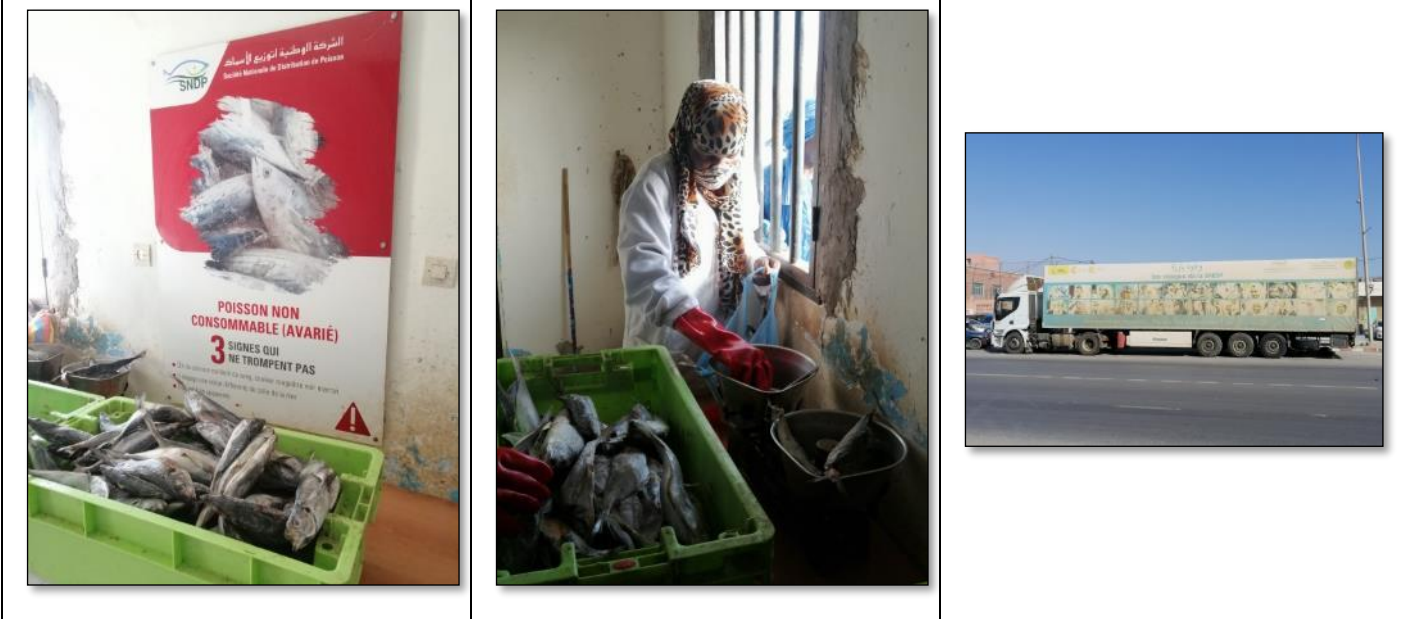


The Nouakchott fish market is under major rehabilitation/expansion, under WB, FADES and BCI funding



Distribution of small pelagics to the local population by SNDP







Windrush, Warborne Lane
Portmore, Lymington
Hampshire SO41 5RJ
United Kingdom

Telephone: +44 1590 610168
graeme@consult-poseidon.com
<http://www.consult-poseidon.com>

Potentials of EU Sustainable Fisheries Partnership Agreements and development cooperation for the sustainable development of local fisheries sectors



Photo: Port of Antsiranana (Diego) - Source: APMF's [website](#), extracted on 04.08.2023

Madagascar case study report

Assignment for the German Federal Ministry
for Economic Cooperation and Development
(BMZ)

DECEMBER 2023

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Acronyms

AC	Advisory Committee
AFD	French Development Agency (French abbreviation)
AMPA	Malagasy Fisheries and Aquaculture Agency (French abbreviation used in Madagascar)
APDRA	<i>Association-Pisciculture et Développement Rural en Afrique</i>
APIOA	Association of Indian Ocean Ports (French abbreviation)
APMF	Maritime and Inland Port Agency (French abbreviation used in Madagascar)
ASH	Fisheries Health Authority (French abbreviation used in Madagascar)
AU - IBAR	African Union-Interafrican Bureau for Animal Resources
BMZ	German Federal Ministry for Economic Cooperation and Development (<i>Bundesministerium für wirtschaftliche Zusammenarbeit und Entwicklung</i>)
CC	Advisory Committee in French (Comité consultatif)
CFTPS	<i>Centre de Formation Technique et Professionnelle SECREN</i>
CI	Conservation International
CITES	Convention on International Trade in Endangered Species of Wild Fauna and Flora
CNOI	<i>Chantier Naval de l'océan Indien</i>
comm.	Communication (verbal)
CSP	Fisheries Monitoring Centre (French abbreviation used in Madagascar)
CTOI	Indian Ocean Tuna Commission (French acronym), in English IOTC
CU	French abbreviation for <i>commune urbaine</i> - urban municipality
DESP	Directorate of Studies, Statistics and Planning (French abbreviation used in Madagascar)
DGPA	Director General of Fisheries and Aquaculture, MPEB (French abbreviation used in Madagascar)
e.g.	Latin meaning 'for example'
EEZ	Exclusive Economic Zone
EPA	Public administrative institution (French abbreviation)
EPIC	Public Industrial and Commercial Establishment (French abbreviation)
EU	European Union
EUD	EU Delegation
FAD	Fish aggregating Device (abbreviation in French: DCP)
FAO	United Nations Agency - Food and Agriculture Organization
FiTI	Fisheries Transparency Initiative
FOFIFA	<i>Centre National de la Recherche Appliquée au Développement Rural</i> – FOFIFA in Malagasy language
FPA	Fisheries Partnership Agreement
FPAOI	Federation of artisanal fishers in the Indian Ocean
HP	Horsepower
i.e.	Latin meaning 'that is'
ILO	International Labour Organisation
inc.	including
INSTAT	National Institute of Statistics, Madagascar
IOC	Indian Ocean Commission
IORA	Indian Ocean Rim Association
LDC	Least developed countries (PMA: French abbreviation)
LL	longliner
Mio	million
MPEB	Ministry of Fisheries and the Blue Economy (French abbreviation used in Madagascar)
NTFMS	National Tuna Fishery Management Strategy

OEPA	Economic Observatory for Fisheries and Aquaculture (French abbreviation used in Madagascar)
OIF	International Organisation of the Francophonie (French abbreviation)
PADM	GIZ-funded Sustainable Aquaculture Project in Madagascar (French abbreviation used in Madagascar)
PISPPA	<i>Poste d'Inspection Sanitaire des Produits de la Pêche et de l'Aquaculture</i> (Health Inspection Post for Fishery and Aquaculture Products)
PSMA	Port State Measures Agreement
PTF / TFP	Technical and financial partner (French abbreviation used in Madagascar: PTF)
PTP	Third country partners (French abbreviation used in Madagascar)
RENAFEP	National Network of Women in Fishing (RENAFEP in Madagascar - unless otherwise stated) (French abbreviation used in Madagascar)
RFMO	Regional Fisheries Management Organisation (ORGP in French)
RFO	Regional fisheries organisation
SANSAFA	Southern African Non-State Actors platform in Fisheries and Aquaculture
SECREN	<i>Société d'études, de construction et de réparation navales</i>
SFPA	Sustainable Fisheries Partnership Agreement
SMART	Specific, measurable, achievable, relevant and time-bound
SWIOP	Sustainable Western Indian Ocean Programme
TAC	Total allowable catch
TFP	Technical and financial partner
UNCLOS	United Nations Convention on the Law of the Sea
USAID	US Cooperation Agency
USTA	Tuna Statistical Unit of Antsiranana (French abbreviation used in Madagascar)
v.	versions

Note: 'Sectoral Support', with capital letters, means the Sectoral Support funded by the Protocols to the SFPA/FPA

1. Introduction

1.1 Objectives of the assignment and mission schedule in Madagascar

This report was prepared by Poseidon Aquatic Resource Management Limited, as part of a project to examine the "Potential of EU Sustainable Fisheries Partnership Agreements¹ (SFPAs) and Development Cooperation for the Sustainable Development of Local Fisheries Sectors", hereafter referred to as the "Research Study" or "the Project". The Project was funded by the German Federal Ministry for Economic Cooperation and Development (BMZ).

The Project addressed all SFPAs between the European Union and Third Partner Countries (TPCs) in Africa. The main areas of interest of the Project were:

1. How to ensure increased levels of benefits from EU fleet activities in African countries, in terms of fish landings and employment, and contributions to food security and national socio-economic benefits?
2. How to design and implement the Sectoral Support component of SFPAs most effectively, in particular to support small-scale fisheries, gender equity and food security?
3. How to ensure that complementary activities by donors/development partners can contribute to maximising the benefits of the SFPAs?

The inception phase of the Project was carried out from January to April 2022 and resulted in the preparation of an inception report and the first meeting of the Project Advisory Committee (PAC). A literature review and targeted consultation (through remote consultations) were then carried out from May to October 2022 and documented in the first Project Progress Report. The second meeting of the Advisory Committee at the end of October 2022, and subsequent discussions, resulted in **Madagascar** being selected as one of **four countries** for a specific case study.

Three field missions were completed to Madagascar as follows:²

- 1 to 16 February 2023. The main objective of the first mission was to introduce the project to stakeholders and identify a local consultant, to map stakeholders and the policy, legislative and development cooperation environment, and to plan for the two future missions.
- 1 to 9 May 2023. The main objective of the second mission was to continue to consult and work with some stakeholders in Antananarivo and meet key stakeholders in Antsiranana, where some of the EU tuna fishing vessels land part of their catches from the Western Indian Ocean sea basin, to discuss and explore the main research questions.
- 25 July to 2 August 2023. The main objective of the third mission was to further discuss and explore the main research questions with stakeholders, and to hold two workshops to validate the research's findings, conclusions and recommendations. Participants attending the workshops are listed in Annex 1.

This report is not a formal contractual deliverable,³ but it details the findings, conclusions and recommendations from the three missions to Madagascar. **The purpose of this report** is to provide the basis for the short Madagascar country case study included in the final project report.

² All missions conducted by Vincent Defaux, with missions 2 and 3 supported by the local consultant, Mr Tantely Andriamaharo Ny Aina, specialised in small-scale fisheries management, and development.

³ The four contractual deliverables are: inception report, first progress report, second progress report, final project report.

1.2 Madagascar - general information

Madagascar is on the UN [list of Least Developed Countries \(LDCs\)](#). LDCs benefit from special measures for their development from UN agencies and major technical and financial partners, such as the EU and its Member States. Madagascar is one the poorest countries in the world with three-quarter of its population living under poverty (National Institute of Statistics - INSTAT and ICF, 2022)

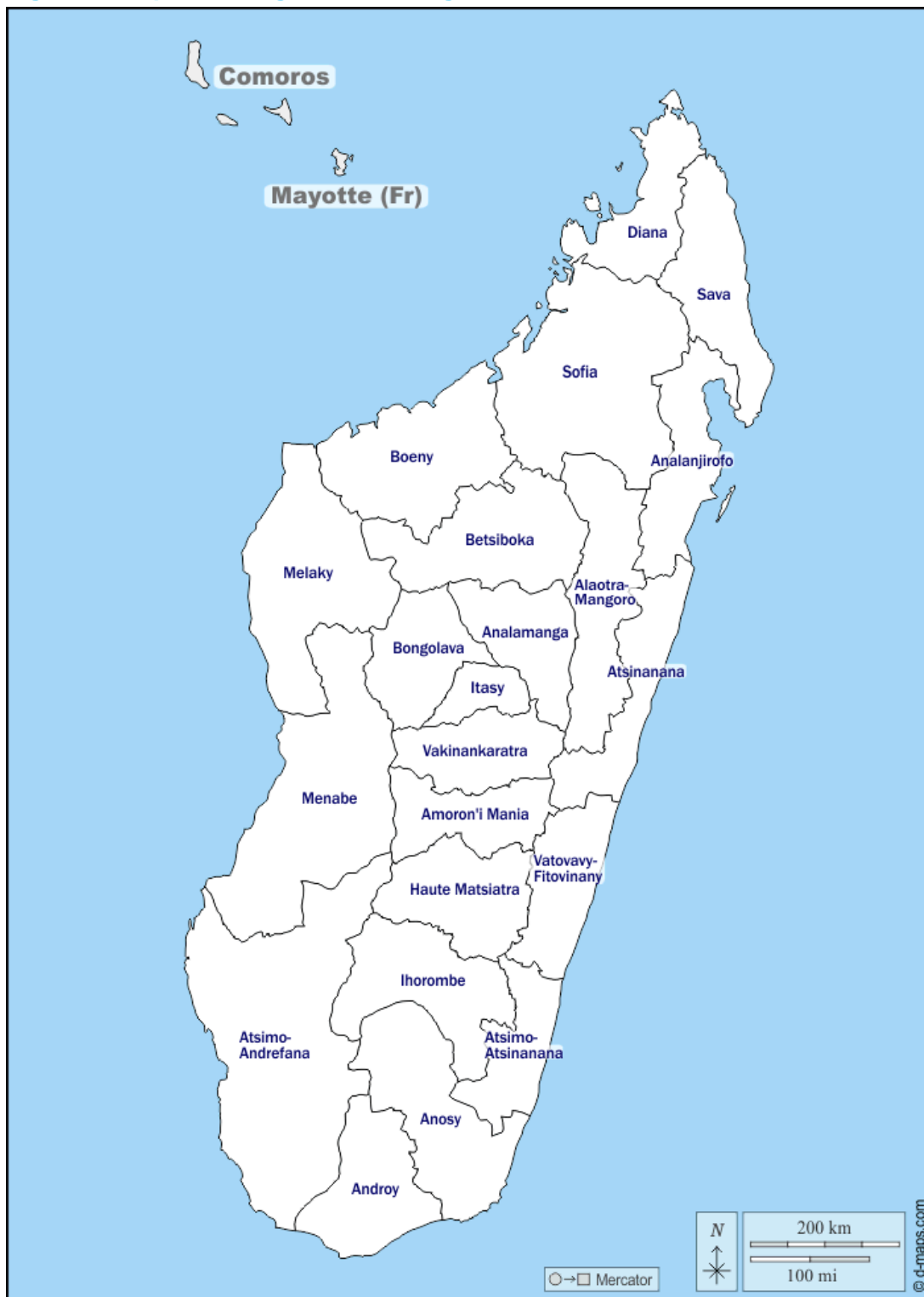
Figure 1: Map of Madagascar



Source: [United Nations](#) NB: Antsiranana, located in the extreme north of Madagascar

The capital of Madagascar is Antananarivo. The first mission of the international consultant took place in the capital only. The port of Antsiranana (old name: Diego-Suarez - "Diego" used in the text below as well), mentioned regularly in this report, is located in the Diana region in the north. The second and third missions of the international consultant took place in these two towns.

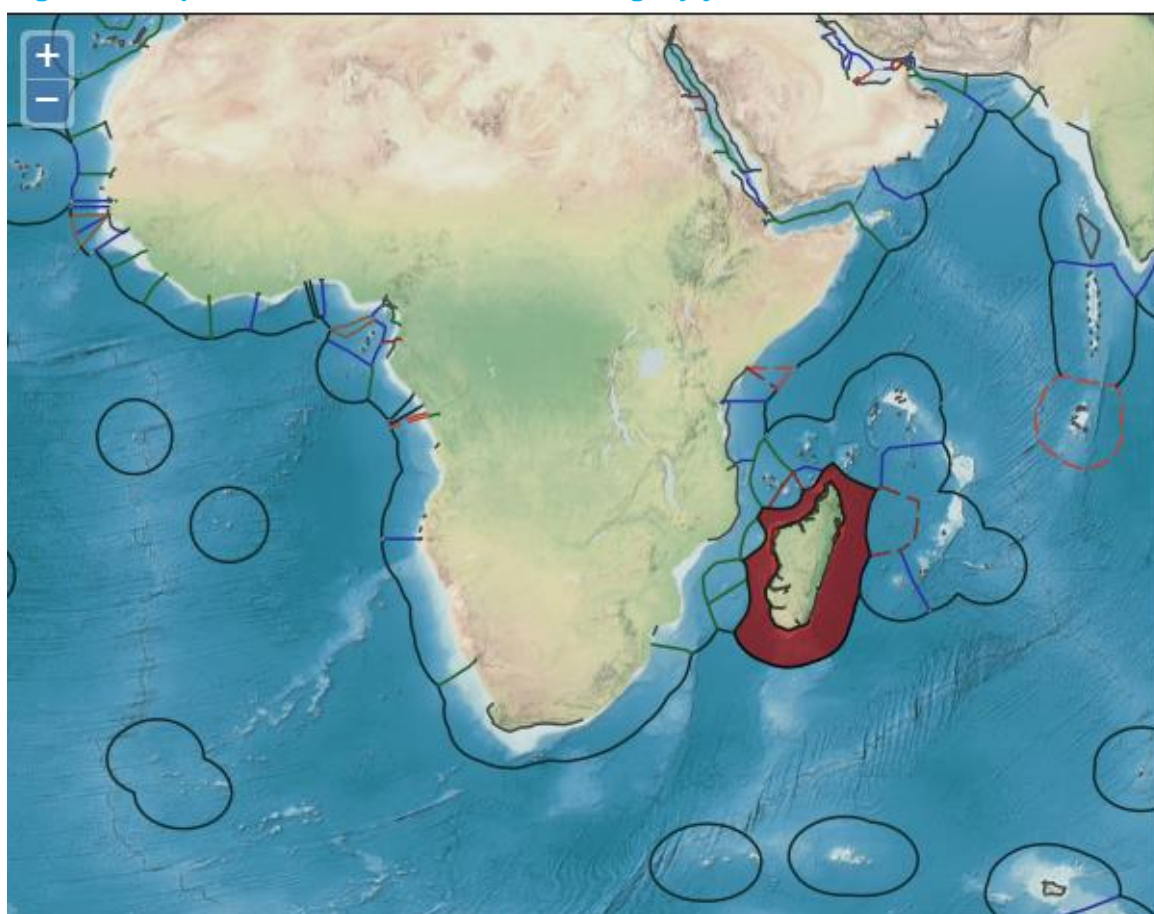
Figure 2: Map of the regions of Madagascar



Source: [D-Maps.com](https://d-maps.com)

Madagascar's Exclusive Economic Zone (EEZ) is bounded to the east and west by waters under **French** jurisdiction (i.e. Mayotte, the French Southern and Antarctic Lands - TAAF and La Réunion). To the north, the Malagasy EEZ⁴ ends at the southern limits of that of the **Seychelles** archipelago. To the south and south-east, the waters under Malagasy jurisdiction extend up to 200 nautical miles from Malagasy baselines, which is the EEZ limit authorised by the United Nations Convention on the Law of the Sea (UNCLOS), in force since 1994 and that Madagascar ratified in 2001 (UN dedicated [web page](#) on the UNCLOS – table of ratifications / accessions). Waters under Malagasy jurisdiction are coloured on the map below in red. Madagascar and some neighbouring countries / territories such as territories belonging to France have not yet agreed on all the coordinates of joint maritime boundaries. Thus, the term Exclusive Economic Zone (EEZ) of Madagascar is not used in the recent legal texts of the EU fisheries agreements with Madagascar but rather "fishing zone" to which EU vessels have access. The coordinates of the fishing zone in the forthcoming SFPA Protocol are close to the possible future boundaries of the Malagasy EEZ but do not represent its boundaries.⁵

Figure 3: Map of maritime waters under Malagasy jurisdiction



Legend: zone coloured in red, maritime waters under Malagasy jurisdiction

Source: Maritime Institute of Flanders (2023): MarineRegions.org. Available online at www.marineregions.org
Accessed on 2023-03-05

⁴ An EEZ does not include territorial waters (UNCLOS) (see . Madagascar declared its territorial seas up to 12 nautical miles from the baseline in 1985 (Ordinance No. 85-013).

⁵ For more details, see the [dedicated page](#) of the Marineregions.org website and section 2.1 of the evaluation of the 2015 - 2018 Protocol to the EU-Madagascar Fisheries Agreement carried out in 2018). See also the UN dedicated page on Maritime limits for Madagascar by clicking [here](#) .

2. Overview of the SFPA and Protocol

2.1 Introduction

The SFPA implementing protocol is expected to last 4 years (2023 – 2027) from the date of its **provisional application, which was 1 July 2023**. The SFPA and its implementing Protocol were initialled in October 2022 then signed on 30 June (EC [Press release](#), 30 June 2023). The SFPA is managed and monitored by a **Joint Committee** representing Madagascar and the EU. The EU is represented by the European Commission, by staff from the Directorate General of Maritime Affairs (DG MARE unit B3).

The full terms of the SFPA and its implementing Protocol were made available to the public as final⁶ versions on 19 June 2023 - please **click [here](#) to access the SFPA and the 2023 – 2027 Protocol**.

2.2 General information

The fisheries agreements between the EU and Madagascar have for at least a decade been so-called “tuna agreements” allowing access for EU fishing vessels targeting highly migratory species such as tuna and associated species.

The last protocol expired on 31 December 2018. **From the 1st of January 2019 to the 30th of June 2023, the fisheries agreement was “dormant” and EU vessels could not therefore access Malagasy waters until a new protocol entered into provisional application or force**, in accordance with the “exclusivity” [of access] clause within the previous 2007 EU fisheries agreement (i.e. there is no possibility to obtain direct authorisations).

2.3 Access component and economic cooperation between EU vessels and Malagasy stakeholders

The forthcoming Protocol allows access to 65 EU vessels under three fishing categories:

- 32 tuna purse seiners;
- 13 surface longliners over 100 GT; and
- 20 surface longliners of 100 GT or less. These small surface longliners are all French vessels based in La Réunion.

In total, a maximum of 65 EU vessels are thus eligible to fish in Malagasy waters using this Protocol. This is broadly in line with the number of active and authorised vessels fishing in Indian Ocean waters. From the 1st of July 2023, the EU tuna fleet is authorised to catch each year 14 000 tonnes of tuna and tuna-like fish (marlin, swordfish) in return for a fee from the shipping companies of EUR 85 per tonne and an annual financial contribution from the European Union of EUR 1.8 million including an annual financial compensation of EUR 700 000 of access rights for the EU fleet to be authorised to catch 14 000 t of fish and a separate amount for the Sectoral Support (EUR 1.1 Mio per year).⁷

The amounts of the EU financial compensation, linked to the access rights, are transferred to a Public Treasury Account. Its use is under the discretion of Madagascar. A specific bank account is reserved for the Sectoral Support under the supervision of the Ministry responsible for fisheries.

⁶ First online versions were ‘Proposals’ on the EUR-LEX website, the EU law portal, on 28 April 2023 – please click [here](#) to access these Proposals

⁷ Entered into provisional application on 1st July 2023, the tuna fishing season in Madagascar was almost over for the year 2023 - the main fishing season being in the first semester each year. Note that landings continue to occur in Antsiranana by vessels fishing in other EEZs, outside the tuna fishing season in Madagascar.

This “14 000 t” of catch is a **reference tonnage** and not a limit per se for the targeted fish are highly migratory species that need international management with fishing and coastal States. This is carried out through the **Indian Ocean Tuna Commission (IOTC)**.

There is **no obligation to land catches in Madagascar** within the SFPA and its 2023 – 2027 Protocol (a common approach applied to EU tuna fishing agreements in general).

EU vessel operators are also bound to pay a ‘specific contribution for environmental management and ecosystem protection’ of EUR 2.50 / GT per year (estimated in the Protocol in total per year: EUR 200 000).

2.4 Sectoral support component

2.4.1 Expected areas of intervention

The protocol's Sectoral Support to the SFPA provides for actions in the **implementation of the national development policy (or policies) for fisheries and the blue economy**. The annual amount of Sectoral Support is EUR 1.1 million. The objective is to contribute to a "responsible and sustainable" development of the fisheries sector. The expected areas of intervention agreed upon by both parties are:⁸

- The implementation of the national tuna fisheries management strategy;
- Support for small-scale and traditional fishing;
- Training of fishers;
- Strengthening fisheries research, capacity to manage marine ecosystems and fishery resources;
- Monitoring, control and surveillance of fishing activities and in particular the fight against illegal, unreported and unregulated fishing; and
- The safety of fishery products.

2.4.2 Status of preparation of the multi-annual programming matrix by both parties, provisional content, and integration of the "BMZ research study" on SFPAs

The programming matrix was developed by the Ministry of Fisheries and the Blue Economy (MPEB) under coordination by the Malagasy Fisheries and Aquaculture Agency (AMPA) during the first semester 2023. The European Commission (DG MARE B3) staff, on behalf of the EU and with the support of the EUD, collaborated with MPEB to draft it through electronic communications, phone calls, and at least two missions of its dedicated staff to Madagascar.

The Poseidon international and national consultants were able to interact with the staff of the EU Delegation and the EC to contribute to this process according to the expectations/objectives of BMZ, MPEB and the EC. In May 2023 (mission 2), Poseidon staff reviewed the matrix and provided guidance to AMPA in preparing a **document presenting the Sectoral Support programme in full compliance with the terms of the Protocol**. To do so, they proposed outlines of the document in line with the **article 8 of the Protocol** (see Annex 4).

Some axes of intervention are not listed in the Protocol. The axes of intervention in the matrix are relevant to the MPEB's objectives to develop the fisheries and the blue economy sectors in Madagascar and both parties appear to have agreed in principle with these differences. For instance, activities to support the National Tuna Fisheries Management Strategy are included within the Sectoral Support Programme without having a distinct axis of intervention (see Table 1 below).

⁸ These lines of action are listed in this order in the Protocol.

Table 1: Sectoral support programme of the 2023 – 2027 Protocol - Axes of intervention and budget in EUR

Axis of intervention agreed by both parties	Link to the axis of intervention in the Protocol: ✓	Budget (in EUR) over 4 years	% over the total budget
1. Development of coastal and artisanal fishing	✓	1 044 225	20%
2. Aquaculture development	Indirect link through eligible blue economy activities	1 021 020	20%
3. Blue economy promotion: <i>Direction générale économie bleue</i>	Indirect link through eligible blue economy activities	464 100	9%
4. Fisheries research, and capacity building in marine ecosystem and fisheries resources management	✓	464 100	9%
5. Legal framework, audit and anti-corruption, communication campaign	Indirect link through eligible blue economy activities	162 435	3%
6. Safety and health monitoring of fishery products: ASH - <i>Autorité sanitaire halieutique</i>	✓	820 804	16%
7. Fisheries surveillance and the fight against IUU fishing: CSP - <i>Centre de surveillance des pêches</i>	✓	1 044 225	20%
8. Management and coordination of the Sectoral Support Programme	Relevant but justification needed	162 435	3%
9. Promotion of the seafarer profession in the fishing sector (APMF – <i>Agence portuaire, maritime et fluviale</i>)	✓	46 412	1%
Total		5 229 756*	100%

Source: Sectoral Support programming provided by MPEB - final version before signature of the SFPA – Protocol, signature on 30 June 2023.

Notes: * the total of the sectoral budget is above EUR 4,4 million. AMPA have included a devaluation rate estimate for the Ariary compared to the Euro in the years 2, 3, and 4. The allocation of the total SS budget to different interventions can evolve during the Protocol implementation by common approval between the two Parties during the Joint Committee meeting.

The content of the Sectoral Support programme includes support for small-scale fisheries in compliance with the terms of the Protocol on the Sectoral Support programme. The amount supporting the small-fisheries sector can be estimated to EUR 1.1 million over the 4-year duration of the Protocol. Thus, **a minimum of 20% of the overall EUR 5.2 million (see Table above) are allocated to small-scale fisheries development within the 2023 – 2027 Sectoral Support:**

- Under the Axis 1 in the Table 1, about EUR 866 000 are earmarked to develop the small-scale fisheries (SSF) sector by a pilot-action and the small-scale fish products supply chains;
- Some cross-cutting activities will also indirectly support the small-scale fisheries sector within the other axes of interventions, especially:

-
- Training fishers in cooperatives on safety at sea: slightly less than EUR 4 000 (axis 9).
 - Fisheries research (axis 4) - ~ EUR 268 000: around EUR 145 000 in improving data collection system in the upstream sector, about EUR 91 000 in improving small-scale tuna fishing data, and about EUR 32 000 in an experimental study on small-scale spiny lobster fishing.
 - Better governance improvement (axis 5),
 - Support for sanitary controls of fish products (axis 6), and fisheries monitoring, control and surveillance (MCS) (axis 7): specific amount earmarked for the SSF sector are not itemised.

3. Stakeholders

3.1 Introduction

Prior to the first mission to Madagascar, desk work identified many stakeholders of relevance to the SFPA and its Protocol. However, the stakeholder mapping was primarily for the purpose of the targeted consultation and was thus not fully comprehensive. In this section a more complete listing of stakeholders is presented.

The tables in this section follow the convention used in the inception report and first progress report of categorising stakeholders by whether they are:

- involved with implementing the SFPA/Protocol (governing authorities and DG MARE), Category 1;
- are directly affected by it (the private sector), Category 2; or
- have an interest in it (notably NGOs/civil society organisations, but also other Ministries in the PTC not involved with implementation such as enforcement agencies), Category 3.

3.2 National stakeholders in Madagascar

The Ministry in charge of maritime and continental fisheries and the blue economy in Madagascar is the **Ministry of Fisheries and the Blue Economy (MPEB, in French as *Ministère de la pêche et de l'économie bleue*)**, which is the authority responsible for coordinating, monitoring and implementing the SFPA. MPEB's Directorate General for Fisheries and Aquaculture (DGPA), in particular its Fisheries Directorate, will monitor and coordinate its implementation.

Organisations under the supervision of MPEB are in charge of:

- Management of Sectoral Support funds from the protocols to the EU fisheries agreements - **the Malagasy Fisheries and Aquaculture Agency (AMPA, in French the *Agence Malgache de la Pêche et de l'Aquaculture*)** - and therefore the current SFPA. AMPA is also in charge of distributing microcredits to small-scale fishermen and fish farmers;
- Fisheries monitoring - the Fisheries Monitoring Centre (FMC, in French the **CSP *Centre de surveillance des pêches***);
- Health controls on exports of fishery products - the **Fisheries Health Authority (ASH, in French the *Autorité sanitaire halieutique*)**.

The Fisheries Health Authority (ASH) and the CSP are public administrative establishments. The AMPA is a public establishment of an industrial or commercial nature.

In particular, ASH is seeking funding to implement health monitoring of fish products on the domestic market. This funding programme includes a study to better understand the value chains in the supply chain of the domestic market, including the so-called "false tuna/fish" chain) This provisional study to fund would include 15 sites, among which the territory of Antsiranana. These monitoring activities have not taken place since 2015. A funding proposal was submitted to an EU co-funded programme (RINDRA) around 2016 but has so far not been pushed through. The multi-annual RINDRA programme is an institutional support to the Ministries of Agriculture, Livestock, Fisheries and Environment (MAFFE) (details in section 3.5).

Other national entities of importance include the **Agence portuaire maritime et fluviale (APMF)** in charge of port management, training seafarers and involved in the validation of contracts for Malagasy seafarers deployed on fishing vessels, including those of the EU,

under the terms of the Protocol to the SFPA. APMF has regional branches, including one in Antsiranana.⁹

NGOs active in the fisheries sector are, among others, **WCS, Conservation International, WWF Madagascar, Blue Ventures, SOS villages**. SOS Villages is involved in a vocational training programme for vulnerable people to acquire fishing skills in a region in southern Madagascar. This intervention is financed by the French Development Agency (AFD).

Note that there are not many organisations representing the artisanal fisheries subsector in the small-scale fishing sector, that is the *pêche artisanale* subsector; the most important small-scale fisheries sub-sector in Madagascar being the *petite pêche* one – see section 5 for the definitions of these two sub-sectors).

The BMZ study showed also that there is a negative public and local stakeholders perception of, or at least a lack of knowledge of, the EU fisheries agreement – Protocol's terms and its implementation (in terms of access and Sectoral Support).

The multi-year SWIOFish2 programme funded by the World Bank ends in September 2023. This programme has funded the operational and investment - activities of various organisations under MPEB, including, but not limited to, the Fisheries Monitoring Centre and the Fisheries Health Authority. MPEB and the staff of these supervising authorities are concerned about the loss of these regular funds. **The 2023 - 2027 Protocol Sectoral Support fund to the SFPA will only partially "replace" the regular dedicated SWIOFish2 funds for MPEB and its parent bodies to operate and carry out investment activities.**

In order to be less dependent on donors, MPEB is looking for other sources of funding to ensure the operating and investment activities of these organisations (notably the ASH, the CSP and other organisations). Consideration is to be given to acquiring funds through non-tax revenues or other sustainable sources of financing:

- For the CSP: the CSP director proposed, as part of a complementary study carried out under the SWIOFISH2 programme to strengthen legal texts, and to deepen potential mechanisms for sustainable financing of the CSP (CSP, comm., 14.02.23);
- For the ASH: a Decree 2015-1309 has been in force since 2015 to include in the finance law of year "n" budgetary resources for the functioning of the ASH up to 1% of the value of exports of fisheries products of year "n-1" for the implementation of official controls of fisheries products by the ASH. Although this Decree has been promulgated, it is not applied. ASH head staff suggested that this Decree be enforced or at least be revised then enforced to find sustainable funding sources to run ASH (ASH, comm., 14.02.23 and analysis of Decree 2015-1309 of the Ministry of Fisheries and Fishery Resources);
- For AMPA, a Decree 2005 - 376, not applied either, should allow AMPA to obtain funds through access rights for foreign fishing vessels¹⁰ in addition to funds from TFPs, including the Sectoral support from the fisheries agreements with the EU. For the time being, there are no plans for the Malagasy government to return to such a financing mechanism, although this is one potential relevant sustainable source to fund the AMPA's activities (AMPA, comm., Feb. and May 2023).

Due to budgetary issues, four national MPEB institutions no longer exist since the beginning of 2022. These entities were, however, very useful in the regular collection and processing-analysis of data in the sector. They obtained funds from TFPs to carry out their activities and

⁹ A meeting of the international consultant with the APMF during Mission 1 served as an interface between MPEB and the APMF to consult on the development of specific activities related to the "training of fishermen" component of the Protocol's Sectoral Support to the SFPA.

¹⁰ EU and non-EU ones

studies, including EU funds from Sectoral Supports under the fisheries agreements with the EU.

Thus, the Economic Observatory for Fisheries and Aquaculture (OEPA in French), a reference in the sub-region, has been abolished, alike the Tuna Statistical Unit (USTA in French) in Antsiranana. The staff of these entities have been partly integrated into the Directorate of Studies, Statistics and Planning (DESP) created in March 2022 - the other national institutions having disappeared (cross interviews with Malagasy stakeholders during the February 2023 mission).

Another major issue raised by the staff of MPEB and its consulted entities is the government's desire to reform public institutions by reducing the use of contract staff. However, many public entities use (as in the case of the ASH) or used to use (as in the case of the former national public establishments under the supervision of MPEB) a high ratio of contract staff. If the reform passes, the recruitment or non-permanence of contractual staff is called into question. For example, the ASH currently works with 67 people, including 7 civil servants only (estimated data provided by ASH).

Finally, with regard to institutional issues, central and decentralised public institutions should not be impacted in their daily work when power cuts happen. These situations occurred on a regular basis when the international Consultant had his missions in the first semester 2023 and MPEB did not have power generator to ensure power supply during these cuts.

Table 2 below/overleaf provides a list of national stakeholders.

Table 2: National stakeholders in Madagascar

Organisation	Category / Type	Main role
MPEB	1 / PTC Government	Coordinating the SFPAs - Protocol
AMPA	1 / PTC Government	Financially designing and implementing the Sectoral Support
ASH, MPEB	1 / PTC Government	Public organisation in charge of food safety of fish products in Madagascar
CSP, MPEB	1 / PTC Government	Public organisation in charge of fisheries surveillance
APMF	1 / PTC Government	Agency in charge of managing some ports in Madagascar and controlling seamen contract
National Navy	3 / PTC Government	Navy involved in control at sea, in association with CSP for fisheries control and surveillance
WWF Madagascar	3 / PTC NGO	NGO working in the fisheries sector
Blue Ventures	3 / PTC NGO	NGO working in the fisheries sector
Conservation International	3 / PTC NGO	NGO working in the fisheries sector
WCS	3 / PTC NGO	NGO working in the fisheries sector
MIHARI	3 / PTC NGO	Network of Locally-Managed Marine Areas (LMMAs) in Madagascar
RENAFEP Madagascar	2 / PTC private sector	National network of women active in the fisheries sector

Source: own elaboration based on desk review and consultation in Madagascar

3.3 EU stakeholders

Table 3 overleaf shows the main EU stakeholders involved in the EU/Madagascar SFPA or the previous EU fisheries agreement.

Table 3: EU stakeholders of relevance to SFPA with Madagascar

Organisation	Category / Type	Main role
Unit B3 DG MARE, Brussels, Belgium and Mauritius	1 / EU	Responsible for contracting the ex-ante and ex-post evaluations, negotiating the SFPA and the protocol once the relevant EU institutions have given a negotiation mandate, and then managing the implementation of the protocol (as a member of the Joint Committee).
EUD in Madagascar	1 / EU	Monitoring of fisheries sector activities
MAPA - International Fisheries Relations Department, Spain	1 / EU MS govt.	Spanish management authority responsible for high seas fishing vessels and third country fishing agreements
DG AMPA	1 / EU MS govt.	French management authority responsible for high seas fishing vessels and fisheries agreements with third countries
ORTHONGEL	2 / EU private sector	Organisation representing French purse seiners
OPAGAC and ANABAC	2 / EU private sector	Organisations representing Spanish purse seiners
Organisations representing EU longliners (LL) of more than 100 GT : OPRAGU, OPNAPA, OPP-LUGO, etc.	2 / EU private sector	Organisations representing EU longline vessel owners. These should be Spanish and Portuguese longliners - the allocation of fishing possibilities by flag is not yet publicly available

Source: own elaboration based on desk review and consultation in Madagascar

3.4 Regional stakeholders

Regional organisations below are potentially relevant, given the participation of Madagascar – or Madagascans - in them and their role in regional fisheries management and research.

Table 4: Regional stakeholders of relevance to SFPA with Madagascar

Organisation	Category / Type	Main role
African Union	3 / regional	Include a unit involved in the fisheries and aquaculture development: African Union-Interafrican Bureau for Animal Resources (AU-IBAR)
COMESA	3 / regional	Common Market for Eastern and Southern Africa. Members including Madagascar. The COMESA portfolio of interventions includes blue economy development, for instance through the EU-funded ECOFISH intervention
FPAOI	2 / PTC private sector (regional)	Representing fishers at the sea basin level
IOC	3 / regional	The Indian Ocean Commission is an intergovernmental organisation comprising five member states: the Union of the Comoros, France on behalf of La Réunion, Madagascar, Mauritius and Seychelles. IOC promote diversified cooperation for the sustainable development of the Indian Ocean region: integrated management of marine and coastal ecosystems, sustainable fisheries, environmental education, health, governance, maritime safety, agroecology, culture....
IORA	3 / regional	The Indian Ocean Rim Association is an inter-governmental organisation of 23 Member States, including Madagascar, and 11 Dialogue Partners, with an ever-growing momentum for mutually beneficial regional cooperation through a consensus-based, evolutionary and non-intrusive approach.
IOTC	3 / regional	IOTC compiles fishery statistics from its members and from all entities fishing for these species in the Atlantic Ocean, coordinates research, including stock assessment, on behalf of its contracting parties

Organisation	Category / Type	Main role
SADC	3 / regional	The Southern African Development Community (SADC) is a Regional Economic Community comprising 16 Member States including Madagascar. The mission of SADC is to promote sustainable and equitable economic growth and socio-economic development through efficient, productive systems, deeper cooperation and integration, good governance and durable peace and security; so that the region emerges as a competitive and effective player in international relations and the world economy. Involved in the fisheries and aquaculture sectors and in natural resources management and protection
SANSAFA	3 / regional	Regional African non-State actors platform on fisheries and aquaculture (Note a SANSAFA Madagascar running as a national organisation too)

Source: own elaboration based on desk review and consultation in Madagascar. NB: APIOA - Association of Indian Ocean Ports based in Mauritius. Some port authorities in Madagascar are members, but the port of Antsiranana is not represented.

3.5 Donors active in Madagascar

The main donors active in the fisheries and aquaculture sector and in the wider blue economy (economic sectors and other maritime and coastal activities) identified during field work are the following:

- Germany, through its development agency GIZ, and the German cooperation bank KfW, is present in particular in fish farming and the protection of marine biodiversity. According to the GIZ focal point (comm., February 2023), Germany could consider becoming more involved in the development of the fisheries sector in Madagascar.
- The European Union, through national cooperation projects, intervenes on the scale of the maritime basin through various financing mechanisms (European Development Fund and interregional cooperation - INTERREG). Its regional interventions include, in particular, the ACP regional programmes FISH2, SmartFish, and currently ECOFISH. A multi-annual regional programme for the development of the blue economy in the Indian Ocean is currently being formulated.
- France and its French Development Agency (AFD). AFD has historically been active in continental fish farming development. Madagascar and France have a cooperation framework in strengthening maritime surveillance in Madagascar: the French Ministry of foreign affairs is currently supporting the Malagasy National Navy through a technical assistance project having namely the objective to develop a blue economy support base in Antsiranana by renovating the naval base there.
- The World Bank regularly intervenes in Madagascar in the fisheries sector, notably since 2017 through the financing of lines of credit and grants from its financing bodies for the implementation of the South West Indian Ocean Fisheries Governance and Shared Growth Programme (SWIOFish2 2017 - 2023) in Madagascar. The SWIOFish2 Programme will be fully closed in September 2023.
- The African Development Bank (AfDB) is contributing to the development of a multi-sectoral blue economy strategy.
- Japan, through its development organisation JICA, is contributing to the strengthening of the CSP and the small-scale fishing sector (see FAO infra for the latter). Also, the Japanese agency is preparing a project prefeasibility study to increase the building capacity of the Fisheries National School in Comoros as a regional fisheries training centre for Madagascar, Mauritius, and other French-speaking territories in the Western Indian Ocean.
- FAO is working with JICA and the NGO WCS on a small-scale fisheries development project in northern Madagascar, in the Diana region (which includes Antsiranana). The project will end in the second half of 2023. FAO is seeking funding mechanisms to ensure the extension of interventions after the end of the Project.
- The United States, through its agency USAID, is also active in the sector, including the development of guidelines for the development of Fishery Management Plans.

Also, the International Organisation of the Francophonie (OIF) plans to support Madagascar (MPEB) by creating jobs for young people and women in the promotion of the blue economy (bilateral meeting OIF – MPEB in May in Madagascar, comm. EU Delegation, May 2023).

In the table below, information is provided on donors active in Madagascar, where their activities are of potential relevance to the SFPA/Protocol.

Table 5: Donors active in Madagascar and their projects

Organisation	Main areas of engagement and relevant projects
GIZ - German development organisation (BMZ funded)	<p>Ongoing:</p> <ul style="list-style-type: none"> • Aquaculture: projet d'aquaculture durable à Madagascar (PADM). Period : 2019 – ongoing. Coordination: MPEB. Objective: (inland) aquaculture products, practiced with a view to sustainability and preserving resources, make a decisive contribution to combating malnutrition and undernourishment in Madagascar. Location: Highlands, Greater Antananarivo and East Coast regions of Madagascar. Collaboration in particular with the international NGO APDRA - Association-Pisciculture and Rural Development in Africa, in partnership with Madagascar (FOFIFA11) and French (CIRAD) research centers. Other implementing partners inc. NGOs and consultancy companies: Coeur de Forêt, COFAD, Norges Vel, Tilapia de l'Est. Budget: up to EUR 9.73 million (source: project brochure, GIZ's web page) <p>Note: Blue economy contact point for potential future interventions - see right cell</p> <p>In preparation:</p> <ul style="list-style-type: none"> • international fisheries and aquaculture development programme with BMZ funding - name "Sustainable Aquatic Food" (Nachhaltige Aquatische Lebensmittel). Potential focus in Madagascar: aquaculture; potential regional intervention in the SADC region to support existing regional bodies in aquaculture development and regional fisheries resources management – regional capacity development activities likely to be included (GIZ project designers, comm., July 2023) <p>Recently completed:</p> <ul style="list-style-type: none"> • Support to implementing the Port State Measures Agreement – PSMA - to fish illegal fishing (2018 – March 2022): regional intervention on three countries, Ghana, Madagascar, and Mozambique. Overall budget: EUR 1.5 million. Implementing partner in Madagascar: MPEB. Executing agency: stop illegal fishing (NGO). The PSMA entered into force internationally in 2016 and Madagascar accessed the Agreement in 2017 (FAO dedicated web pages to the Agreement; online Programme brochure) <p>Note: Fisheries Transparency Initiative (FiTI): GIZ supported Madagascar to become candidate country to the FiTI - Madagascar candidate country since December 2022 (https://fiti.global/madagascar)</p>
KfW - German development organisation (BMZ funded)	<p>Ongoing:</p> <ul style="list-style-type: none"> • MNP PCD II project Sustainable Coastal Fisheries – Phase II (Fr.-orig.: "Pêche Côtière Durable II"). Period: April 2021 – March 2025. Implemented by Madagascar National Parks (MNP) under a BMZ-KfW grant (BMZ project code: 2017 68 837; budget : EUR 7,2 million. Alike its predecessor PCD I (AHT TA, 2018-2022), PCD II is connected to the ongoing MNP FI-IV project (AHT TA) and implements 5 regional sub-projects, including marine protected areas in the Diana region, and through an internal grant mechanism in partnership with national and

¹¹ Centre National de la Recherche Appliquée au Développement Rural / Foibem-pirenena momba ny Fikarohana ampiarina amin'ny Fampandrosoana ny eny Ambanivohitra (CENRADERU/FOFIFA).

Organisation	Main areas of engagement and relevant projects
	<p>international NGOs. The overall objective (outcome) of PCD II is the sustainable management of natural resources in coastal areas with particular focus on mangrove ecosystems and their ecosystem services to local coastal communities and population, therefore small-scale fishers as main beneficiaries. The implementing national partner is the Ministry in charge of the environment. Ensuring synergies and collaboration with MPEB in charge of fisheries management in Madagascar has been being under discussion in the first semester 2023 to achieve better results (Director of small-scale fisheries MPEB, comm., July 2023)</p>
EU	<p>Ongoing:</p> <ul style="list-style-type: none"> • ECOFISH – 2018 – Sept. 2024 regional programme - https://ecofish-programme.org/fr/ : Objective: to enhance equitable economic growth by promoting sustainable fisheries in the Eastern African – Southern African – Indian Ocean region, with interventions in Madagascar. Budget: EUR 28 million. • RINDRA 2020 – 2023 programme: institutional support to the Ministries in charge of Agriculture, Livestock, Fisheries and Environment, therefore including support to MPEB. <p>In preparation / potential future intervention:</p> <ul style="list-style-type: none"> • SFPA – July 2023 – June 2027 Sectoral Support: technical implementation starting from Septembre 2023 • Sustainable Western Indian Ocean Programme (SWIOP): programme design under final validation phase. Programme on ocean governance, sustainable blue economy and conservation and restoration of coastal ecosystems in the Western Indian Ocean. Interventions in Madagascar included. Overall budget (forecast, to be confirmed): EUR 58 million. Period (to be confirmed in the final Programme Fiche): 2024 or 2025 to 2028 or 2029 • Potential support of the EU to MPEB technical staff in university postgraduate courses (potential intervention in discussion between the EU Delegation and MPEB)
FAO Madagascar	<p>Recently completed:</p> <ul style="list-style-type: none"> • Small-scale fisheries development project in northern Madagascar, in the Diana region. Ended in June 2023. Potential follow-up of interests to continue support the local beneficiaries • German funded project on PSMA implementation support (FAO reference code: GCP/GLO/1047/GER): see GIZ above and recent press release on a workshop on 1-2 June 2023 to establish a formalised interagency mechanism for the implementation of port State measures under the MPEB lead • FAO supported MPEB in using the FAO Voluntary Guidelines on Small Scale Fisheries when agreeing processes to involve small-scale fisheries interests (a workshop to use a toolkit to use these guidelines in November 2020).
The World Bank	<p>Ongoing and about to be closed</p> <ul style="list-style-type: none"> • SWIOFish2 – Madagascar - South West Indian Ocean Fisheries Governance and Shared Growth Project. Objective: to improve the management of priority fisheries at regional, national and Community level and access to alternative activities for target fishermen. Three intervention areas including the Diana region in the north of Madagascar. Period: 2017 – Sept. 2023. Among other activities: development of a fisheries management plan in the Diana region (about to be available to the public before the end of 2023), study to define sustainable funding to run the Fisheries Surveillance Centre (CSP)
France	Ongoing:

Organisation	Main areas of engagement and relevant projects
and its French development agency (AFD)	<ul style="list-style-type: none"> France – Madagascar cooperation in Maritime defence and security. Started year: 2016. Activities including: renovation of the Antsiranana naval base as potential integrated blue economy support base in Diego, and setting-up maritime surveillance and safety at sea coastal units (<i>sémaphores</i>) using radar and human resources. Potential opportunities to investigate: developing the base and the port in Antsiranana through multiple sources of funding. <p>Long track record in supporting development of inland fish farming</p>
National government funding, support by the NGO WWF	<p>Maritime spatial planning to promote blue growth in the Diana region up to 2042. Validation process of the in 2023. Co-ordination: Ministry of Land Planning and Services (MATSF), Ministry of Fisheries and the Blue Economy (MPEB), and Ministry of the Environment and Sustainable Development (MEDD), Diana region</p>
JICA	<p>Completed (among other activities):</p> <ul style="list-style-type: none"> Strengthening the small-scale fishing sector in the north of Madascar in collaboration with FAO <p>In preparation:</p> <ul style="list-style-type: none"> Project prefeasibility study stage to build the capacity of the Fisheries National School in Comoros as a regional fisheries training centre
USAID – USA development agency Non-exhaustive information	<p>In preparation:</p> <ul style="list-style-type: none"> Marine conservation, sustainable development, and governance project, Madagascar. Period: end of 2023 – 2027 (five year project). Including intervention in the fisheries sector. Activities will cover sustainable management of natural resources, protected areas, complimentary natural resource production for household uses, governance, advocacy and anti-corruption efforts around natural resource management, local resilience to climate and other shocks, marine tenure policy implementation and marine use planning (online information from the University of Rhode Islands and WCS / Blue Venture). <p>Completed:</p> <ul style="list-style-type: none"> USAID Hay Tao activity. Period: 2018 – March 2023. “USAID/Madagascar’s Conservation and Communities Project (CCP) helps protect Madagascar’s natural capital through improved conservation of the country’s unique biodiversity (Nature), promotion of resilient livelihoods to provide alternatives to unsustainable NRM practices (Wealth), and concrete actions to secure effective local management and ownership of natural resources (Power).”. Activities included: Improved process for the elaboration of fisheries management plans (PAPs) to establish good governance of marine and coastal resources, training in fish stock assessments, a comprehensive Fisherwomen Leadership Program in locally managed marine areas (LMMAs), support to the Mihari network (Hay Tao activity, final report – online).

Source: own elaboration based on desk review and consultation in Madagascar.

NGOs such as Blue Ventures and WWF Madagascar, also have a long track record in participating to the sustainable development of the fisheries and blue economy sectors in Madagascar too. For instance ongoing projects include:

-
- **Blue Ventures** is active among other activities in “support[ing] communities with the establishment of locally managed marine areas (LMMAs), and work[ing] with government partners to secure national recognition for community conservation initiatives. First developed in Madagascar by Blue Ventures in 2006, the LMMA concept has since been replicated by communities at hundreds of sites over thousands of kilometres of coastline, now covering almost one fifth of Madagascar’s inshore seabed” (Blue Ventures’ [web page](#) on Madagascar).
 - **WCS** in improving data collection in the fisheries sector (recent signature of a Memorandum of understanding with MPEB – August 2023 [press release](#);
 - **WWF** at the Western Indian Ocean sea basin in sustainable blue growth development and at national level with local governments to establish marine protected areas, and with communities to help them develop local marine resource regulation. Also, WWF Madagascar promotes more sustainable fishing, and new economic activities (seaweed, fish and shrimp farming). WWF encourages private investment on shrimp farming to adopt sustainable practices that will provide them with Aquaculture Stewardship Council (ASC) certification (<https://www.wwf.mg>).

4. Policy and legislative environment

4.1 Key policy documents and sectoral planning

The **2012 Good Governance Strategy for Maritime Fisheries** (MPEB, 2012) is being implemented and will be updated. The Strategy has the following general sectoral objectives:

1. To ensure the integrity of the natural capital and the sustainability of fisheries resources, and to contribute to the preservation of the marine and coastal environment;
2. To increase wealth creation in the sector, opting for differentiated approaches according to the fishery, sector or fleet concerned, both in terms of exploitation methods and in terms of value-added;
3. To ensure a more equitable distribution of the wealth created by the sector in line with the national objective of economic and social development of the country and poverty reduction; and
4. To increase the availability and improve the quality of fishery products in line with the food needs of the Malagasy population.

A blue economy strategy for all maritime and marine-based activities / sectors is currently being developed with the participation of all stakeholders (comm. MPEB, March 2023).

In the meantime, a **2022 blue economy strategy specific to the fisheries and aquaculture sectors**, drafted with the support of the African Union, was validated in 2023 (MPEB, 2022). The aim is to develop maritime activities in an integrated approach (the principle of 'sustainable blue economy') with a maritime spatial approach. One objective, among others, includes improving fisheries agreements by the establishment of a task force to analyse fisheries agreements and fishing activities, increasing the added value of fisheries agreements by fair access rights and integrating environmental costs, increasing the attractiveness of the Malagasy port infrastructure (MPEB, 2022). An action plan is expected to be available soon (drafted in the first semester 2023) to implement this Strategy with the support of consultants having been involved in developing the Strategy in 2022 (MPEB, comm., Feb. 2023).

MPEB aims to diversify small-scale marine fisheries so that they are more geographically distributed further from the coast to reduce in-shore exploitation. The Ministry therefore aims to develop the artisanal fishing segment (as defined in the Fisheries Act) while improving the management of small-scale and industrial fisheries (MPEB, comm., Feb. 2023).

4.2 2021 Tuna Fisheries Management Strategy

Support for the implementation of the 2021 tuna fisheries strategy is a key component of the Protocol's Sectoral Support (mentioned in the Protocol).

The **2021 National Tuna Fishery Management Strategy (NTFMS), an update of its 2015 version**, is taken into account in the framework of the SWIOFish2 programme interventions in Madagascar - some of the axes are already financed by the programme. The NTFMS has been validated within MPEB. Note that while MPEB implements it, it is still uncertain whether MPEB decides to have it approved through formal procedures¹² by the Government to implement it (comm., *Direction de la pêche industrielle et artisanale*, MPEB, February 2023).

The main objective of the Tuna Fisheries Strategy is to ensure the development of the national tuna fishing sector and improve the management of foreign tuna fishing within a

¹² That is as a regulatory text published in the Official Journal.

legislative, environmental and social framework adapted to the Malagasy context, in order to increase the inflow of foreign currency and strengthen food security while minimising threats to the ecosystem and falling within the management framework of the IOTC (MPEB, 2021). The NTFMS includes a logical framework and a programme of activities.

4.3 The 2015 Fisheries Act

The 2015 Fisheries and Aquaculture Act (Law n° 2015-53) and its implementing texts regulate the fisheries and aquaculture sector. The Code was drawn up in consultation with Madagascar's professional sector and international partners, in particular the EU and the FAO. The Act was adopted by the National Assembly in December 2015.¹³

According to the 2015 Fisheries Act (articles 26 to 31 and 34-35, fishing vessels flying the flag of a third country may be authorised to fish in the waters beyond the territorial sea provided for in fisheries agreements between the Republic of Madagascar and the flag State or the Union of countries, a fishing association or when chartered by Malagasy nationals.

Also, the Ministry in charge of Fisheries and Aquaculture shall cooperate with the coastal States of the Indian Ocean sub-region, or other developing States, with a view to drawing up common rules intended to harmonise the terms and conditions governing access agreements for foreign fishing vessels to their respective Exclusive Economic Zones (art. 36 of the Fisheries Act).

Table 6: Key policies, legislation and management arrangements of relevance to SFPA/Protocol in Madagascar

Policy, legislation, or management arrangement	Summary of content
2022 blue economy strategy specific to the fisheries and aquaculture sectors	- The aim is to develop maritime activities in an integrated approach (the principle of 'sustainable blue economy') with a maritime spatial approach. One objective, among others, includes improving fisheries agreements by the establishment of a task force to analyse fisheries agreements and fishing activities, increasing the added value of fisheries agreements by fair access rights and integrating environmental costs, increasing the attractiveness of the Malagasy port infrastructure
2021 NTFMS	- The main objective of the Tuna Fisheries Strategy is to ensure the development of the national tuna fishing sector and improve the management of foreign tuna fishing within a legislative, environmental and social framework adapted to the Malagasy context, in order to increase the inflow of foreign currency and strengthen food security while minimising threats to the ecosystem and falling within the management framework of the IOTC
2015 Fisheries Act (and its implementing texts – Decrees and Ministerial texts)	- Summary of relevant sections: <ul style="list-style-type: none"> ○ Fishing vessels flying the flag of a third country may be authorised to fish in the waters beyond the territorial sea provided for in fisheries agreements between the Republic of Madagascar and the flag State or the Union of countries, a fishing association or when chartered by Malagasy nationals. ○ Cooperate with the coastal States of the Indian Ocean sub-region, or other developing States, with a view to drawing up common rules intended to harmonise the terms and conditions governing access agreements for foreign fishing vessels to their respective EEZs

Source: own elaboration

¹³ The Act has been modified partly through the Law n° 2018-026. However, these revisions do not concern the articles mentioned in this section.

5. Background information on fisheries and aquaculture Madagascar

5.1 Sub-sectors, landings, and marketing

Fisheries and aquaculture are estimated to contribute about 5 % of Madagascar's GDP (MPEB estimate).

Marine fisheries consist of:

- *Small-scale fishing* :
 - A traditional fishery named "small fishing" since 2016 in fisheries statistics, in French *petite pêche*. This activity is carried out in waters under Malagasy jurisdiction using motorised craft with a total engine power of less than 15 horsepowers (HP), non-motorised boats or on foot., and
 - An "artisanal fishery", in French *pêche artisanale*, defined from 2016 as fishing by decked or open vessels/crafts with an engine power between 15 and 50 HPs (Fisheries Code of December 2015); and
- *Industrial fishing*:
 - Fishing activity using motorised vessels whose total engine power exceeds 50 hp.

Industrial catches include:

- Inshore and deepwater shrimp and related bycatch;
- Demersal fish; and
- Tuna and associated bycatch (sharks, billfish).

Aquaculture consists of inland production (carp, tilapia, trout) and marine production (shrimp in particular, and also seaweed and sea cucumbers).

Fisheries and aquaculture production was just over 125 000 t in 2021 (down from 163 500 t in 2017). Small-scale maritime fishing alone accounts for almost 80-90% of maritime production each year, not taking into account catches by foreign vessels in waters under Malagasy jurisdiction. Artisanal maritime fishing, the *pêche artisanale* sub-sector, is negligible.

The share of shrimp farming in value terms is consistently high due to the commercial value of shrimp, which is one of the main fish products for export (in value terms). The other main export products are tuna and canned tuna. A tuna cannery in Antsiranana in northern Madagascar has been operating for several decades.

The top ten recipient destinations of fishery products in 2022 are, in descending order: France (mainland), China, Germany, Netherlands, La Réunion (French territory in the Indian Ocean and EU outermost region), Spain, Mauritius, Italy, South Korea, Morocco. The main recipient by value is France (EUR 106 million), which imports aquaculture shrimp and wild shrimp in particular, which then allows these products to be marketed by private importers throughout the EU (ASH 2023 data).

Fishing by foreign vessels target tuna and associated species including billfish and some shark species. EU, Japanese, Seychelles and Mauritian vessels targeting these species have historically been active in Malagasy waters.

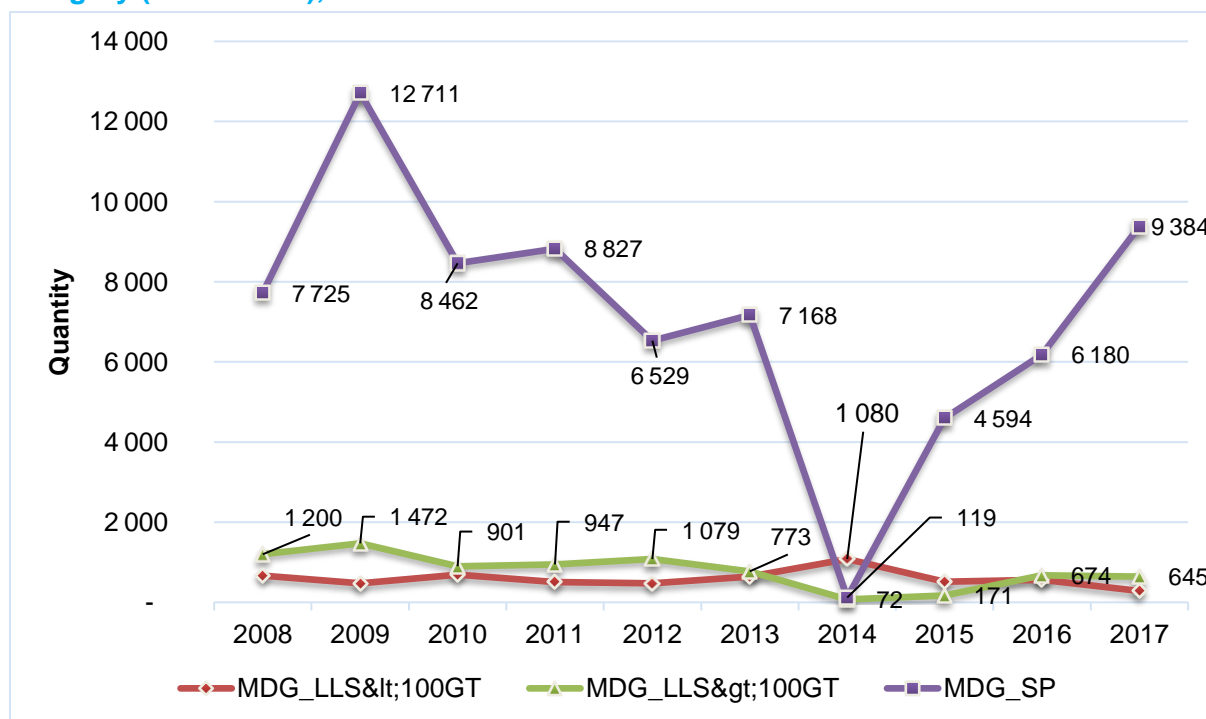
The EU vessels are tuna seiners and small and large longliners (see Section 2). The Japanese vessels are longliners. The Mauritian and Seychelles vessels are tuna seiners. Purse seiners work with support vessels for which specific fees are also fixed in the agreements signed by Madagascar with the EU. Support vessels provide to purse seiners fuel supply, and/or periodic transportation of catches to shore. Some fleets use supply vessels to plant and check fisheries aggregating devices (FADs) and to maintain them.

Madagascar has fisheries agreements with a Japanese longline fishing company “Japan Tuna” and with “InterAtun”, an organisation representing the tuna seiners of Mauritius and the Seychelles, which are “public-private” fishing agreements.¹⁴ Within these agreements, there is no specific funding to develop the fisheries sector, that is there is no “sectoral support” included.

Part of the catches of these fishing vessels in the Southwestern Indian Ocean are landed or transhipped in the port of Antsiranana.

EU purse seiners caught around 6 000 – 8 000 t/year of tuna and associated species over the period 2007-2017 (reminder from Section 2: no EU vessels authorised to fish in Malagasy waters from 2019 to June 2023). EU longliners caught around 1 000 t of tuna per year over the period 2013-2017 (cf. Figure 4 below). The historical catch data for the EU fleet clearly shows the variations in tuna abundance in the Madagascar fishing zone, with exceptionally low years (2014) and exceptionally high years (2009 - around 13 000 t for EU purse seiners).

Figure 4: Annual catches by EU seiners and longliners in the Malagasy fishing zone by category (2008 - 2017), in tonnes



Legend: LLS<100GT, surface longliners of 100 GT or less and SP, tuna seiners; NB: 2017, provisional data from January to October. Source: elaboration by the consultant according to DG MARE data from the evaluation report of the 2015 - 2018 Protocol, evaluation carried out in the first quarter of 2018.

EU tuna purse seiners in the Indian Ocean are large vessels (80 m and over). Just under thirty EU purse seiners are authorised to fish in the Indian Ocean (IOTC data¹⁵). They catch tuna on the surface and subsurface using large encircling nets either on free schools or using Fish Aggregating Devices (FADs). The target species are skipjack, yellowfin tuna and bigeye (or “patudo”) tuna. The fishing grounds extend over the entire tropical western Indian Ocean, mainly between 5°N and 10°S (see figures in the presentation used during the workshop, Annex 1). These vessels mostly make trips of around 45 days and mainly use the port of Victoria (Seychelles) for landing/transhipping catches and bunkering operations between

¹⁴ The recently published website of MPEB provides information on current foreign fishing arrangements signed by Madagascar with the associations representing foreign fishing vessel owners and with the EU – link [here](#).

¹⁵ According to data extracted from the [IOTC](#) website on 9 March 2023, there are 28 EU seiners: 15 Spanish, 12 French and 1 Italian.

trips and to a lesser extent Mauritius and Madagascar. Catches are frozen on board in brine and sold as raw material to canneries in the Seychelles, Mauritius, and Madagascar. Some tuna seiners may use support vessels that deploy FADs and provide logistical assistance (cf. supra). Tuna seiners also use the port of Antsiranana (Madagascar) for light maintenance and repair when operating in the Mozambique Channel region. The shipyard in Antsiranana is SECREN - *Société d'études, de construction et de réparation navales*, which is a commercial company with public shareholding. However, tuna seiners preferably and in general use Port Louis (Mauritius) for major technical stops requiring the intervention of the shipyard *Chantier Naval de l'Océan Indien* (CNOI).

The tuna seiners fish mainly skipjack and yellowfin tuna and to a lesser extent bigeye tuna and albacore (*Thunnus alalunga*¹⁶) in Malagasy waters in general.

EU surface longliners are of two types:

The **surface longliners of more than 100** are mainly deep-sea vessels of about 35 m and which catch several species with lines on which several hundred hooks are mounted. The trips of these vessels can last several months. The target species are swordfish, oceanic blue sharks (*Prionace glauca*) and shortfin mako. These vessels mainly use the ports of Durban and Cape Town (South Africa) or Port Louis (Mauritius) for their unloading. The fishing areas mainly cover the subtropical zones between latitudes 20°S and 35°S (see figures in the presentation used during the workshop). The catches of these vessels are frozen on board and intended for human consumption without substantial processing. The fins are destined for Asia.¹⁷ This category also includes the largest units (≈ 24 m) of the Reunion longline fleet.

These longliners fish mainly swordfish in association with the blue shark (*Prionace glauca*) in Malagasy waters.

Carcharinid sharks, including the blue shark, will be subject to greater controls on trade from 25 November 2023, following their recent inclusion in [Appendix 2 of CITES](#) - the Convention on International Trade in Endangered Species of Wild Fauna and Flora. Note that the status of the blue shark stock in the Indian Ocean is estimated not to be overexploited or overfished based on information available in 2021.¹⁸

Surface longliners of less than 100 GT are mostly vessels of about 13-15 m that fish mainly bigeye tuna, swordfish and the other tropical tunas (yellowfin tuna and albacore). Vessels in this category keep their catches fresh on board. Trips last about ten days. The vessels in this segment are based in Reunion and operate around the island, extending their activities westwards into the Madagascar fishing zone and eastwards into the Mauritius fishing zone, within the framework of the Protocol concluded with that country. The catches of these vessels are unloaded in Reunion and sold either on the local market or on the EU mainland market. No vessels based in Mayotte, the other French outermost region in the sea basin, use fishing opportunities in Madagascar (situation under the previous protocol).

Compared to the catches of the tuna segments of EU fleets in the Indian Ocean as a whole, the catches obtained in the Madagascar fishing zone, when the EU fleet was active¹⁹, represented:

- For tuna seiners, on average 3 % of their total catches, both for Spanish and French vessels;
- For longliners over 100 GT, between 1 % (2015) and 4 % (2016) of their total catch;

¹⁶ It is important to distinguish between albacore (*T. alalunga*) and yellowfin tuna (*T. albacares*) because of name confusion between English and French [*albacore* for yellowfin tuna].

¹⁷ Export is usually exclusively to Asia. Export to other countries is possible but was not verified by the consultant during this mission.

¹⁸ see '[Executive Summary](#)' on the [dedicated IOTC page](#) - information from 6.03.2023

¹⁹ Reminder: previous EU-Madagascar fisheries agreement was "dormant" from 2019 to June 2023.

- For longliners of less than 100 GT, 34 % (2015) to 36 % (2016) of the 1 800 tonnes caught by this fleet in all the fishing areas frequented. The proportion can reach 65 % for some vessels. The Reunion fleet is therefore much more dependent on this fishing area than the EU fleet segments mentioned above (according to the Protocol Evaluation Report 2015 - 2018).

5.2 Status of stocks targeted by EU fishing vessels

The regional fisheries management organisation for tuna and tuna-like species, the Indian Ocean Tuna Commission (IOTC), monitors the status of stocks and establishes management measures for these fisheries and the species under its mandate (IOTC resolutions are binding the IOTC members while recommendations are voluntary measures). These species are highly migratory in the Indian Ocean. For tropical tuna stocks and major commercial sharks caught by the EU fishing vessels in the Western Indian Ocean:

- Skipjack¹⁶ and swordfish (*Xiphias gladius*) are not subject to overfishing or nor overfished (2020 IOTC stock assessment for both);
- Bigeye tuna and yellowfin tuna stocks are overfished and subject to overfishing (2022 IOTC stock assessment and 2021 IOTC stock assessment respectively).

Yellowfin, bigeye, and skipjack stocks are subject in the IOTC management area to overall catch limits, called total allowable catches (TACs), for the different fleets targeting it with further catch allocations (quotas) for some IOTC members such as the EU, Seychelles, Mauritius for yellowfin tuna ([IOTC circular 2023-47](#) for example).

For blue shark (*Prionace glauca*), the status of the stock is not overexploited and not subject to overfishing (2021 IOTC stock assessment).

Table 7: stock status of the main species of fish caught by EU fishing vessels in the Western Indian Ocean including Malagasy waters

Species	Stock status
Skipjack tuna - <i>Katsuwonus pelamis</i>	not overfished and not subject to overfishing
Yellowfin tuna - <i>Thunnus albacares</i>	overfished and subject to overfishing
Bigeye tuna - <i>Thunnus obesus</i>	overfished and subject to overfishing
Swordfish - <i>Xiphias gladius</i>	not overfished and not subject to overfishing
Blue shark (<i>Prionace glauca</i>)	not overfished and not subject to overfishing

Stock status colour key: green – not overfished and not subject to overfishing; red - overfished and subject to overfishing. Source : [dedicated](#) IOTC [page](#).

5.3 Port infrastructure and services

5.3.1 Main commercial port for industrial vessels to land tuna in Madagascar

The port of Antsiranana is one landing and servicing / provisioning / refuelling point for EU fishing vessels operating in the sub-region.

A tuna canning factory is also active there, where a significant number of women are employed: the cannery, called PFOI, employs 1,500 full-time equivalents – FTE, among which 70 % are women (PFOI's Production site Director, comm., 5 May 2023).

Other services providers from Antsiranana include among others:

- A shipyard: SECREN (see section 5.1). SECREN has financial and equipment difficulties and are looking for new shareholders and diversification of activities. Their financial situation worsened with the COVID crisis in 2020. The shipyard continues to

be used by some purse seiners active in the Western Indian Ocean by bringing their own equipment and own technical staff. Having operational light maintenance and repair services in Antsiranana would ensure that the port is attractive to tuna fishing companies willing to land or tranship there.

- A salt provider *La Compagnie salinières de Madagascar*. Salt is used by purse seiners to brine their catch on board before freezing it.

The situation of port and related services in Antsiranana needs to be understood thoroughly in order to identify what could be achieved in supporting the Port development within and outside the framework of the Protocol's Sectoral Support to the SFPAs in the future.

5.3.2 Port charges

EU fishing vessels into Madagascar are subject to port charges set by APMF based on the following Malagasy legislation:

- Interministerial Order No. 5268/2018/MTM, setting the rates for maritime flow fees
- Service note 11°1260-APMF/DG/08, on holiday allowances, in particular those relating to boarding and departure visits
- Interministerial order n°12465/2018/MTM, setting the tariffs for port duties and charges levied in Malagasy commercial ports other than Toamasina
- Interministerial Order n°28 549/2010 -MT/MFB/10 setting the fees for issue, renewal and endorsement of maritime administrative documents and accesses, the fees for mortgage registrations, the fees for ship safety surveys and the fees for members of the Survey Commission (APMF, [note](#) to port users and operators, 30.01.2020).

6. How to increase benefits from EU fleet activities to Madagascar in terms of fish landings and employment: Findings

6.1 Malagasy interests from EU vessel catches

Malagasy interests for EU vessel catches are:

- For **national revenues**: access rights paid by EU fishing vessel owners and the EU contribute to national revenues. These amounts can be used at the discretion of the Malagasy government (see section 2.3).
- For **direct and indirect employment**: catches from EU vessels in the Western Indian Ocean, including Malagasy waters when a fisheries agreement between the EU and Madagascar is active, are partly landed and processed in Madagascar in Diego. Indirect employments are linked to inland activities and ancillary services provided in Diego (see other sections of 5.3).
- For **food security**: part of the catches landed in Diego, although marginal, are consumed by the Malagasy population (see other sections of 5.3).

Additional to the above, EU catches authorised in Malagasy waters through an EU fisheries agreement include Sectoral Support. This Sectoral Support also aims to achieve socio-economic benefits to Malagasy stakeholders within the fisheries sector and the Malagasy blue economy through its results.

6.2 EU vessel landings

Current levels of landings

Landings of tuna from EU and non-EU vessels to Diego fluctuated slightly above 20,000 t a year around 2014 -2016 when the EU vessels were active in Malagasy waters (Figure 5). Transshipments of tuna in Diego occur but are limited. Based on APMF data, EU and non-EU vessel landings in Diego, corresponding to data on import of tunas through Antsiranana, are estimated as 15 584 t in 2022²⁰.

A system for landing so-called "*faux-poissons*" from EU fishing vessels (EU tuna seiners) that are not destined for canning is operational. These are damaged large tropical tunas and fish caught in association with them (small tunas and associated species such as mahi-mahi or dolphinfish). Catches by EU and non-EU purse seiners then contribute to a small extent to the supply of fisheries and aquaculture products to the domestic market.

The volume of products supplying the local market represented 1.8% of the volume of tuna landed and transhipped by the tuna vessels that came to the port of Antsiranana between 2011 and 2016, i.e. less than 500 t per year according to Tuna Statistical Unit of Antsiranana (USTA data).

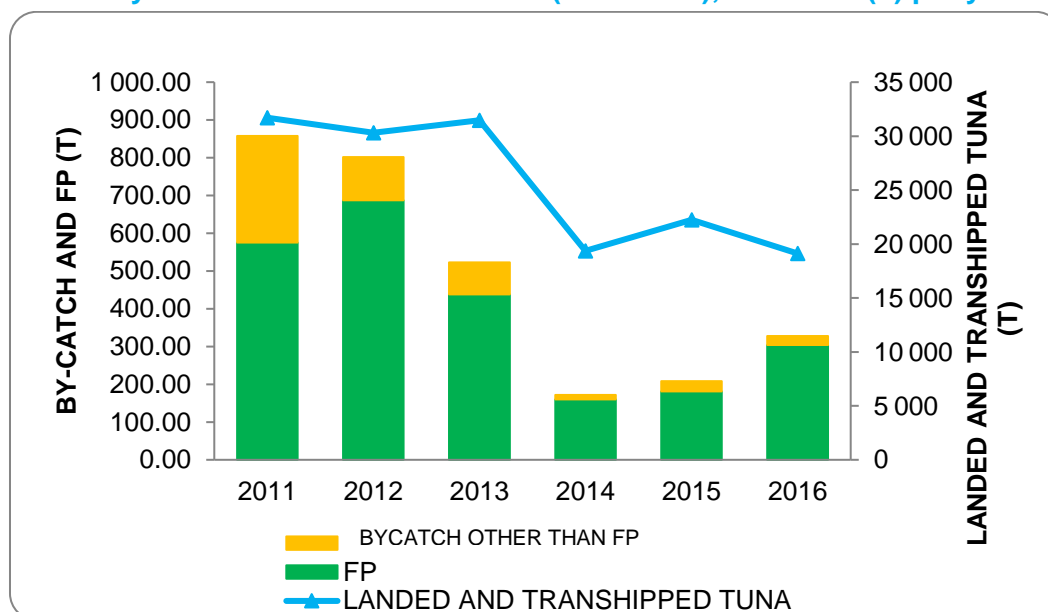
Just **under 500 t of *faux-poissons*** not accepted by the tuna cannery and by-catch of non-tuna species **were landed on average over the period 2017 - 2021** (according to DESP-MPEB data; Figure 6). Almost 100 % of these *faux-poissons* come from EU tuna seiners, i.e. 96 % on average over the period 2017-2021 (MPEB, regional office in Diego). The 500 t of *faux-poissons* have an estimated final sales value of about EUR 1 million assuming a sales price of around EUR 2 / kg.

²⁰ According to Eurostat data, landings from EU vessels to Madagascar (to Diego), have been decreasing since at least 2017: from 7,552 t in 2017 to 469 t in 2022 (corresponding to whole frozen tropical tunas in Eurostat). EU landings are said to have risen again in 2023 (MPEB regional staff, comm., May and July 2023) but the data are not available on Eurostat yet. Only data from APMF are mentioned in the main text above.

The faux-poissons being landed however have not been sold in the vicinity of the port for the past 5 years or so, and are therefore not contributing to the protein supply to the Diego population. The supply chain is currently monopolised by key actors that trade these products outside of the Diego vicinity, without conforming to the national trade rules. Traders do not have a collection permit, do not comply with the need for specific trade documents when fish is sold outside the Diana region, and increase seafood safety risks. The public authorities are concerned by this informal supply chain and have great difficulties to control it.

The Diana Region’s representatives recommended that independent technical support be carried out to get a better understanding on the faux-poissons supply chain and its actors and, based on this understanding, to professionalise the supply chain in the medium term.

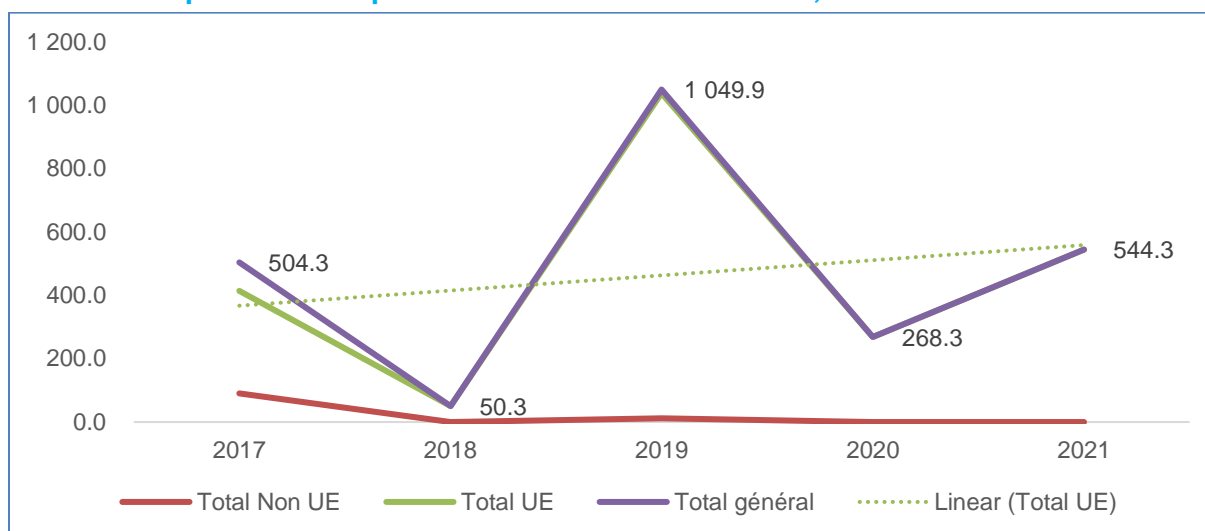
Figure 5: Landed and transhipped tuna and variation in by-catch and “faux-poissons” landed by tuna vessels in Antsiranana (2011-2016), in tonnes (T) per year



Legend: In the USTA data above, tuna not accepted by the cannery are listed as *faux-poissons* (FP)²¹ while ‘by-catch other than FP’ represents all other species than tuna listed as *faux-poissons*. Source: USTA. Note: USTA no longer exists since early 2022

²¹ Note these specific definitions of ‘faux-poissons’ can be different to those applied in Côte d’Ivoire, where it includes all species including tuna landed by purse seiners but not intended to the local tuna canneries.

Figure 6: Volume of “faux-poissons” in landings and transhipments of tuna and associated species in the port of Antsiranana 2017 – 2021, in tonnes



Source: data from MPEB – regional office, figure elaborated by Poseidon

Interest and opportunities of EU vessels to land in Madagascar

EU vessels' interest to land in Madagascar are related to local services provided and depend on the type of fishing strategies.

EU purse seiners' interests to land in Diego are:

- Providing products to the tuna cannery operating in Diego;
- Use of ancillary services in Diego while landing or for other purpose not linked to landing activities: minor maintenance and repair to fishing vessels and their fishing equipment (nets); salt supply, fuel supply, and to a lesser extent embarking-disembarking some seamen and observers.

Opportunities for the EU purse seiners to use Diego for landing and ancillary services relate to the competing quality and costs of these services in Diego compared to other ports in the Indian Ocean, most notably Seychelles and Mauritius. Some of the EU purse seiners also have a business relationship with the tuna cannery in Diego and therefore are more inclined to land part of their Western Indian catches in Diego.

In summary, the port in Diego is one of the EU purse seiners' ports to land and access port services based on their fishing and landing strategies in the Western Indian Ocean.

EU longliners do not use Diego as a service and landing port in general. Their fishing and landing strategies are not dependent on Diego. MPEB would like to investigate through a medium-term approach how to interest EU fleets in using Malagasy ports more (MPEB, comm., 1 August 2023).

There do not appear to be any current/ongoing international cooperation projects supporting increased landings by EU vessels.

6.3 Current product flows of EU catches

EU purse seine catches which are landed to Madagascar are destined for the tuna cannery in Diego.

Canned tuna from the cannery are mostly exported to the EU: without distinguishing the original of the raw products, that is from EU and non-EU vessels, 9,174 t of canned tunas were exported to the EU in 2022 with a value of EUR 38 million. Exports of canned tuna by the EU showed a decreasing trend until 2021, while exports increased in 2022 compared to 2021 (Annex 5).

Tuna, by-catches and tuna not intended for the cannery caught by EU purse seiners are landed by the dockers.

By-catches and tuna not intended for the cannery used to be sold in Diego. In the last couple of years, they were sold outside Diego in regions neighbouring the Diana region.

EU longliners land in locations other than Madagascar.

6.4 Use/employment of Malagasy observers and crew by EU vessels

Current employment creation, and crew employment condition and rights

In the 2023 – 2027 Protocol, the minimum number of Malagasy seafarers to be employed on EU fishing vessels are:

- Three for each seiner
- Two for each longliner with a tonnage greater than 100 GT.

There is no minimum number set for longliners of 100 GT and less in the SFPA / 2023-2027 Protocol.

Conditions and rights to use Malagasy seafarers (fishers and other staff on board vessels) are set in the Protocol in its Annex Chapter V and its Appendix 10. The SFPA and its current Protocol promote the ratification and implementation of International Labour Organisation (ILO) and International Maritime Organization (IMO) conventions. Among other conventions of relevance to embark Malagasy seafarers are:

- The ILO Convention C188 on working rights of fishers on board fishing vessels.²² Madagascar is not party to this Convention, which is in force internationally since 2012. A country shall ratify it to apply it to its fishing vessels. Spain ratified it in 2023 and it will enter into force in Spain in Feb. 2024. It is in force in France since 2015 (ILO, dedicated [web page](#) presenting the list of countries having ratified the C188 Convention, situation 17 July 2023).
- The IMO International Convention on Standards of Training, Certification and Watchkeeping for personnel on board fishing vessels (STCW-F). The Convention applies to personnel serving on board seagoing fishing vessels flagging countries having adhered to the STCW-F (the STCW Convention is another one, which does not apply to fishing vessels but to merchant ships). The STCW-F entered into force in 2012.²³

In the previous 2015 – 2018 Protocol, the number of Malagasy seafarers employed on board EU tuna fishing vessels active in Malagasy waters represented 23 % of the total seafarers used on board these EU vessels. The French longliners of 100 GT and less historically use an important number of seafarers from Madagascar as they are based in La Réunion: 40 % of their total crew. The 2015 – 2018 Protocol evaluation estimated that around 100 Malagasy seafarers in full time equivalent were used on board EU tuna fishing vessels in the Western Indian Ocean as a whole i.e. not specific to employment on EU vessels while within the Malagasy waters (F&S, Poseidon and MegaPesca, 2018).

²² The Maritime Labour Convention (MLC), internationally in force since 2013, does not apply to fishing vessels (article 2.4 of the MLC). Madagascar adhered to the MLC in June 2023 and it will enter into force in Madagascar on 15 June 2024 (see ILO dedicated [web page](#) on the MLC, situation 17.07.2023).

²³ The STCW-F has been reviewed with a view to subsequent adoption in the first semester 2024. The revised version should facilitate further 'free mobility of fishers and recognition of certificates between countries that have ratified and implemented the STCW-F Convention' (IMO, dedicated web page, [1](#) and [2](#))

Interest and opportunities of EU vessels to employ Malagasy nationals

For some stakeholders consulted in Madagascar during the research study, the use of Malagasy seafarers could and should be increased either by imposing stronger requirements within the Protocol to the SFPA or by promoting the use of Malagasy seafarers to the EU tuna vessels active in the Western Indian Ocean and in the Malagasy waters (by increasing their skills, etc.). For some of the consulted stakeholders, the main constraint is the high level of employment of West African seafarers rather than Malagasy ones on board EU tuna fishing vessels.²⁴

Potential for the Sectoral Supports and international cooperation projects to support increased employment of Malagasy nationals on EU vessels

According to Article 8 and Chapter V of the 2023 – 2027 Protocol, part of the funding from the 2023 – 2027 Protocol reserved for Sectoral Support may be used for the purpose of training Malagasy seafarers to be embarked on board EU fishing vessels active in the Malagasy fishing zones covered by the Protocol.

The expected amount allocated to training fishers under the component to promote seafarer employment in the fishing sector (“Promotion du métier de marins à la pêche (Agence Portuaire, Maritime et Fluviale)”) is small over the 2023 – 2027 Protocol period: slightly less than EUR 50 000 over 4 years or around EUR 10 000 per year, i.e. 1 % of the total budget of the Sectoral Support (Table 1).

While working conditions on board EU fishing vessels active under the FPA are generally satisfactory (e.g. see F&S, Poseidon and MegaPesca, 2018), there may be room for improvements which could be supported through development interventions and governance improvements. For instance, the APMF, the Port Authority in charge of controlling contracts signed between Malagasy seafarers and EU fishing vessels, made a proposal to MPEM to support Madagascar in preparing the country and local stakeholders to gain better knowledge, ratify, implement, and control the effective enforcement of International conventions applicable to fishing vessels such as the STCW-F, the ILO C188, and the Torremolinos Convention on safety on board fishing vessels.

²⁴ In May-June 2023, West African seafarers on board EU tuna fishing vessels in the Atlantic and Indian oceans went on strike. They requested better social and working rights protection, especially in the SFPA between the EU and Côte d'Ivoire. On the French tuna fishing vessels in the Western Indian Ocean, at least, the different parties considered that there was space for dialogue and listening to improve the seafarers' working conditions on board (Le Marin, 9 June 2023, link [here](#)).

7. How to design and implement the Sectoral Support component of the SFPA more effectively through better integration with international cooperation projects, especially to support local value chains of small-scale fishery products, gender equality, and food security: Findings

7.1 Sectoral support content

The Sectoral Support includes small-scale fisheries development interventions under different axis of intervention (see section 2.4 for the overall content of the Sector Support Programme / matrix). However, the Ministry of fisheries in Madagascar has historically prioritised the use of Sectoral Support funds from the EU fisheries agreements to carry out fisheries surveillance and seafood safety activities. Within the specific axis “1”, development of coastal and artisanal fishing” (see Table 1 on page 11), the following activities are intended to develop artisanal and small-scale fishing over the 2023 – 2027 period:

1.1	Pilot project to improve fishing practices in selected villages	EUR
1.1.1	Equipping fishers with 9 HP motorised fishing boats	280 395
1.1.2	Equipping fishers with improved fishing gear	24 365
1.1.3	Train fishers in modern fishing techniques	29 586
1.1.4	Installing coastal FADs	31 907
1.2.	Value chain development	
1.2.1	Support the creation and/or operationalisation of cooperatives of fisheries stakeholders	28 714
1.2.2	Equipping fish processing and conservation units	417 690
1.2.3	Providing stakeholders with materials and equipment for processing and preserving fish products	29 006
1.2.4	Train fishmongers, women and young people in fish processing techniques	24 170
	Total	865 834

7.2 Sectoral support processes

The FPA was dormant in the first semester 2023 therefore no Sectoral Support was provided. The 2023 – 2027 Sectoral Support is expected to start from September / October onwards. The coordination of the Sectoral Support is programmed to be achieved with a portion of its budget (see Table 1).

During the remote consultation in 2022 completed under this study, and confirmed during missions, different local stakeholders such as a national network of associations representing women active in the fishing / fish trading sector (RENAFEP-Madagascar) and local NGOs active in Madagascar expressed their satisfaction to have been able to take part in the upcoming EU-Madagascar SFPA negotiation process. They now wish to be consulted during the process of developing and implementing the Protocol's multi-year Sectoral Support matrix for the SFPA in the future.

The detailed implementation planning of the Sectoral Support is scheduled to be available from September 2023. Especially, it is unclear, at this early stage, how MPEB expects to ensure regular consultation of the civil society and regular information dissemination towards the civil society and any public on the Sectoral Support implementation results.²⁵

The current version of the Sectoral Support matrix provides indicators to monitor success for the 1st implementation year only. These indicators look relevant and achievable on overall. To continue to ensure an effective implementation, indicators could be developed for the next years by applying the approach of Specific, Measurable, Achievable, Relevant and Time-bound or “SMART” indicators. Indicators and targets disaggregated by gender (and potentially by age) are not currently included. MPEB informed the Consultant that the detailed content of the matrix is scheduled to be strengthened during and following the Joint Committee meeting scheduled in September 2023.

²⁵ Increasing public dissemination of information on the results of the Sectoral Support implementation was discussed by the International Consultant with MPEB (see proposed recommendations).

8. Conclusions and recommendations for a strategy to increase the benefits of the SFPA to Madagascar

This final section builds on the findings presented in preceding sections to generate key conclusions and recommendations. The content of this section is based on the national consultations during the three missions, and the national workshop held during the third mission.

8.1 EU vessel landings and employment on EU vessels

8.1.1 Conclusion

Negative

1. Due to the strong comparative advantage of Seychelles and Mauritius as a tuna landings hub for EU vessels and ancillary services (due to fishing patterns/locations), it may be difficult for Madagascar to significantly increase volumes of catch being landed in Madagascar.
2. Light vessel maintenance and repair services in Diego are weakened by the shipyard having financial and non-financial difficulties. Ensuring vessel maintenance availability in Diego is one of the main assets to attract EU fishing vessels to use Diego as a landing and stopover port.
3. The supply chain of faux-poissons from EU vessels not sold to the Malagasy cannery are controlled by informal traders in association with local stevedores, among others. Public staff in charge of enforcing trade and sanitary measures have difficulties to control the *faux-poissons* supply chain. Faux-poissons landing in Antsiranana are currently sold outside Antsiranana.
4. The number of Malagasy seamen used by EU fishing vessels is low on EU purse seiners and large EU longliners. These vessels are used to contracting skilled foreign seafarers from other countries (e.g. from West African countries).
5. Malagasy stakeholders, the State, and non-State actors active in the fisheries and related maritime sectors, have a low understanding of the SFPA and its Protocol due to a lack of awareness of how the EU fisheries agreements are negotiated, designed, and implemented increasing the risk of opposition to the SFPA.
6. With respect to crewing, the Sectoral Support provides some technical support for training but the allocated amount is small: less than 1 % of the total Sectoral Support budget.

Positive

7. A cannery operates in Antsiranana (Diana region) attracting EU fishing vessels to land part of their Western Indian Ocean catches. Ancillary services are present in Diego, such as light repair and maintenance (even if facing difficulties), crew supply, salt supply).
8. Willingness / interest of local government authorities to support the development of the region's tuna fishing industry and ancillary maritime sectors (that is in Antsiranana and the Diana region).
9. A maritime cluster operating in the Diana region has been recently created: le « Comité multi-sectoriel de la pêche et de l'économie bleue de la région de Diana ». It is a relevant multi-sectoral stakeholders consultation platform to improve governance in the fisheries and the blue economy in Diego and the Diana region with potential to lobby their needs to the central government.

10. Landings of faux-poissons, albeit limited and with issues to operate within a fully regulatory framework, bring socioeconomic benefits to Madagascar from EU tuna landings.

8.1.2 Recommendations

MPEB should:

1. Ensure that the civil society in Madagascar is consulted before and after the annual meetings of the Joint Committee and obtain written and oral feedback of what was discussed during these Joint committee meetings. Civil Society could participate as observers in specific sessions of the Joint Committee meetings when held in Madagascar – for instance on interactions of EU fishing vessels with small-scale fishing actors in the Malagasy EEZ and on the implementation of the Sectoral Support.
2. Provide regular written public outcomes on the implementation of the Protocol both within its access²⁶ and Sectoral Support components as ‘public implementation reports’ uploaded on the MPEB’s website <https://www.mpeb.mg/>.
3. Study the potential to increase the socio-economic benefits of landings, tuna canning, and ancillary services for tuna fishing vessels and tuna trading in Diego with close collaboration between the private actors and public representatives at local, regional and national level (Diego local council, Region, Prefecture, cannery operator, tuna foreign fishing fleet operators, the shipyard, the local salt and fuel providers, local-national-international NGOs, technical and financial partners, the maritime cluster operating in the Diana region, etc.). The intention should be to design and implement an integrated territorial development of Antsiranana and the Diana region for employment and food security benefits by strengthening tuna landing- processing-trading, local fish supply chains, and ancillary activities. A project / programme funded by different donor partners could then be considered, implemented in synergy with cooperation projects currently funded by France and other EU Member States. This association of EU Member States funding may unlock EU cooperation funds too - see section 8.2.2. Local fish supply chains in the territory could then be improved through this project (by focusing on the upstream stage of fish supply chains up to local fish processing / storage companies in the region).

The integrated development approach in Antsiranana should:

- a. be complementary with current and recently completed interventions by the Malagasy national and regional/local public governing bodies implementing their sectoral and intersectoral strategies and planning documents (such as the NTFMS, the regional fisheries management plan in Diana, the Maritime Spatial Plan for the Diana region, ...) and financial and technical partners supporting them (such as the French government, FAO, USAID, GIZ - KfW, etc. which are or were active in the Diana region);

²⁶ EU catch and landings in Madagascar, exports of tuna cans to the EU compared to other markets, information on the supply chain of faux-poissons, revenues generated from the EU access, use of ancillary services in Madagascar by EU vessels, fisheries sector development in relation to EU fishing activities, etc.

- b. focus on improving the use of value chains using catches from EU vessels, which are not intended for the Malagasy cannery, for consumption by Antsirananans and populations being in regions near the Diana region with equity), through increased compliance with sanitary and trade rules, and market development;
- c. seek to support ancillary service sector companies, including local vessel maintenance, through business (commercial and financial) support;
- d. build human capacities of government and private sector individuals to support the integrated development project.

The consultant recommended to the MPEB, that in association with the local authorities in Antsiranana, it could design a brief concept note to present to different donors and NGOs and obtain their first reactions to providing funding to support the ideas presented above. **MPEB considered that as a good approach and agreed to prepare such a concept note for submission to potential future donors**²⁷. See Annex 6. The sectoral support of the current SFPAs in Madagascar could be also considered as a source of funding.

4. Consider the potential for similar territorial integrated development initiatives to attract large and small EU and non-EU longliners to land in ports in the south and the east of Madagascar (e.g. in Toamasina²⁸ and Ehoala ports). EU and foreign longliners usually do not land in Madagascar, however MPEB suggest investigating how part of their catch could be landed in Madagascar with a similar approach as the one proposed in Diego.
5. Carry out regular communication campaign to raise awareness among Malagasy State and non-State actors active in the fisheries and related maritime sectors on the SFPAs / Protocol terms, monitoring and implementation. Awareness campaign should focus, in priority, on a selection of coastal stakeholders (stakeholders in Diego for instance).

²⁷ This proposed integrated fisheries sector development support in the Diana region could be carried out with an “à la carte” approach by involving several technical and financial partners based on their current and future development portfolios and objectives, funding different elements of the integrated strategy.

²⁸ Tamatave also used in French

8.2 Maximising the potential of Sectoral Support to domestic fisheries value chains, gender equity, and food security (including through enhanced integration with international cooperation projects)

8.2.1 Conclusion

Positive

1. The Sectoral support interventions are based on, and coherent with, the Malagasy policy planning documents (section 4).
2. The content of the Sectoral Support as it currently stands is supportive of small-scale fisheries and food security. However, historically, MPEB used funds from the Sectoral Support mainly for fisheries surveillance and seafood safety activities.
3. Consultation by MPEB of non-State actors during the initial stage of the 2023 – 2027 Protocol negotiation was appreciated by non-State actors.

Negative

1. During the last stages of the SFPA - Protocol negotiation (first semester 2023), non-State actors were less consulted. Their consultations could have brought potential ideas for inclusion in the Sectoral Support matrix, for example based on the suggestions of support to develop the small-scale fisheries sector which were provided by participants during the study's July 2023 workshops – see Workshop report.
2. Coordination and integration of Sectoral Support funding with other donor support should be strengthened. There is a lack of regular ad hoc or official consultation coordinated by the Malagasy government and in particular MPEB to ensure optimal synergies between the different development interventions in the fisheries sector.
3. Budget allocation to strengthen Malagasy seamen employment is low (less than 1% of the total Sectoral Support budget – see Table 1)

8.2.2 Recommendations

Ensuring that Sectoral Support funding is planned and spent in a way that maximises support to small scale fisheries and food security could be achieved through greater integrated participation of small-scale fisheries actors in planning the use of funds, and in communication and transparency regarding the support being provided.

It is therefore recommended that:

1. Regular information and consultation meetings / workshops be held during the SFPA implementation to design the national sectoral development policies-strategies including the ones funded by the Sectoral support through a participatory approach. MPEB should continue²⁹ to use the FAO Voluntary Guidelines on Small Scale Fisheries when agreeing processes to involve small-scale fisheries interests, and when identifying activities to be supported in the Sectoral Support matrix.
2. While it is understood that the Sectoral Support focuses on key thematic (fisheries surveillance and seafood sanitary controls), some activities by axis of intervention and geographical location be designed where synergies with other development actors are possible (other TFPs and the civil society) in order to achieve results more rapidly and effectively (among other examples, designing integrated territorial development support in Diego in close association with the French – Malagasy cooperation initiative on maritime surveillance development).

²⁹ See donor agency section 3.5 on FAO to support MPEB in applying these voluntary guidelines.

3. Working and safety-at-sea conditions on board EU (and non-EU) fishing vessels active in Malagasy waters be improved through synergies with international cooperation projects on this key topic (support towards ratification and effective implementation of relevant international conventions such as the ILO C188, the STCW-F, the Torremolinos Convention ; contribution to training national seafarers applying a short and long term development approach at a national and maritime sea basin levels).
4. MPEB coordinates sectoral development by regular donor round-tables – at least once a year - with technical and financial partners and NGOs involved in the sector to ensure development synergies and share information and experience. Decentralised roundtables should also occur for instance, in Diego, by using the “multi-sectoral committee for fisheries and the blue economy in the Diana region”.
5. Donors and NGOs, involved and interested to get involved in the fisheries (and blue economy) sector meet on a regular basis – at least once a year – to ensure development synergies and share information and experience. The coordination and chairmanship of this exchange platform could rotate on an annual basis. These meetings could be additional the coordination meetings proposed by MPEB in the point above
6. Staff coordinating the Sectoral Support are regularly trained in project design and monitoring.
7. Indicators in the Sectoral Support matrix should be made SMART and include gender and social groups by age disaggregated data. Expected outputs and outcomes of the funding could then be better assessed and evaluated.
8. Institutions be supplied through the Sectoral Support with power generators (and/or other equipment to supply power from renewable energy sources). Operating costs to run this equipment should be budgeted by MPEB and / or by a donor agency (either the EU through the Sectoral Support funding or another financial partner / EU funded project).
9. Alike EU fisheries agreements, non-EU ones signed by Madagascar could include a Sectoral Support funding clause to increase the sectoral development synergy with the SFPA Sectoral Support (suggested by MPEB central services). Those budgets could then be directly channelled to MPEB while revenues from access rights are generally not and are therefore used for public investment outside the fisheries sector.

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Main laws and regulations relating to marine fisheries

- Law n° 2015-053 on the Fishing and Aquaculture Code
- Law n° 2018-026 recasting certain provisions of the law on the Fishing and Aquaculture Code

Other relevant laws and regulations

- Decree 2015-1309 on the implementation of the government's support to the fisheries health authority in carrying out official controls on fisheries products
- Decree N°2017-1023 regulating shipyard activities in Madagascar. Link: <https://www.apmf.mg/les-textes-regissant-le-droit-maritime>
- Decree n° 2005-376 creating the *Agence Malgache de la Pêche et de l'Aquaculture* (AMPA)

EU legal texts

- **Sustainable Fisheries Partnership Agreement (SFPA)** between the European Union and the Republic of Madagascar. Internet: https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CONSIL:ST_9007_2023_INIT latest access 9 July 2023
 - **Includes the 2023 – 2027 Protocol**
- Council regulation on the allocation of the fishing opportunities under the Protocol on the implementation of the Sustainable Fisheries Partnership Agreement between the European Union and the Republic of Madagascar (2023-2027). Internet: <http://data.europa.eu/eli/req/2023/1478/oj> latest access 4 August 2023
- Council decision on the conclusion of the Sustainable Fisheries Partnership Agreement between the European Union and the Republic of Madagascar and its implementing protocol (2023-2027). Internet: <http://data.europa.eu/eli/dec/2023/1476/oj> latest access 4 August 2023

Further reading – scientific articles, technical reports, online information, other

- Fisheries improvement projects:
 - Coordinated by the private industry in the tuna sector including EU purse seiners – SIOTI with the support of WWF: <https://fisheryprogress.org/fip-profile/indian-ocean-tuna-purse-seine-sioti>
 - By Spanish longliners fishing swordfish and blue shark in the Indian and Atlantic Oceans: <https://fipblues.com/en/fip-blues>
- Regional fisheries Management Plans (FMPs; abbreviation PAP in French)
 - PAP Diana: unpublished at the time of writing the report

Annex 1: National workshop report (in French)

NB: Power Point presentation attached separately

Atelier concernant l'accord de partenariat dans le domaine de la pêche durable (APPD) entre l'UE et la Madagascar (Antananarivo le 26 juillet et Diego le 28 juillet 2023)

COMPTE-RENDU

Présentation générale

Madagascar fait partie des pays partenaires tiers avec lesquels l'UE a depuis plusieurs décennies des accords de pêche. L'accord de pêche, signé en 2007, a été inactif et dit « dormant » du 1^{er} janvier 2019 au 30 juin 2023. Par ses protocoles de mise en œuvre, l'Accord permettait l'accès dans les eaux malgaches à la flotte de l'UE, des thoniers senneurs et des palangriers ciblant des thons tropicaux, et des espèces associées telles que l'espadon et, selon certaines conditions, certains requins dont la capture et la commercialisation sont autorisées. Son dernier protocole de mise en œuvre s'est appliqué du 1^{er} janvier 2015 au 31 décembre 2018. Depuis l'expiration de ce protocole, soit depuis le 1^{er} janvier 2019, les navires de pêche de l'UE ne pouvaient plus accéder à ces ressources dans les eaux de Madagascar, et ceci tant qu'un nouveau protocole de mise en œuvre n'était pas de nouveau signé (application de la clause d'exclusivité de l'Accord, en son article 6).

Des discussions et réunions techniques ont été menées entre Madagascar et l'UE représentée par la Commission européenne pour aboutir à l'application d'un nouvel accord de pêche dit accord de partenariat pour une pêche durable (APPD) et d'un nouveau protocole de mise en œuvre pour la période 2023 – 2027 et dont les signatures ont lieu à la fin du moins de juin 2023 pour une application provisoire des deux instruments internationaux le 1^{er} juillet 2023.

Le Ministère fédéral allemand de la coopération économique et du développement (le BMZ) a lancé en janvier 2022, et pour une durée de deux ans, un projet de recherche intitulé « Potentiels des Accords de partenariat pour une pêche durable (APPD) de l'UE et coopération au développement durable des secteurs locaux de la pêche » (2022 - 2023). Cette étude, en Afrique et dans l'océan Indien du sud-ouest, a pour objectifs d'identifier comment améliorer les retombées socio-économiques de ces APPDs et l'approvisionnement en produits halieutiques par les filières halieutiques locales dans les pays partenaires tiers, dont Madagascar, au travers de :

a) La composante « accès » des APPDs : c'est-à-dire par l'amélioration dans les pays tiers partenaires des activités de débarquement-transbordement-transformation-commercialisation des captures des flottes de l'UE flottes thonières actives dans le cadre des accords de pêche de l'UE, et des activités connexes (réparation – maintenance de navires, réapprovisionnement en carburants, embarquement de marins locaux, etc.) ;

b) La composante « appui sectoriel » des APPDs en accord avec les politiques de développement sectoriel des pays partenaires tiers (PTP), notamment du développement des filières halieutiques locales ; et

c) La synergie et l'intégration de ces APPDs avec d'autres interventions de coopération au développement sectoriel dans ces PTP, notamment dans un objectif de renforcer les emplois et la sécurité alimentaire dans les filières halieutiques locales.

BMZ a recruté le bureau d'études, Poseidon Aquatic Resource Management Limited (Poseidon ci-après) pour réaliser cette étude-recherche. M. Vincent Defaux, directeur de Poseidon a effectué deux missions à Madagascar pour recueillir et analyser des données et informations contextuelles du secteur pêche, des filières de produits de pêche et des secteurs connexes et consulter des organisations étatiques et non-étatiques (les acteurs

privés et sociétés civiles) œuvrant dans le domaine de la pêche, et dans une moindre mesure dans l'aquaculture.

Ainsi, deux ateliers techniques (d'une demi-journée) ont été organisés à Antananarivo et Diego (respectivement le 26 et 28 juillet 2023) avec une sélection de parties prenantes concernées pour présenter et échanger avec les participants :

- Des résultats provisoires des deux missions du consultant ;
- Des recommandations provisoires pour améliorer a) les retombées socio-économiques de l'APPD entre l'UE et Madagascar et b) la coopération au développement du secteur de la pêche notamment des filières halieutiques locales.

Ces ateliers ont été organisés sous l'autorité du Ministère de la Pêche et de l'Economie Bleue (MPEB).

Participation

Quatorze (14) personnes ont participé à la session d'Antananarivo et dix-huit (18) à celle de Diego, selon la répartition suivante :

<i>Entité</i>	<i>Antananarivo</i>	<i>Diego</i>	total
MPEB	6	2	8
Entités rattachées au MPEB	3	2	5
Organisations non-gouvernementales (ONG)	1	1	2
Partenaires Techniques et Financiers (PTF)	2	0	2
Autres acteurs	2	13	15
TOTAL	14	18	32

Pour l'atelier d'Antananarivo, les représentants d'un PTF, la KfW, ont participé virtuellement. La qualité vidéo-son n'était pas optimale mais les deux représentants ont pu suivre l'avancée de l'atelier.

Pour l'atelier de Diego, on souligne la forte représentation et participation active des représentants des autorités publiques locales (gouvernorat, préfecture et la commune urbaine de Diego). Ceci peut se traduire par la volonté des autorités étatiques locales à porter leurs appuis au développement de la filière pêche thonière de la région.

Déroulement de l'atelier :

Ordre du jour :

Rappel sur les points suivants :

- 1- Objectifs, livrables et activités clés de l'Étude
- 2- Principaux résultats et conclusions des missions 1 et 2 à Madagascar :

Situation, faiblesses, opportunités :

- Débarquements, utilisation – compétences des marins malgaches, activités connexes aux débarquements
- Filières halieutiques locales

- Situation de la programmation de l'appui sectoriel, activité réalisée sous l'étude BMZ, composante développement des filières halieutiques locales notamment,
- Sécurité alimentaire et liens avec les composantes accès et appui sectoriel de l'APPD
- Synergie avec d'autres interventions de partenaires techniques et financiers dont la société civile (ONG)

Cinq thématiques, sous forme de 5 questions, ont été abordés durant l'atelier conformément à l'ordre du jour. Il s'agissait de :

1. **Appui Sectoriel et pêche artisanale** - Comment accroître les avantages et quelles devraient être les priorités de l'appui sectoriel de l'APPD, en particulier en ce qui concerne le sous-secteur de la pêche artisanale ?
2. **Débarquements et sécurité alimentaire** - Comment améliorer la sécurité alimentaire grâce à l'augmentation des captures destinées à la consommation humaine dans le pays et dans la région, et comment l'APPD peut-il y contribuer ?
3. **Emplois et genre** - Comment l'APPD peut-il être mis à profit pour offrir d'avantage d'emplois et améliorer l'implication des jeunes et des femmes dans le secteur de la pêche ?
4. **Concertation avec / implication de la profession** - Comment l'APPD peut-il servir à améliorer la participation et l'inclusion des parties prenantes et des représentants de la pêche artisanale dans les processus de décision qui concernent leurs moyens de subsistance ?
5. **Complémentarité PTF** - Comment faire en sorte que les activités complémentaires des PTF puissent contribuer à maximiser les avantages des APPD pour Madagascar ?

Pour l'atelier de Diego (région DIANA), les participants ont été invité à se focaliser sur le développement de leur territoire en particulier (région de Diana).

Suite à cet exposé, les participants ont présenté des commentaires sur les points abordés (cf. présentation Power Point). Au besoin, des clarifications ont été apportées par les consultants.

Principales observations et recommandations

Les principales observations et recommandations résultant des deux sessions de l'Atelier sont synthétisées ci-après suivant les questionnaires :

Point 1 : En termes de bien-fondé de l'APPD :

Pour l'atelier d'Antananarivo :

- L'AS du précédent protocole est axé sur l'appui de l'Autorité Sanitaire Halieutique et le Centre de Surveillance de Pêche. Au sein du ministère en charge de la pêche, une unité de développement de la pêche et de l'aquaculture (UDPA), avec de l'appui vers la petite pêche (distribution de gilets de sauvetage, matériel de pêche). L'UDPA n'existe plus depuis janvier 2022 mais l'AS 2023 – 2027 continue d'axer une partie de ses interventions sur la petite pêche et pêche artisanale (donc axe prioritaire)
- Assurer une priorisation des activités par axe et zone géographique où des signes de synergie entre acteurs de développement existent pour aboutir plus effectivement à des résultats
- Recommandation par un participant d'intégrer à l'AS un appui sécurité maritime, par exemple en synergie avec la coopération franco-malgache, coopération qui est en

cours et travaille notamment sur l'opérationnalisation des chaînes de sémaphores. L'appui français recherche un financement pour un sémaphore à Mahajanga (pour son opérationnalité et la formation de guetteurs sémaphoriques, métier qui est ouvert aux femmes)

- Sur la question d'une éventuelle clause d'« obligation de débarquement », l'idée est de ne pas changer cette disposition en obligation de débarquement – à noter : pas de protocole à un accord signé avec l'UE ayant une telle clause d'après le Consultant. Il serait donc plus approprié d'améliorer l'attractivité du port de Diego pour le débarquement des thons capturés dans l'océan Indien et pour les activités satellites liées aux débarquements des thoniers (approvisionnement en sel, maintenance légère – réparation des navires et de leurs équipements dont leurs filets, rotation d'équipage, etc...) ;
- Remarque d'un participant : Le fond alloué au développement de la filière pêche artisanale et traditionnelle, est peu important par rapport au nombre des petits et les problèmes sur la gestion de la pêche pour le segment « petite pêche » ;
- Remarque de plusieurs participants : tenter d'élargir les membres de la commission mixte. → L'élargissement de la Commission mixte étant à la discrétion des deux parties signataires, en tant qu'alternative, des réunions avec la société civile devraient au moins avoir lieu avant et/ou après les réunions annuelles de Commission mixte comme cela eu lieu pendant la première phase de négociation de l'APPD en cours (année 2022).

Pour l'atelier de Diego :

- Demande des participants d'avoir au sein de l'AS des activités d'appui focalisées sur Diego et donc sur la région de DIANA, territoire où sont débarquées en partie les captures des thoniers senneurs de l'UE dans l'océan Indien de l'ouest ;
- Concernant l'appui au secteur petite pêche/ pêche artisanale :
 - Contribution de l'AS à la mise en œuvre des activités du Plan d'Aménagement des Pêcheries de la côte Est de la région DIANA
 - Développement de la Pêche Artisanale (PA) pour réduire la pression sur la zone de pêche côtière par l'utilisation de DCP ancrés (note un pilote à ce sujet dans l'AS 2023 – 2027)
 - Développement de la PA par la dotation embarcations motorisées, formations pratiques, équipements de chaînes du froid adaptés au contexte du coût de l'énergie (exemple équipements utilisant l'énergie solaire), renforcement de la sécurité en mer
 - Promouvoir – développer les activités de petite pêche – pêche artisanale hors des AMPs pour réduire la pression de pêche dans les AMPs
 - Individualité des dotations d'équipements pour que ce soit plus efficace (proposition de certains participants)
 - Création de plateforme des acteurs (conserverie, thonier, saline, vivres etc ...)
- Les participants émettent leurs souhaits d'inclure les représentants des acteurs de la filière thoniers de la région DIANA, aux membres de la commission mixte
 - → L'élargissement de la Commission mixte étant à la discrétion des deux parties signataires, en tant qu'alternative, des réunions avec la société civile devraient au moins avoir lieu avant et/ou après les réunions annuelles de Commission mixte comme cela eu lieu pendant la première phase de négociation de l'APPD en cours (année 2022).

Point 2 : En termes de sécurité alimentaire :Pour l'atelier d'Antananarivo :

- Contribution historique des protocoles des accords de pêche UE à des activités d'appui direct ou indirect à la qualité sanitaire des produits de pêche et aquaculture.
En effet, l'ASH est historiquement appuyée par les appuis sectoriels des accords de pêche avec l'UE. Pour rappel, l'ASH a pour mandat de contrôler les produits de pêche et aquaculture destinés aux marchés nationaux et à l'export (UE entre autres).
 - Contribution régulière des AS aux activités de surveillance des contaminants. Priorisation de ces activités à l'échelle régionale requise en raison des budgets pouvant être alloués tant par l'AS que par d'autres interventions de PTF.

Besoin d'identifier des mécanismes de financement durables pour assurer les activités d'ASH pour réduire la dépendance de l'ASH aux ressources extérieures (cas également pour le CSP).

- L'AS, ou une intervention d'un PTF, complémentaire ou non, devrait contribuer à la gestion des infrastructures utilisées par des communautés de pêcheurs pour aboutir à une gestion autonome locale. Pour cela, une synergie interministérielle est nécessaire notamment si ces infrastructures participent à la filière export de produits halieutiques – cette exigence est par ailleurs en lien avec la réglementation sanitaire des produits de pêche de l'UE qui exige que les points de débarquement, par lesquels transitent des produits de pêche destinés au marché de l'UE, soient correctement aménagés et répertoriés (=listés).

Note : actuellement, construction de certaines de ces infrastructures pour le développement de chaîne de valeurs (unités de froid et de transformation) par approche prioritaire du gouvernement / MPEB. L'appui de l'UE ou un autre PTF pourrait contribuer à leur opérationnalité par acquisition d'équipements complémentaires.

Pour l'atelier de Diego :

- En l'absence notamment d'une clause d'obligation de débarquement à Madagascar dans le Protocole, réaliser des activités de renforcement de l'attractivité de Diego et de la région de Diana pour optimiser les débarquements-transbordements, la transformation en conserves, les services auxiliaires (ravitaillement, maintenance, approvisionnement en sel, en marins, observateurs, etc.), ...Par exemple :
 - Renforcement de la capacité de production de la conserverie le cas échéant (= selon les attentes des opérateurs privés) ;
 - Maintenance des thoniers : répondre de manière optimale à la demande de la clientèle
- Promouvoir la consommation locale de produits halieutiques – filière faux-poissons, pourvoyeurs de protéines animales - objectif d'augmentation de consommation par habitant
- Améliorer à moyen terme la gestion de la filière des faux-poissons (étude), et appliquer les recommandations issues d'une telle étude
- Réaliser des appuis sur l'information – éducation – communication (IEC) sur l'hygiène et la salubrité sur la commercialisation – vente de produits halieutiques et l'amélioration des infrastructures et équipements de commercialisation – ventes (ex. marchés, gestion de l'accès à l'eau et des déchets tels que les eaux usées)

Point 3 : Emploi et implication des jeunes et femmes :Pour l'atelier d'Antananarivo :

- L'AS pourrait explorer le développement des AGR – activités génératrices de revenus pour la création d'emploi envers ces bénéficiaires
- Noter l'ouverture de la marine malgache aux femmes – postes d'officiers. Un appui en formations dans la marine malgache serait pertinent par l'AS ou d'autres PTF

Pour l'atelier de Diego :

- Appuyer le Centre de Formation Technique et Professionnelle SECREN SA (CFTPS) : collaborer avec le centre pour que l'APPD participe à l'insertion professionnelle dans le domaine de la pêche.

Exemples : formations à la construction d'embarcations en fibre de verre, ajout d'un cursus de formation pour promouvoir l'emploi dans le secteur de la pêche (jeunes, femmes notamment)

- Appui à la transformation – conservation de produits de pêche. Bénéficiaires potentiels incluant les femmes et jeunes, actifs dans ces filières ou susceptibles de le devenir : formation sur les techniques de transformation (fumage, séchage, salage), et acquisition d'équipements

Point 4 : Participation et inclusion :Pour l'atelier d'Antananarivo :

- Consultation régulière des parties prenantes, incluant la société civile et les PTF, primordiale pendant la phase de négociation et de mise en œuvre d'un protocole – pour améliorer l'inclusion et la participation de la société civile à la mise en œuvre de l'AS notamment. Le MPEB est invité à coordonner ces consultations.
- Mise à disposition au public d'informations portant sur la mise en œuvre de l'AS et de l'APPD dans son ensemble.

Pour l'atelier de Diego :

- Suivi de mise en œuvre du Protocole :
 - Intégration des parties prenantes de la région de Diana dans le suivi de mise en œuvre du Protocole. Utilisation de mécanismes de consultation – suivi existants ou à établir, exemple pour ceux existant : le comité multisectoriel pour la pêche et l'économie bleue de la région DIANA ; et les réunions annuelles de mise en œuvre de la Stratégie Nationale de la Gestion de la Pêche Thonière (SNGPT).
 - Sensibilisation des acteurs non-étatiques sur le mécanisme de suivi de mise en œuvre - par le partage d'informations publiques à ce sujet par exemple.
- Les parties prenantes de la région de Diana, dont les représentants d'acteurs de la petite pêche – pêche artisanale, regrettent qu'ils n'aient pas pu être invités lors de la préparation de la négociation de l'APPD et de son protocole entre la Commission européenne (représentant l'UE) et les autorités malagasy.

Point 5 : Complémentarité PTF :Pour l'atelier d'Antananarivo :

- Etudier une intervention de développement territorial intégré et durable sur Antsiranana et la région de Diana impliquant un ou plusieurs PTF et la société civile – « vitrine » d'appui localisé avec un budget assez conséquent pour aboutir à des résultats. Une note conceptuelle, ou un document équivalent, pourrait être élaborée pour cela. Pour certains participants, l'AS 2023 – 2027 ne devrait intervenir qu'à la marge dans un tel projet qui est spécifique.

- Collaboration avec les PTF et la société civile importante pour le développement efficace et en synergie du secteur :
 - Outil important entre autres : réunions régulières d'échanges entre les directions des ministères - PTF inter-secteurs maritimes – acteurs non-étatiques (ex. dans la mise en œuvre effective de la stratégie gouvernementale d'acquisition de patrouilleurs – vedettes) pour ensuite mettre en œuvre une stratégie maritime intégrée et structurante décidées lors de ces réunions
 - Utilisation des documents de planification du secteur de la pêche (PAP régionaux, PARAR) pour assurer cette synergie, la consultation des acteurs, l'amélioration et la diversification des revenus des pêcheurs [voir nouveau site internet MPEB actif depuis environ un mois : <https://www.mpeb.mg/> pour publication prévue de ces documents de planification).

Pour l'atelier de Diego :

- Surveillance des pêches et lutte contre la pêche INN :
 - Renforcement des capacités des agents de contrôle, surveillance communautaire (l'antenne CSP de Diego est invitée à consulter le personnel technique de la coopération franco-malgache sur la sécurité et surveillance maritime ou d'autres PTF)
 - Besoin primordial d'une pérennité dans la collecte - traitement – vérification des données de captures déclarées et de débarquement :
 - Besoin de moyens et ressources humaines compétentes et pérennes (volonté de certaines ONGs de contribuer à cette activité mais besoin de financement, le MPEB a sollicité certaines ONGs récemment à ce sujet). Rappel l'USTA occupait ayant ce rôle mais la structure n'existe plus depuis janvier 2022.
- Contrôle sanitaire des produits halieutiques à Diego: effectif faible, renforcement des capacités requis à hauteur des volumes de produits halieutiques commercialisés à Diego et sous la zone géographique sous le mandat de l'ASH de Diego
- Utiliser de manière optimale le cluster maritime de la région de Diana (le « Comité multi-sectoriel de la pêche et de l'économie bleue de la région de Diana ») notamment pour améliorer la gouvernance des fonds alloués à la pêche et à l'économie bleue.

Note : suggestion du consultant de rédiger une note conceptuelle pour le développement territorial et intégré de la région DIANA – élaboration de la note par le MPEB en collaboration avec les autorités locales en vue d'une éventuelle présentation auprès de PTF et d'ONGs pouvant contribuer à la mise en œuvre d'une telle intervention coordonnée par les autorités locales en étroite collaboration avec les autorités nationales de Madagascar.

Annexe au compte rendu – Listes de participants aux deux ateliers (Antananarivo et Diego)

Atelier concernant l'étude BMZ d'amélioration des retombées socio-économiques de l'accord de partenariat dans le domaine de la pêche durable (APPD) entre l'UE et Madagascar

Antananarivo, 26 juillet 2023

Nom	Organisme	Fonction
1 Vincent DEFAUX	Poseidon (consultant pour le BMZ)	Directeur
2 Tantely ANDRIAMAHARO	MPEB	Chef de Service de la Petite Pêche
3 Laurent Napoléon LAZARRI	Marine Nationale Malagasy	Chef de projet
4 Marolova RASOLOMAMPIONONA	MPEB	Collaborateur Service de la Pêche Maritime Industrielle
5 Naly RAKOTOARIVONY	ONG Bleu Ventures	Policy and Partnership
6 Mahefa Solofonirina RANDRIAMIARISOA	MPEB	Chef de Service de la Pêche Maritime Industrielle
7 Etienne BEMANAJA	MPEB	Directeur Général de la Pêche
8 Mirana ANDRIANALINERA	MPEB/AMPA	Directeur
9 Pierrot RANDRIAMIALIFIDY	MPEB/CSP	Chef de Service Opération
10 Lila Anica ANDRIATSIMBARISON	MPEB/UCORP (Unité de Coordination des Projets)	Directeur
11 Ndrina Patrick RANIRISON	MPEB/ASH	RSS SPPA
12 Vola RAKOTONJANAHARY	MPEB/Direction de l'Étude, Statistique et Planification	Directeur
13 Mark PREIN	KFW – services centraux	Conseiller technique
14 Sebastian MANTHEY	KFW – services centraux	Chargé du portefeuille de projets Madagascar

Excusés : représentants de la GIZ à Antananarivo, de la coopération allemande à l'Ambassade d'Allemagne à Antananarivo, et de la Délégation de l'Union européenne (DUE) à Antananarivo

Atelier concernant l'étude d'amélioration des retombées socio-économiques de l'accord de partenariat dans le domaine de la pêche durable (APPD) entre l'UE et Madagascar, Antsiranana, 28 juillet 2023

	Nom	Organisme	Fonction
1	Vincent DEFAUX	Poseidon	Director
2	Tantely ANDRIAMAHARO	MPEB	Chef de Service Petite Pêche
3	Andry RANDRIAMANANTENA	CSP Diego	Chef de Service
4	Romuald RAZAFINDRAKOTO	PFOI - conserverie	Responsable SHQ
5	Juliana RAMIANDRISOA	PFOI	Responsable Qualité
6	Solange RAZAFINDRAZAKA	ASH	Chef PISPPA (ASH)
7	Tsiolavina FRANÇOIS	SECREN	Conseil Technique
8	THEOGENE	Région DIANA	Directeur de Développement
9	Tafara Boris Aymar LUDOVIC	CU Diego	1 ^{er} adjoint au Maire
10	Emilien RANJASON	DRPEB DIANA	PRMP , interim DRPEB
11	Brice RATOVOALISON	AGL Madagascar	Directeur d'Agence
12	Aline DIZANO	CMDMD	Responsable commercial
13	Beriziky RACHIDA	COMADIE	Assistante RH
14	Hyacinthe RAZAFIMANDIMBY	CI DIANA	Directeur
15	Bezara DAVY	Région DIANA	Chef Service AET (Environnement, aménagement du territoire)
16	Ghislain Thierry BETKOU	DRPEB DIANA	Chef de Service
17	MANANJARA	Ets MANANJARA	Gérant
18	Lucien MANANJARA	Préfecture DIANA	Préfet

Absents mais excusés : RENAFEP DIANA et APMF DIANA (en mission à Tana)

Annex 2: List of processing plants approved to export fish and fisheries products to the EU (published on 23 May 2023)

Approval number	Name	City	Region	Activities
MAD 219 SV	ACIPENSER	Manjakandriana	Analamanga, Province d'Antananarivo	PP - Processing Plant
MAD 217 SV	AQUAFOOD	201 Antsiranana	Diana, Antsiranana Province	PP - Processing Plant
MAD 03-01 SV	Afroditi (Pechexport)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 03-03 SV	Agios Spyridon (Pechexport)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 126 SV	Aqualma	401 Mahajanga	Boeny, Province de Mahajanga	PP - Processing Plant
MAD 223 SV	BLUE OCEAN LTD TOLIARA	601 Toliara	Atsimo-Andrefana, Province de Toliara	PP - Processing Plant
MAD EF 16 SV	BLUEOCEAN LTD TOLIARA	569 Toliara	Atsimo-Andrefana, Province de Toliara	CS - Cold Stores
MAD 07-21 SV	Baie D'Ambaro (Crustapêche)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 07-22 SV	Baie De Boina (Crustapêche)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 07-04 SV	Cap St-André (Refrigépêche Ouest)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 07-01 SV	Cap St-Augustin (Refrigépêche Ouest)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 07-03 SV	Cap St-Sébastien (Refrigépêche Ouest)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 07-02 SV	Cap St-Vincent (Refrigépêche Ouest)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 07-05 SV	Cap Ste-Marie (Refrigépêche Ouest)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 178 SV	Captain Pablo	Mananjary	Vatovavy-Fitovinany, Province de Fianarantsoa	PP - Processing Plant

Approval number	Name	City	Region	Activities
MAD 199 SV	Copefrito (Compagnie De Pêche Frigorifique De Toliara)	601 Toliara	Atsimo- Andrefana, Province de Toliara	PP - Processing Plant
MAD EF 05 SV	Cructapêche	401 Mahajanga	Boeny, Province de Mahajanga	CS - Cold Stores
MAD EF 15 SV	ENTREPOT FRIGORIFIQUE PECHEXPOT	401 Mahajanga	Boeny, Province de Mahajanga	CS - Cold Stores
MAD EF 14 SV	ENTREPOT FRIGORIFIQUE USINE 2, PECHE ET FROID DE L'OCEAN INDIEN (PFOI)	201 Antsiranana	Diana, Antsiranana Province	CS - Cold Stores
MAD 06-03 SV	Fanantara (Refrigépêche Est)	501 Toamasina	Atsinanana, Toamasina Province	ZV - Freezer Vessel
MAD 16-01 SV	Fanjava I (Somapeche)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 16-02 SV	Fanjava II (Somapeche)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 16-03 SV	Fanjava III (Somapeche)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD-T 02 SV	Ile Sainte Marie	Ile Sainte Marie	Analanjrofo, Toamasina Province	ZV - Freezer Vessel
MAD 06-06 SV	Isandra (Refrigépêche Est)	501 Toamasina	Atsinanana, Toamasina Province	ZV - Freezer Vessel
MAD 16-13 SV	Jonobe 2 (Somapeche)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 16-09 SV	Jonobe 4 (Somapeche)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 16-10 SV	Jonobe 5 (Somapeche)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 104 SV	Le Martin Pêcheur	Taolagnaro	Anosy, Province de Toliara	PP - Processing Plant
MAD 218 SV	MANANJARA	201 Antsiranana	Diana, Antsiranana Province	PP - Processing Plant

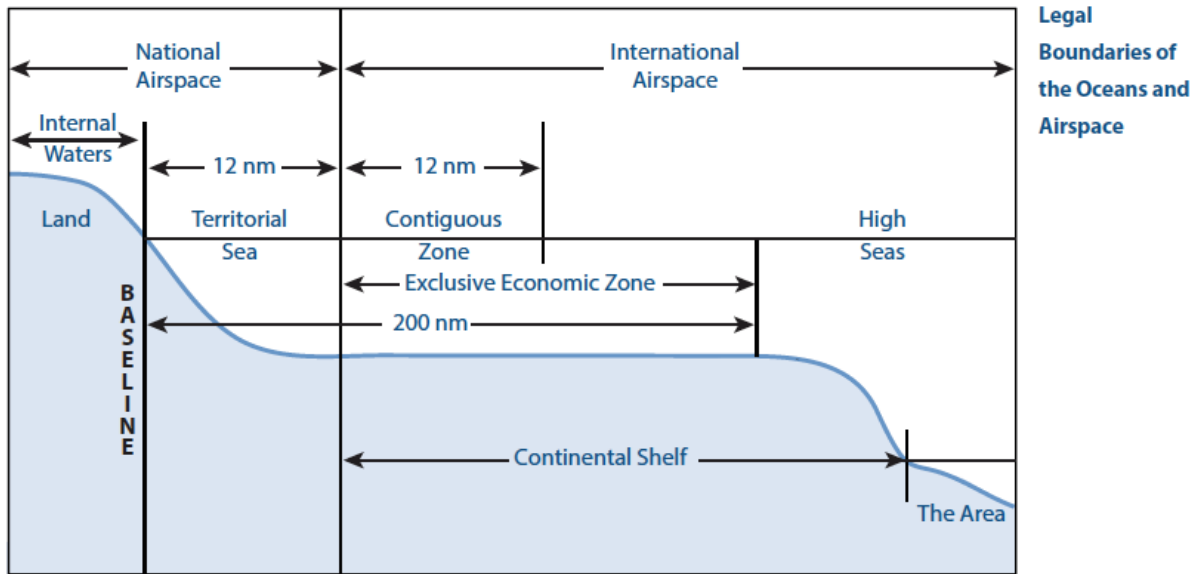
Approval number	Name	City	Region	Activities
MAD 208 SV	MANDA S.A.	105 Antananarivo	Analamanga, Province d'Antananarivo	PP - Processing Plant
MAD 213 SV	MARINA PEX (Marina Pêche Et Export)	Mananjary	Vatovavy- Fitovinany, Province de Fianarantsoa	PP - Processing Plant
MAD 210 SV	Malagasy Seafood Provider (MSP)	301 Fianarantsoa	Matsiatra Ambony, Province de Fianarantsoa	PP - Processing Plant
MAD 06-08 SV	Maningory (Refrigépêche Est)	501 Toamasina	Atsinanana, Toamasina Province	ZV - Freezer Vessel
MAD 06-02 SV	Masora (Refrigépêche Est)	501 Toamasina	Atsinanana, Toamasina Province	ZV - Freezer Vessel
MAD 51-02 SV	Melaky 2 (Pêchexport)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 51-03 SV	Melaky 3 (Pêchexport)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 90-05 SV	Melaky 7 (Pêchexport)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 90-06 SV	Melaky 8 (Pêchexport)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 16-06 SV	Menabe 8 (Somapeche)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 16-07 SV	Menabe 9 (Somapeche)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 203 SV	Murex International	601 Toliara	Atsimo- Andrefana, Province de Toliara	PP - Processing Plant
MAD 202 SV	NACB (nouvelle Aquaculture De Crevettes De Besalampy)	Besalampy	Melaky, Province de Mahajanga	PP - Processing Plant
MAD 01-02 SV	Nosy Be 10 (Aqualma)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 01-03 SV	Nosy Be 11 (Aqualma)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel

Approval number	Name	City	Region	Activities
MAD-T 01 SV	Nosy Be 5 (PNB)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 197 SV	OSO Farming- Les Gambas De L'Ankarana	201 Antsiranana	Diana, Antsiranana Province	PP - Processing Plant
MAD EF-08 SV	PFOI	201 Antsiranana	Diana, Antsiranana Province	CS - Cold Stores
MAD 111 SV	PFOI - Propriété Lamatra	201 Antsiranana	Diana, Antsiranana Province	PP - Processing Plant
MAD EF 11 SV	PFOI Propriete Lamatra	201 Antsiranana	Diana, Antsiranana Province	CS - Cold Stores
MAD 06-09SV	Rantabe (Refrigpeche-Est)	501 Toamasina	Atsinanana, Toamasina Province	ZV - Freezer Vessel
MAD EF 04 SV	Refrigepêche Est	501 Toamasina	Atsinanana, Toamasina Province	CS - Cold Stores
MAD 107 SV	Refrigepêche Ouest	401 Mahajanga	Boeny, Province de Mahajanga	PP - Processing Plant
MAD 209 SV	Refrigpeche-Est	501 Toamasina	Atsinanana, Toamasina Province	PP - Processing Plant
MAD 06-07 SV	Riandava (Refrigépêche Est)	501 Toamasina	Atsinanana, Toamasina Province	ZV - Freezer Vessel
MAD 200 SV	SMPM (Société Manakara Produits De Mer)	316 Manakara	Vatovavy-Fitovinany, Province de Fianarantsoa	PP - Processing Plant
MAD EF 10 SV	SOMAPECHE	401 Mahajanga	Boeny, Province de Mahajanga	CS - Cold Stores
MAD 222 SV	SOPEMO (Société de Pêcherie de Morondava)	Morondava	Menabe, Province de Toliara	PP - Processing Plant
MAD 03-07 SV	Santig Du (Pechexport)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 181 SV	Société De Pêches De Sainte Marie (S.P.S.M.)	Sainte-Marie	Analanjirifo, Toamasina Province	PP - Processing Plant
MAD 125 SV	Sogediproma	401 Mahajanga	Boeny, Province de Mahajanga	PP - Processing Plant

Approval number	Name	City	Region	Activities
MAD EF- 17 SV	Somapeche	401 Mahajanga	Boeny, Province de Mahajanga	CS - Cold Stores
MAD 221 SV	THALASSINA SEA FOOD	401 Mahajanga	Boeny, Province de Mahajanga	PP - Processing Plant
MAD 01-04 SV	Unima 1 (Aqualma)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 01-05 SV	Unima 2 (Aqualma)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 01-06 SV	Unima 3 (Aqualma)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 16-14 SV	Zova 1 (Somapêche)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 16-15 SV	Zova 2 (Somapêche)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 16-16 SV	Zova 3 (Somapêche)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 16-17 SV	Zova 4 (Somapêche)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 16-18 SV	Zova 5 (Somapêche)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel
MAD 16-19 SV	Zova 6 (Somapêche)	401 Mahajanga	Boeny, Province de Mahajanga	ZV - Freezer Vessel

Source: IMSOC – extracted on 14 July 2023 – link [here](#)

Annex 3: Maritime limits of a costal State - illustration



nm - nautical mile

Source: US University - The Fletcher School of Law and Diplomacy, Tufts University— link [here](#)

Annex 4: Proposed outlines to a document presenting the Sectoral Support programme – sent to AMPA by Poseidon

« Protocole 2023 - 2027 de mise en œuvre de l'APPD Madagascar - UE Présentation de l'appui sectoriel : introduction et justifications des activités programmées

Orientations annuelles et pluri-annuelle DOCUMENT DE TRAVAIL POUR L'AMPA

Structure version 1.0 [une dizaine de pages max.]

Introduction brève de l'APPD, du Protocole et de l'appui sectoriel (termes du Protocole – dont présentation des axes) – 2 pages max.

En accord avec l'article 8.2 du Protocole, le programme de mise en œuvre de l'appui sectoriel est présenté dans ce document. Il est arrêté au plus tard 3 mois après application provisoire du Protocole (art. 8.1 du Protocole).

IMPORTANT : intégration de l'appui sectoriel avec la – les politiques de développement de Madagascar et du secteur de la pêche et de l'économie bleue à la date de signature du Protocole

L'appui sectoriel du protocole à l'APPD prévoit des actions dans la mise en œuvre de la politique / des politiques de développement national de la pêche et de l'économie bleue.

L'objectif global est de contribuer à un développement « responsable et durable » du secteur de la pêche et de l'économie bleue³⁰.

Les axes d'intervention attendus et sur lesquels se sont mis d'accord les deux parties sont³¹ :

- La mise en œuvre de la stratégie nationale de gestion de la pêche thonière ;
- Le soutien à la pêche artisanale et traditionnelle ;
- La formation des marins pêcheurs ;
- Le suivi, le contrôle et la surveillance des activités de pêche et plus particulièrement la lutte contre la pêche illégale, non déclarée et non réglementée,
- Le renforcement de la recherche halieutiques et des capacités de gestion des ressources halieutiques
- La sécurité sanitaire des produits de la pêche.

Le montant annuel de l'appui sectoriel est de 1,1 million d'euros (source : Protocole paraphé).

Mécanisme de suivi : rapports annuels d'état d'avance soumis à la Commission mixte ; et bilan de mise en œuvre du Programme de l'appui sectoriel en dernière année du Protocole (art. 8 du Protocole) et d'indicateurs de suivi et résultats attendus par axe d'intervention. Les indicateurs de suivi sont, autant que possible, des indicateurs réalisation robustes, c'est-à-dire spécifiques, mesurables, atteignables, réalistes et temporellement définis (indicateurs « SMART » en anglais) - pour aboutir à des résultats concrets.

³⁰ Cf. article 8.2.2 du Protocole

³¹ Ordre dans le Protocole.

Sur la base des axes d'intervention inscrits dans le Protocole et de la matrice d'intervention pluriannuelle, le programme de l'appui sectoriel inclut les axes suivants avec justification de nouveaux axes ou d'axes modifiées à la marge :

- 1 Développement de la pêche côtière et artisanale
Justification : correspond à l'axe d'intervention « Soutien à la pêche artisanale et traditionnelle »

- 2 Développement de l'aquaculture (ajout comparé aux axes du Protocole)

Justification : en accord avec l'objectif global de mise en œuvre de l'appui sectoriel du Protocole et des objectifs de la stratégie nationale de l'économie bleue (à identifier)...

- 3 Promotion de l'économie Bleue

Justification : ...

- 4 Recherche halieutique, capacités de gestion des écosystèmes marins et ressources halieutiques

Justification : ...

- 5 Cadre légal, audit et lutte contre la corruption, campagne de communication

Justification : ...

[Proposition à approuver par les deux parties : l'UE et Madagascar

Cet axe d'intervention inclut également une ligne budgétaire permettant le paiement des frais de taux de change lors du transfert des tranches annuelles de des fonds de l'appui sectoriel et de frais bancaires entre comptes bancaires internationaux et nationaux]

... [jusqu'au 9]

L'axe d'intervention inscrit dans le Protocole « Mise en œuvre de la stratégie nationale de gestion de pêche thonière » est intégré dans l'axe d'intervention 4, autre, etc. (justifier)

Axe d'intervention 1 - Le soutien à la pêche artisanale et traditionnelle

Objectif de l'axe : xxx [à compléter par le personnel responsable de cet axe au sein du MPEB]

Objectif spécifique 1.1 : xxx

Activités sous l'objectif spécifique :

- 1. Action-pilote liée à l'amélioration des pratiques de pêche dans les villages sélectionnés**
- 2. Développement de la chaîne de valeur**

Justification des objectifs et des activités prévus sous cet axe :

xxx

Note provisoire (équipe d'intervention BMZ): les activités « participation aux réunions internationales » et « appui à la Direction de la Pêche » devraient de préférence être dans un ou des axe(s) autre(s) que celui-ci portant sur le développement de la pêche artisanale et traditionnelle.

Axe d'intervention xxx - xxx

Objectif de l'axe : xxx

Objectif spécifique 1.1 : xxx

Activités sous l'objectif spécifique : xxx

Justification des objectifs et des activités prévus sous cet axe :

...jusqu'au dernier axe d'intervention inclut dans la matrice pluri-annuelle

Annexes (option)

Détail par axe d'intervention sous différentes entités responsables »

Annex 5: Fish trade data from Eurostat

Figure 7: 160414 Prepared or preserved tunas, skipjack and Atlantic bonito, whole or in pieces (excl. minced) imported by the EU from Madagascar in quantity (tonnes)

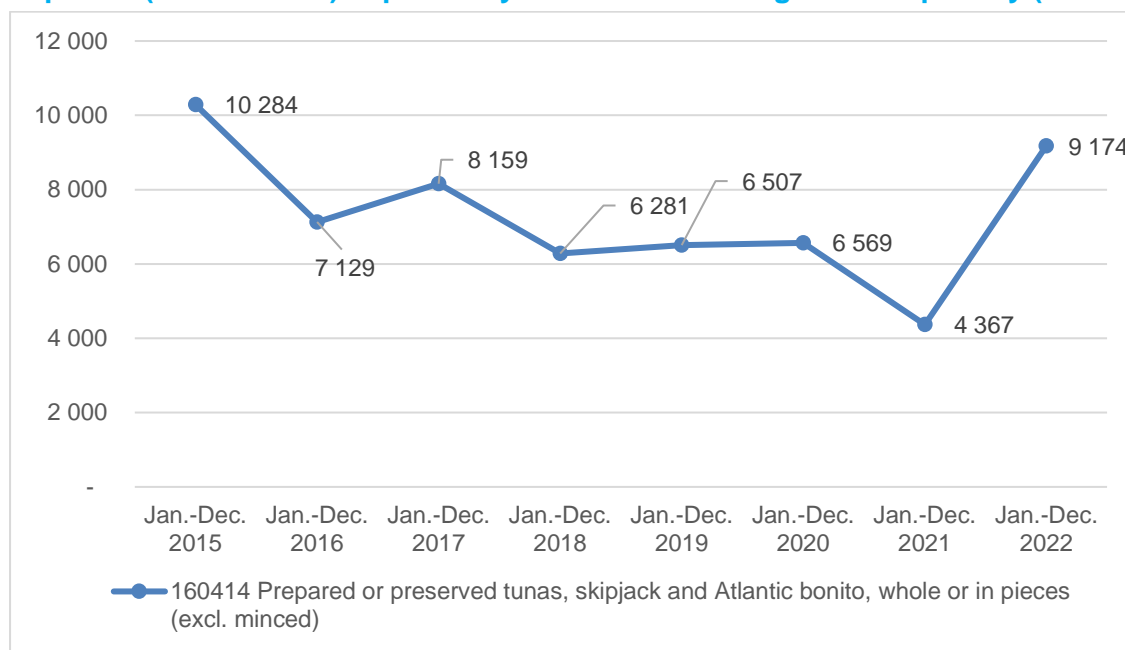
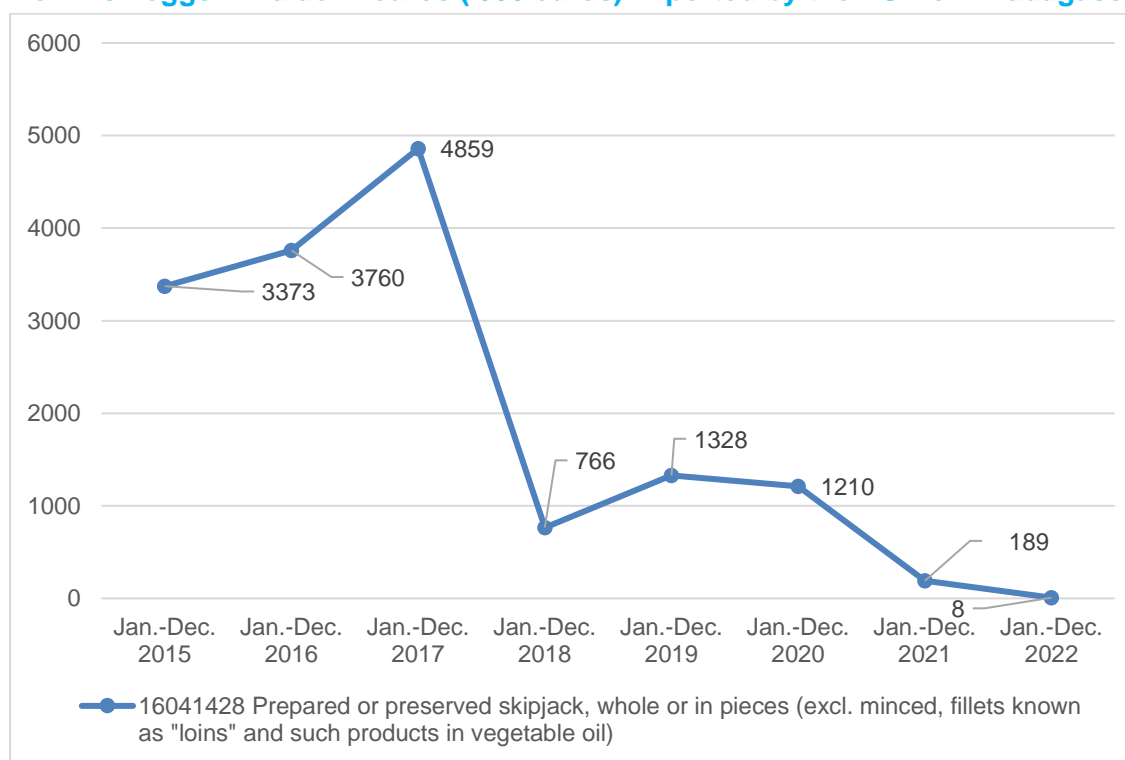
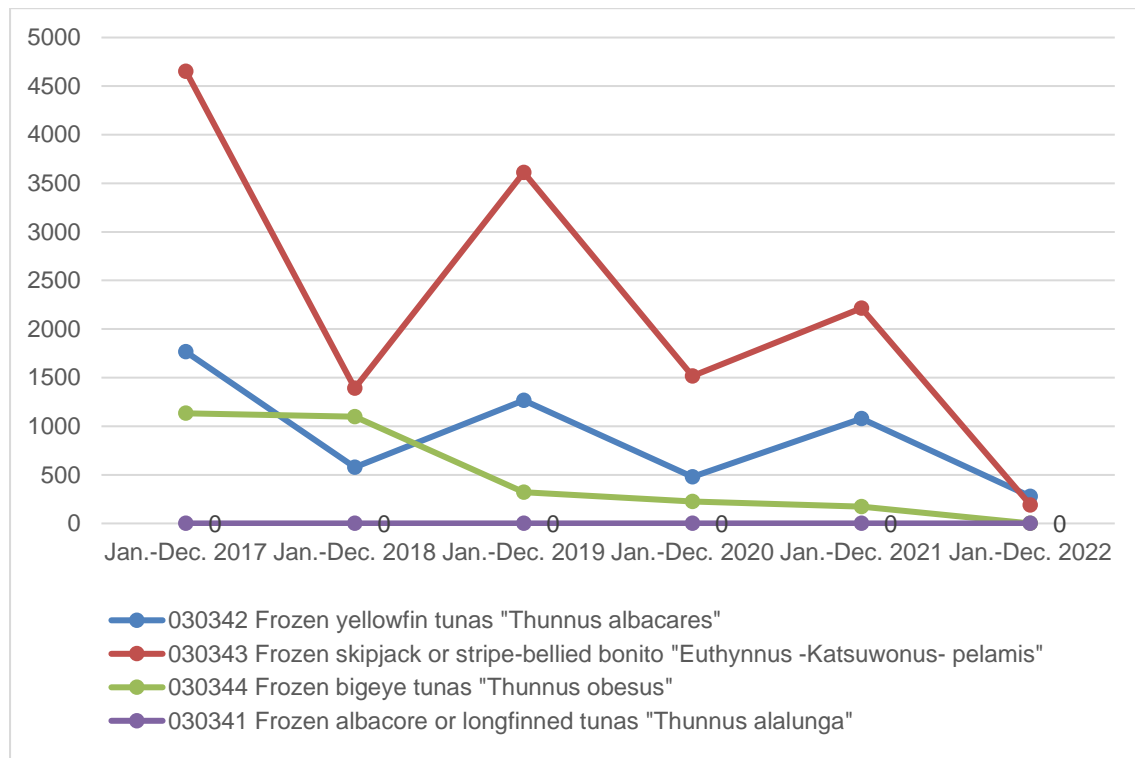


Figure 8: 1604 Prepared or preserved fish; caviar and caviar substitutes prepared from fish eggs in value in euros ('000 euros) imported by the EU from Madagascar



Source: Poseidon’s extraction of Eurostat – COMEXT data

Figure 9: Export of frozen whole tunas by the EU to Madagascar in tonnes from 2017 to 2022



Source: Poseidon’s extraction of Eurostat – COMEXT data

Annex 6: Concept note for possible project for donor support prepared by national consultant

CONCEPT NOTE – FIRST OUTLINES MADAGASCAR

Integrated territorial development of the DIANA region's fisheries sector (fisheries as fishing and aquaculture)

SECTION 1 - GENERAL INFORMATION ON THE PROPOSAL	
1.1 Title of proposed project : Territorial and integrated development programme for the fisheries sector in the DIANA region	1.2 Submission date dd/month/2023
1.3 Concept note submitted by Organisation: MINISTRY OF FISHERIES AND THE BLUE ECONOMY (MPEB) Name and title: to be completed later by the MPEB Address: Antananarivo, Madagascar Telephone/Fax/E-mail: to be completed later by the MPEB	1.4 Contact person Organised by: Direction de la Pêche /MPEB Name and title: Director under the supervision of Tantely Andriamaharo Ny Aina, Head of the Small-Scale Fishing Department Address: to be completed later by the MPEB Antananarivo Telephone/Fax/E-mail: mpeb.dp@gmail.com (cc : tantelyaina02@gmail.com)
1.5 Beneficiary organisation Organisation: GOVERNORATE OF THE DIANA REGION (and commune) Name and title: to be completed at a later date Address: to be completed at a later date Telephone/Fax/E-mail: to be completed at a later date	
1.6 Other implementing bodies Organisation: DIRECTION REGIONALE DE LA PÊCHE ET DE L'ÉCONOMIE BLEUE DE LA RÉGION DIANA (DIANA REGION FISHERIES AND BLUE ECONOMY DIRECTORATE) Name and title: to be completed at a later date Address: to be completed at a later date Telephone/Fax/E-mail: to be completed at a later date	
1.8 Type of sponsorship <input checked="" type="checkbox"/> Co-financing <input checked="" type="checkbox"/> Implementation support and/or technical assistance <input checked="" type="checkbox"/> Joint knowledge management / Communication ³² <input type="checkbox"/> Other	

³² Online communications, through workshops, local newspapers and radio - national communications on the programme, its activities and its results, including awareness-raising sessions on the activities of EU and non-EU tuna vessels in Malagasy waters, particularly in the waters off the Diana region (activities that could possibly be financed or co-financed by Axis 5 of the **sectoral support programme of the Protocol to the Sustainable Fisheries Partnership Agreement (SFPA) between the EU and Madagascar**).

<p>1.9 What is the main purpose of the project?</p> <p><input checked="" type="checkbox"/> Blue growth, including the fisheries sector (industrial, small-scale and artisanal), aquaculture and socio-economic activities ancillary to fisheries</p> <p><input checked="" type="checkbox"/> Fisheries governance</p> <p><input checked="" type="checkbox"/> Developing and improving value chains</p>	<p>1.10 Geographical scope of the project</p> <p><input checked="" type="checkbox"/> Region : DIANA</p> <p><input checked="" type="checkbox"/> Country MADAGASCAR</p>																																												
<p>1.11 Project duration</p> <p>24 Months</p> <p>Including initial funding over 4 to 6 months for the design phase with initial feasibility studies, leading to :</p> <p>Funding commitments, and drawing up and monitoring the programme of activities</p> <p>With the support of external technical assistance specialising in project/programme design</p> <p>Budget for design phase: 60,000 euros (in two tranches)</p> <p>-----</p> <p>If the Programme is approved, the full duration of the Programme is recommended, with</p>	<p>1.12 Summary budget To be defined after presentation of the draft form to technical and financial partners interested in principle in financing the programme or part of its activities (in the form of "à la carte" project(s) or under their own interventions).</p> <table border="1" data-bbox="560 763 1417 1424"> <thead> <tr> <th>SOURCE³³</th> <th>Total</th> <th>%</th> <th>Funds committed</th> </tr> </thead> <tbody> <tr> <td>Co-financier 1 - to be identified</td> <td>[Amount]</td> <td>[of total]</td> <td></td> </tr> <tr> <td>Co-financier 2 - to be identified</td> <td>[Amount]</td> <td>[of total]</td> <td></td> </tr> <tr> <td>And so on.</td> <td></td> <td></td> <td></td> </tr> <tr> <td>GIZ</td> <td></td> <td></td> <td></td> </tr> <tr> <td>KfW</td> <td></td> <td></td> <td></td> </tr> <tr> <td>AFD³⁴</td> <td>[...]</td> <td>[...]</td> <td>X</td> </tr> <tr> <td>Public authorities</td> <td>[Amount]</td> <td>[of total]</td> <td></td> </tr> <tr> <td>Total project cost</td> <td></td> <td></td> <td></td> </tr> <tr> <td><i>Sub-total activities already funded</i></td> <td></td> <td></td> <td></td> </tr> <tr> <td><i>Sub-total activities to be financed</i></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	SOURCE ³³	Total	%	Funds committed	Co-financier 1 - to be identified	[Amount]	[of total]		Co-financier 2 - to be identified	[Amount]	[of total]		And so on.				GIZ				KfW				AFD ³⁴	[...]	[...]	X	Public authorities	[Amount]	[of total]		Total project cost				<i>Sub-total activities already funded</i>				<i>Sub-total activities to be financed</i>			
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<i>Sub-total activities to be financed</i>																																													

³³ Guidelines for completion: total estimate of amounts committed to ongoing project(s) in the region over the same period by co-financer

³⁴ Total estimate of AFD activities within the programme, in particular the ongoing Franco-Malagasy cooperation project "Base de soutien de l'économie bleue à Madagascar", development

renewal every 24 months: 7 years (<u>long-term development approach</u> for the area).	
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SECTION 2 - ECONOMIC DATA FOR THE REGION

The DIANA region is in the northern part of Madagascar, bordered by the SAVA region to the east and SOFIA to the south.

It covers an area of 20,942 km² with a population of around 890,000 in 2018 and growing steadily (estimate by the Madagascar National Statistics Institute - INSTAT - in 2022).³⁵

Processing industries (sugar, salt, cocoa, tapioca, essential oil, tuna, shrimp, sheet metal, mattresses, etc.) are the companies established in the region.

The region also has the following seaports:

- Port of Antsiranana: for unloading fishery products (frozen tuna in particular), transshipment to a lesser extent, cargo/container (including frozen tuna), coastal shipping, cruises, ferries, tugs, ship repair services, bunkering, embarkation - disembarkation of seamen, salt works, etc.
- Port of Nosy Be: for coastal shipping, speedboats and ferries
- Port of Antsahampano: for tugs, launches and ferries
- Port Saint Louis (Antsohimbondrona): launch, ferry, tugboat

Two airports are operational: Arrachard (in the district of Antsiranana II) and Fascène airport (in the district of Nosy Be).

Roads and tracks :

Total length of roads: 2131 50 km

Asphalted trunk road: 401 50 km

National dirt road: 73 km

Asphalted provincial road: 90 km

Provincial dirt road: 857 km

Other surfaced roads: 36 km

Other dirt roads: 674 km

Regional road density (in relation to classified roads): 0.068 km/km²

National average density: 0.051 km/km²

Degree of isolation of the DIANA Region (61 communes) :

Chief towns of communes with full access (accessible 12/12 months): 32 (52.46%)

Chief towns of partially isolated communes (accessible 6/12 months): 24 (39.34%)

Chief towns of totally isolated communes: 05 (8.20%)

³⁵ Diana region in figures: <https://instat.mg/p/region-diana-en-chiffres-n01-decembre-2022>

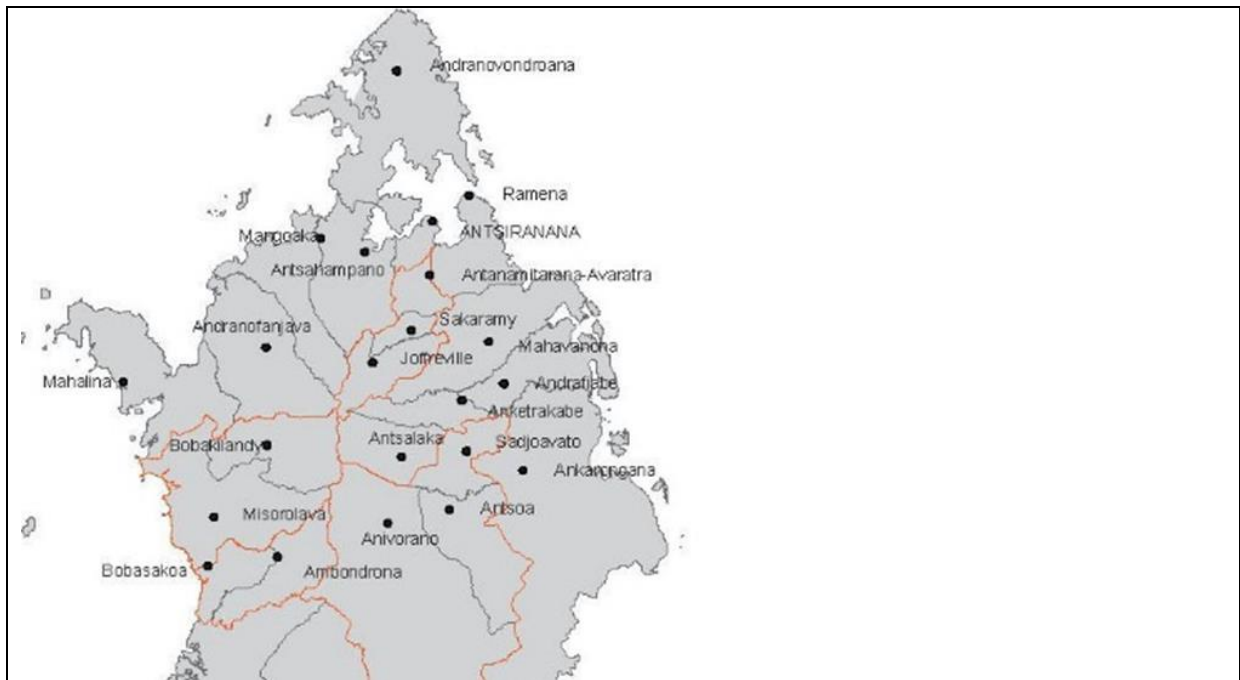


Figure 1: Administrative delimitation of the Diana region

SECTION 3: ECONOMIC SITUATION OF THE REGION

On the economic front, there is a lack of endogenous control of the regional economy due to the absence of an economic governance structure in the Region. The region's economy is dominated by the agricultural sector (cash crops, food crops, etc.) and there is currently a marked trend towards the development of rural tourism or ecotourism with related activities, including hotels, restaurants and the promotion of various tourist sites. The development of the industrial fabric is slowing down, as the region has not seen any new investors for over twenty years, due to the following problems:

- Low level of communication (poor road conditions, poor internet connection) ;
- Access and the rising cost of electricity ;
- Insecurity of land tenure, discouraging investment in the region.

The DIANA Region has stepped up its efforts to manage its terrestrial, marine and coastal environment, through partnerships with the various programmes and projects operating in areas recognised as being of benefit. It continues to set up and promote communal or regional nature parks, with the aim of conserving, restoring and enhancing natural sites, because the environment is an integral part of development.

Fishing industry :

In the fisheries sector, there is potential for development on the basis of sustainable objectives, both biological and socio-economic, the extent of which could be measured either in terms of the number of traditional fishermen, or in terms of small-scale fisheries production, or in terms of the development of the industrial sector (tuna fishing in Antsiranana) - including statistical indicators on the number of women working in the sector.

Traditional fishing :

It is carried out using very simple methods that fishermen have been used to for generations (nets, lines, scooping). It targets resources that are immediately available and easily accessible (fishing grounds not far from the coast). Products from this fishery are used primarily to supply local consumers with fresh fish, while products not consumed are processed on site (drying).

The proportion of self-consumption and production not integrated into controlled circuits remains unknown. The products most commonly caught are fish, prawns, lobsters, seafood and crabs. Artisanal fishing is carried out here using motorised boats, which make it possible to exploit resources that are inaccessible to traditional fishermen. In some cases, the best-equipped boats can also act as collectors for traditional fishermen. Crustaceans dominate this category of fishing. Only the sub-prefectures of Nosy Be and Antsiranana practice traditional, artisanal fishing.

Industrial fishing :

Two sectors and products are affected: shrimp and tuna.

The tuna industry involves canning (PFOI factory) and transshipment of tuna caught in the Malagasy Exclusive Economic Zone.

SECTION 4 - DESCRIPTION OF THE PROJECT / PROGRAMME

Objectives

The main objective of the project is to support the Region's development plan by improving the intermediate socio-economic spin-offs of the fishing sector through the territorial and integrated development of the fishing product sectors (import - export - local production) by involving all the representatives of the national and territorial public services concerned, with the support of interested technical and financial partners (funding through current, future and yet-to-be-identified projects).

The regional development objectives are listed below:

- To ensure the rule of law, good governance throughout the region and the security of people and property;
- Optimise the socio-economic benefits of exploiting all the potential of the fisheries;
- To ensure sustainable management of fisheries with a view to harmonious economic development and a better quality of life for the population of the Diana Region;
- Achieving food self-sufficiency (food security objective);
- Increase fishery products for export;
- Developing infrastructure.

❖ The expected impact of the project :

The main expected results include the following:

- Improved governance, particularly for the region's fisheries sector
- Improving the economic impact of fishing (and aquaculture) activities for the region
- Availability of fish products meeting hygiene standards for local consumption
- Improved human well-being for the region's fishermen (in terms of income and decent working conditions)

❖ The main components, activities and expected results of the project

Components

The programme will have three components:

Component 1: Improving fisheries management, restoring and protecting aquatic ecosystems to generate income (through fisheries diversification)

Component 2: Improving value chains for fisheries products and their access to the market

Component 3: Improving maritime safety for fishermen and reducing illegal fishing

Synergies and coherence - implemented in:

- Consistency with policies, plans and other documents aimed at the economic and social development of the Diana and Antsiranana regions, in particular the maritime spatial planning tool (PSM) for the DIANA region drawn up in 2022/2023;
- Synergies with current and future development projects and programmes in the region, in particular those of the EU (including the sectoral support activities of the EU-Madagascar sustainable fisheries partnership agreement in force since July 2023, the activities of KfW and GIZ, etc.).

SECTION 5 - PROJECT RISKS, FIDUCIARY RISKS AND INSTITUTIONAL ARRANGEMENTS

- ❖ Will the project entail any particular social risks? YES NO³⁶
- ❖ Will the project entail any environmental risks? YES NO
- ❖ Will the project entail other risks, including but not limited to political and financial risks?
 YES NO

SECTION 6 - ACTIVITIES, PRODUCTS, BUDGET**MAIN ACTIVITIES**

- Tuna and associated species landed in Diego ;
 - Improved management of the false tuna sector
 - Improving port services in connection with this tuna landing sector, taking into account the competition and complementarity of similar services in the south-west Indian Ocean.
- Improving the supply chains for fishery and aquaculture products destined for the DIANA region: all the chains concerned and players (fishermen - producers, processors, collectors, fishmongers, sellers)
- Development of value chains, in particular through the cold chain and the cured and smoked products sector
- Training and equipping traditional fishermen in the DIANA region
- Increased safety at sea (on board vessels and crafts)
- Fighting against IUU fishing
- Strengthening protected areas (marine protected areas)

IMPLEMENTING / COORDINATING ORGANISATIONS:

Local authorities: region, districts, mayors, villages

MPEB - *Ministère de la Pêche et de l'Economie Bleue (Direction Régionale de la Pêche)* - regional and central services including *Agence Malgache pour la Pêche et l'Aquaculture* (Malagasy Fisheries and Aquaculture Agency)

APMF - Maritime and River Port Authority - regional and central services

Other stakeholders involved in the fisheries sector active in the region: NGOs, seafarers' and sailors' unions, fishing industries and companies)

Representatives of ancillary industries involved in the supply of fishery products (tropical tuna and others)

³⁶ Social and political risks to be identified in order to help improve the *faux-poissons* sector from EU tuna seiners → A pre-feasibility study to be carried out during the programme design phase in close collaboration with the local Madagascar authorities and the regional departments of the Ministry of Ecology, Energy, Sustainable Development and the Sea (see below).

Activities in the Programme design phase:

- Review of projects / support programmes in the fisheries and port sector related to fisheries in the Diana region or whose beneficiaries are the inhabitants of the Diana region, ongoing, forthcoming, and under development, financed by German organisations (GIZ and KfW), Agence française de développement (AFD), projects financed by civil society (NGOs), etc.³⁷
- Based on the review and consultation of local and regional stakeholders, design of the overall programme of actions and activities, with identification of the development organisations interested in contributing, and development of the content of the programme by carrying out studies during the design phase (see studies below).
- Design of a programme to monitor activities and use: analysis of the context using situation indicators at the design stage of these development activities to monitor these indicators (e.g. indicators linked to employment).
- Identification of a fund to monitor and evaluate the programme
- Mechanism for auditing the use of funds (collaboration between Agence Malgache pour la Pêche et l'Aquaculture and technical and financial partners who have expressed an interest in carrying out the programme's activities).
- Studies to be carried out during the Programme design phase
- Analysis of the region's ports and their interrelations to improve landings of tuna fishing products: identification of needs, weaknesses and possible support measures by the public authorities with private co-financing for sustainable and integrated development throughout the Indian Ocean maritime basin (with a field visit to Mauritius and the Seychelles).
- Design of a project to improve repair and maintenance services for fishing vessels and other vessels in Diego to identify measures to support these services by the public authorities with private co-financing, taking into account the competition and complementarities of ship repair services in the western Indian Ocean.
- Design of a project for the sustainable improvement of the false tuna sector in Diego as part of a regional programme to improve the false tuna sector in the various countries of the Indian Ocean (taking into account the effects of reducing these by-catches with the help of other projects):
- Regional analysis of false tuna channels and their interrelationships (including the possible effects of increased port controls on changes in landings of these products)
- Preparation of an in-depth study of the false tuna and false fish sector, from landing to the various sales areas in the Diana region and neighbouring regions, analysis of the value chain and the sector's weaknesses.
- Identification and implementation of training for seafarers likely to be deployed on board tuna vessels (complementary activities to those financed by the sectoral support of the Protocol to the DPSA): preparation for the ratification of international conventions of the International Maritime Organisation IMO and the International Labour Organisation ILO (training standards for seafarers on board fishing vessels - STCW-F, ILO Convention C188 on board fishing vessels, etc.) and their application.

³⁷ Based on the final report of the BMZ 2022 - 2024 study on improving the socio-economic impact of fisheries agreements between the EU and third country partners - Madagascar case study, which lists current and future studies with support activities in Antsiranana and the Diana region in particular.



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Potentials of EU Sustainable Fisheries Partnership Agreements and development cooperation for the sustainable development of local fisheries sectors



SENEGAL case study report

Assignment for the German Federal Ministry for Economic Cooperation and Development (BMZ)

DECEMBER 2023

POSEIDON
AQUATIC RESOURCE MANAGEMENT

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ACRONYMS

AF	Artisanal Fishing
AFO	Artisanal Fishing Organisation
ANA	Agence Nationale de l'Aquaculture / National Aquaculture Agency
ANAM	Agence Nationale des Affaires maritimes / National Maritime Affairs Agency
BMZ	Federal Ministry for Economic Cooperation and Development / <i>Development/Bundesministerium für wirtschaftliche Zusammenarbeit und Entwicklung</i>
CEP	Cellule d'Études et de Planification / Studies and Planning Unit
CFP	Common Fisheries Policy
CLPA	Conseil Local de Pêche Artisanale / Local Artisanal Fishing Council
CNCPM	Conseil National Consultatif des Pêches Maritimes / National Advisory Council on Sea Fisheries
CNFTPA	Centre National de Formation des Techniciens des Pêches et de l'Aquaculture / National Training Centre for Fisheries and Aquaculture Technicians
COSAMA	Consortium Sénégalais des Activités Maritimes / Senegalese Maritime Activities Consortium
COSEC	Conseil Sénégalais des Chargeurs / Senegalese Shippers' Council
CRODT	Centre de Recherche Océanographique Dakar Thiaroye / Dakar Thiaroye Oceanographic Research Centre
DAGE	Département de l'Administration Générale et des Équipements / General Administration and Equipment Department
DGEFM	Direction de la Gestion et l'Exploitation des Fonds Marins / Directorate for Management and Exploitation of the Seabed
DIP	Département des Infrastructures Portuaires / Port Infrastructure Department
DITP	Direction des Industries de Transformation de la Pêche / Directorate for Fisheries Processing Industry
DPC	Direction des Pêches Continentales / Inland Fisheries Directorate
DPM	Direction des Pêches Maritimes / Directorate of Maritime Fisheries
DPSP	Direction de la Protection et Surveillance des Pêches / Directorate for Fisheries Protection and Surveillance
ENFM	École Nationale de Formation Maritime / National Maritime Training School
ERS	Electronic Reporting System
EU	European Union
EUD	European Union Delegation
FENAGIE PECHE	Fédération Nationale des GIE de Pêche / National Federation of Fishing Economic Interest Groups
GAIPES	Groupement des Armateurs et Industriels de la Pêche au Sénégal / Group of Fishing Shipowners and Processors in Senegal
ICCAT	International Commission for the Conservation of Atlantic Tunas

IF	Industrial Fishing
IFO	Industrial Fishing Organisation
ISRA	Institut Sénégalais de Recherche Agricole / Senegalese Agricultural Research Institute
JCS	Joint Scientific Committee
LPSDPA	Lettre de Politique Sectorielle et de Développement de la Pêche et de l'Aquaculture / Sectoral Policy and Development Letter for Fisheries and Aquaculture
MPA	Marine Protected Area
MPEM	Ministère de la Pêche et de l'Économie Maritime / Ministry of Fisheries and Maritime Economy
NA	Not Available
PAD	Port Autonome de Dakar / Dakar Port Authority
IUU(Fishing)	Illegal, Undeclared, Unregulated (Fishing)
REFEPAS	Réseau des Femmes de la Pêche Artisanale au Sénégal / Network of Artisanal Fishing Women in Senegal
SCA-SA	Société des Conserveries d'Afrique
SFPA	Sustainable Fisheries Partnership Agreement
SIRN	Société des Infrastructures de Réparation Navale
SMIC	Salaire Minimum Interprofessionnel de Croissance / Interprofessional Minimum Growth Wage
SOP	Socio-professional organisation
SS	Sectoral Support
SSP	Sector Support Programme
TFP	Technical and Financial Partner
UNAGIEM	Union Nationale des GIE de Mareyeurs / National Union of Mareyeurs Economic Interest Groups
UPAMES	Union Patronale des Mareyeur du Sénégal / Senegalese Fishermen's Association

1. Introduction

This report was prepared by Poseidon Aquatic Resource Management Limited, as part of a project to investigate the "Potential of EU Sustainable Fisheries Partnership Agreements (SFPAs) and development cooperation for the sustainable development of local fisheries sectors", hereafter referred to as "the Project". The Project was funded by the German Federal Ministry for Economic Cooperation and Development (BMZ).

The project considered all SFPAs between the European Union and Partner Third Countries (PTCs) **in Africa. Key research areas of interest** for the project were:

1. How to ensure increased levels of benefits from EU fleet activities in African countries, in terms of fish landings and employment, and contributions to food security and national socio-economic benefits?
2. How to design and implement the sectoral support component of SFPAs most effectively, in particular to support small-scale fisheries, gender equity and food security?
3. How to ensure that complementary activities by donors/development partners can contribute to maximising the benefits of the SFPAs?

Senegal was selected as one of the four priority countries for support and research in the country. Because it was agreed to include Senegal as one of the four countries later than the other three countries, the work completed in Senegal as the basis for this report was organized differently to that in the other countries. For Senegal, an international consultant did not complete any missions to the country, but undertook desk-based work only. A limited amount of field-work was however undertaken by a national consultant, Ms. Minata DIA, contracted by and under the supervision of POSEIDON for this purpose. The field work provided an opportunity to identify and meet the main stakeholders involved in negotiating and/or implementing the SFPAs in Senegal, but the reduced level of inputs to the work in Senegal necessarily mean that the case study report is slightly different in scope and organisation to the case study reports for The Gambia, Madagascar, and Mauritania.

The interviews with stakeholders nevertheless enabled investigation to:

- Identify the strengths and weaknesses of the 2019-2023 SFPAs with Senegal, taking into account the objectives of the Common Fisheries Policy;
- To obtain their assessment of the way in which the European Commission and Senegal are managing the SFPAs in terms of access to resources and support for Senegal's sectoral fisheries policy;
- Identify the existence or not of specific constraints concerning the "embarkation of seafarers from Senegal/ACP countries" aspect and, if necessary, propose improvements in this respect;
- To provide information on the availability of landings of all or part of catches in Dakar and, where appropriate, to define ways of increasing them;
- To make recommendations on what might need to be improved/changed in relation to the current Protocol if it were to be renewed;
- Other comments on the SFPAs with Senegal.

The data collection work was coordinated by the Ministry of Fisheries and Maritime Economy (MPEM), whose agents actively engaged with the collection of primary and secondary data. The Director of Maritime Fisheries, Mr. Diène Faye, took all the necessary steps to ensure that the study ran smoothly, namely:



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- The appointment of Mr. Ibrahima DIOUF, Head of the Industrial Fisheries Division, as focal point for the Study;
- Preparing and signing a letter of introduction from the national consultant (see the consultant's letter of introduction **in Appendix 1**; and
- Appointments harmonized by the executive assistant.

The interviews provided an opportunity for interactive discussions with stakeholders. Of the 24 people interviewed, two were women. Face-to-face interviews were held with 20 people between 17 July and 9 August 2023 (see the list of stakeholders consulted and the schedule of meetings **in Appendix 2**). For the other four stakeholders, data were collected either by email or by telephone.

The Figure 1 shows the map of the Republic of Senegal.

Figure 1: Map of the Republic of Senegal



Source : UN Geospatial [senegal_4174_r3_jan04 \(2\).pdf](#) (copyright United Nations)

2. Overview of the SFPA and Protocol

The Protocol implements the Sustainable Fisheries Partnership Agreement (SFPA)¹ for a tacitly renewable period of 5 years, from November 2019 to November 2024.

This Protocol concerns access to certain highly migratory species (tuna and associated species) present in the Senegalese fishing zone for EU tuna vessels divided into three categories (tuna seiners, pole-and-line vessels and surface longliners) and access to certain deep-water demersal species (hake) for trawlers. It is therefore, like the SFPA with The Gambia, a tuna fishery agreement with a limited demersal component, the main features of which are set out in Table 1 below.

In terms of fishing opportunities, the Protocol provides for simultaneous access for a maximum of 45 EU fishing vessels (43 tuna vessels and 2 trawlers) to waters under Senegalese jurisdiction, as well as EU support for the implementation of the national sectoral policy. The total estimated value of the Protocol is €15,253,750 over the 5 years, i.e. €3,050,750 per year, including i) €1,700,000 per year as financial compensation (€800,000 as financial compensation for access to resources, including an amount equivalent to a reference tonnage for highly migratory species of 10,000 tonnes per year); and a specific amount of 900,000 euros per year, as support for the implementation of Senegal's sectoral fisheries policy ("Sectoral Support") and ii) 1,350,750 euros per year, corresponding to the estimated amount of fees payable by shipowners for fishing authorisations issued.

Table 1: Summary of the main technical and financial features of the Protocol

Duration of the SFPA / Protocol	Five years, tacitly renewable
Date of entry into force of the Protocol	18 November 2019 (provisional signature)
Maximum number of EU vessels authorised	<ul style="list-style-type: none"> • 28 tuna seiners • 10 pole-and-line tuna vessels • 5 tuna surface longliners • 2 demersal trawlers
Authorised species	<ul style="list-style-type: none"> • Tuna vessels : Highly migratory species • Demersal trawlers : Black hake (<i>Merluccius senegalensis</i> and <i>M. polli</i>) and a maximum of 15% cephalopods, 5% crustaceans and 20% other deep-water demersal fish as by-catch.
Catch limit	<ul style="list-style-type: none"> • Tuna vessels: reference tonnage of 10 000 tonnes per year • Black hake: 1 750 tonnes per year
Annual EU financial contribution	<ul style="list-style-type: none"> • 1,700,000 euros : <ul style="list-style-type: none"> ➢ 800,000 for access to resources ➢ 900,000 « Sectoral Support »

¹ Protocol on the implementation of the Sustainable Fisheries Partnership Agreement between the European Union and the Republic of Senegal. OJ L299/13 of 20/11/2019.

Shipowners' contribution

Tuna vessels

- Tuna seiners: EUR 80 per tonne caught in the zone (years 1 to 3), EUR 85 (years 4 and 5)
- Pole-and-line tuna vessels and longliners: EUR 75 per tonne

Demersal trawlers

- 95 EUR / tonne

With regards to the Access component, Table 2 presents the authorisations for EU vessels under the Protocol during the period 2020-2023.

Table 2: Authorisations for EU vessels under the Protocol during the period 2020-2023

Year	2020		2021		2022		2023		Opportunities Protocol
	ES	FR	ES	FR	ES	FR	ES	FR	
Tuna Purse Seiner	10	9	10	10	9	10	7	5	28
Tuna Pole-and-line	7	1	4	1	3	1	3	1	10
Tuna Surface Longliner	2	0	1	0	0	0	0	0	5
Black Hake Trawler	2	0	2	0	2	0	3	0	2
Support vessel	3	0	ND	ND	2	0	2	0	NA

Source: Compilation from DG MARE Unit B3 data. ES = Spain, FR = France

Overall, the fishing authorisations:

- Have reduced for all tuna vessel categories over the course of the Protocol (although 2023 is not yet finished so additional authorisations may be provided this year;²)
- Were stable for black hake trawlers during 2020-2022 with an increase in 2023;
- Have been considerably below the fishing opportunities for all categories except for demersal trawlers.

With regards to Sectoral Support objectives and processes:

Article 5 of the Protocol defines Sectoral Support (SS) in the following terms:

"1. The sectoral support provided for under this Protocol shall contribute in particular to the implementation of Senegal's Sectoral Policy Letter for the Development of Fisheries and Aquaculture (2016-2023) and to the development of the maritime economy.

Its objectives are :

- Sustainable resource management ;
- Improved monitoring, control and surveillance of fishing activities;
- Developing scientific capacity, research on fisheries resources and data collection;
- Support for small-scale fishing ;
- Development of aquaculture ;
- Promotion, control and health certification of fishery products;
- Capacity building of players in the sector.

2. The first instalment of sectoral support is paid once the multiannual programme has been validated by the Joint Committee.

² The decrease of the pole-and-line has in particular been linked to the issue of livebait supply. See **Appendix 6**.

3. The Joint Committee shall determine the objectives and estimate the expected benefits of the projects in order to approve the allocation of the amounts of the financial contribution for sectoral support by Senegal. It may, if necessary, revise the terms of implementation of the sectoral support.
4. Each year Senegal shall submit an annual progress report on the projects implemented with sectoral support funding, which shall be examined by the Joint Committee. A final report will also be drawn up by Senegal when this Protocol expires.
5. The financial contribution for sectoral support shall be paid in instalments, on the basis of an approach based on an analysis of the results of the implementation of sectoral support and the needs identified during the multiannual programming period. The sectoral support provided for in point (b) of the first indent of Article 4(1) may be suspended in the following cases: where the results obtained do not comply with the programming following an evaluation carried out by the Joint Committee or where the financial contribution is not committed in accordance with the agreed programming.
6. Payment of Sectoral Support shall resume after consultation and agreement between the Parties and/or when justified by the results of the financial implementation referred to in paragraph 4. However, it may not be paid more than six months after the expiry of this Protocol.
7. Any proposal to amend the multiannual sectoral support programme shall be approved by the Joint Committee, where appropriate by an exchange of letters.
8. The Parties shall ensure the visibility of the achievements of sectoral support.

The Table 3 gives indications on the various projects planned for funding by the SS during the 5 years of the Protocol:³ From a total of about EUR 4.575 million (i.e. the 0.8 million EUR per year indicated in the Protocol), Axis 1: Sustainable management of fisheries resources and habitat restoration dominates the planned spending and accounts for 75% of the total amount. Axis 4: Strengthening human capital and Axis 5: Supervision and Coordination account for about 9% each; AXIS 2: Valorization of fishery and aquaculture products and AXIS 3: Develop competitive aquaculture account for about 4% each. Nearly half the amount (47% is dedicated to small scale fisheries, and 21% is geared at Food Security – issue of concern/focus in this study). The number of projects or interventions is relatively high (22 projects for the period), and the average amount per project/intervention is relatively limited (around EUR 200 000).

³ Source: MPEM. APPD Sénégal – Union Européenne (2019 - 2024): Matrice de l'appui sectoriel. 2 août 2021.

Table 3: Amounts of the various projects funded by the SS during the 5 year Protocol, in FCFA

AXIS	Project	Total amount - 5 years (FCFA)	Amount beneficial to small scale fisheries (FCFA)	Amount contributing to Food Security (FCFA)
AXIS 1: Sustainable management of fisheries resources and habitat restoration	Project 1.1: Support for cleaning up the seabed	57.132.000	0	0
	Project 1.2 : Fisheries socio-economic survey	53.300.000	53.300.000	0
	Project 1.3: Construction and supply of Surveillance Centres	144.000.000	144.000.000	0
	Project 1.4: Improving tuna fisheries management	279.531.426	0	279.531.426
	Project 1.5: Improving hake fisheries management	238.180.588	0	0
	Project 1.6: Managing the capacities of small-scale fisheries	37.722.280	37.722.280	37.722.280
	Project 1.7: Assessment of the present computation system for industrial licences	22.000.000	0	0
	Project 1.8: Implementation of a management system for fisheries statistics	49.590.000	0	0
	Project 1.9: Stocking of the Pattowel marigot	39.600.000	39.600.000	39.600.000
	Project 1.10: Improving the safety of artisanal fishermen	300.000.000	300.000.000	0
	Project 1.11: Renewal of the Fisheries Observer Program	47.000.000	0	0
	Project 1.12: Implementation of surveillance (aerial and participatory)	351.500.000	351.500.000	0
	Project 1.13: Support to fisheries research	614.720.200	0	0
	Project 1.14: Construction of the Ndangane Sambou fishing quay	20.220.811	20.220.811	0
	Total Axis 1		2.254.497.305	
AXIS 2: Valorization of fishery and aquaculture products	Project 2.1: Safeguarding national export certification	120.000.000	120.000.000	
	Total Axis 2			120.000.000

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AXIS 3: Develop competitive aquaculture	Project 3.1: Implementation of a catfish production centre	104.278.406	0	104.278.406
	Total Axis 3	104.278.406		
AXIS 4: Strengthenin g human capital	Project 4.1: Capacity-building for small-scale fisheries	159.000.000	159.000.000	159.000.000
	Project 4.2: Capacity building of the CNFTPA	61.000.000	61.000.000	0
	Project 4.3: Strengthening the ENFM's means of intervention	44.425.600	0	0
	Total Axis 4	264.425.600		
AXIS 5: Supervision and Coordination	Project 5.1: Evaluation of the SFPA 2020-2024	26.750.000	13.375.000	0
	Project 5.2: Planning support	143.051.964	71.525.982	0
	Project 5.3: Communication	88.000.000	44.000.000	0
	Total Axis 5	257.801.964		
TOTAL in FCFA		3.001.003.275	1.415.244.073	620.132.112
TOTAL in equivalent EUR (*)		4.575.000	2.157.526	945.385
(*) 1 EUR =			655,957	
% Total		100	47,2	20,7

3. Stakeholders

3.1 National stakeholders

Government

The Ministry of Fisheries and Maritime Economy (MPEM) is responsible for managing the fisheries and aquaculture sector. In accordance with the guidelines of the LPSDPA 2016-2023, the mandate of the MPEM was redefined in 2017⁴ to include, in addition to fisheries and aquaculture, the exploitation of the seabed, maritime transport and port management. To implement the policies within its remit, the MPEM is organised into several technical directorates:⁵⁶

- The Directorate of Maritime Fisheries (DPM); The DPM is the European Commission's focal point for aspects relating to the implementation of the Protocol. Its main mission is to design and implement the State's maritime fisheries policy (industrial and small-scale fisheries). As such, the DPM is responsible for managing fishing licences, monitoring catches and defining technical operating procedures in Senegal's fishing zone. The DPM also monitors the various access agreements concerning Senegal, including the agreements concluded with other countries in the sub-region which allow Senegalese vessels access to zones under the jurisdiction of third countries (in particular Cabo Verde, Mauritania, Guinea Bissau, Liberia and Gambia; see section 3.1).
- The Directorate for Fisheries Protection and Surveillance (DPSP); The DPSP is the competent authority for the monitoring, control and surveillance of fishing activities, as well as for matters relating to safety at sea. The DPSP also manages the catch certificates required for imports into the EU under Regulation (EC) 1005/2008. To carry out its missions, the DPSP has a Fisheries Surveillance Centre (CSP) in Dakar equipped with satellite (*Vessel Monitoring System - VMS*) and AIS (*Automatic Identification System*) vessel tracking systems; 10 coastal stations equipped with radar and communication systems; maritime patrols are carried out by the French Navy, which deploys its naval resources with the participation of DPSP inspectors. In addition, the MPEM launched in 2022 the operational upgrade of six intervention boats. Aerial surveillance is provided by the DPSP in collaboration with the French Elements in Senegal (EFS) and by the Senegalese Air Force, which has acquired a multifunction aircraft for the fight against IUU fishing. A team of agents and observers tasked with boarding fishing vessels for monitoring and control purposes (in 2022, there were 47 observers in total). Finally, participatory surveillance is carried out in coastal monitoring sub-centres.

In 2022, 1 261 inspections and/or controls were carried out at quay by the brigade's teams that ensure permanent monitoring and control of all vessels calling at the port of Dakar, in accordance with the 2009 FAO Port State Measures Agreement (80% of these inspections are on Senegalese vessels, 8% on Spanish ones and 5% on

⁴ Decree no. 2017-1582 of 13 September 2017 on the powers of the Minister for Fisheries and the Maritime Economy.

⁵ The main technical departments of the MPEM concerned by the DPSP were met face-to-face during the Study - see Appendix 2.

⁶ Source of the 2022 indications: MPEM. Revue sectorielle 2022 - Édition 2023 (version provisoire).

Chinese ones) In 2022, 575 maritime missions were carried out, during which 262 vessels were inspected, as well as 32 air missions, (660 vessels identified, 11 of which were in violation).⁷ Finally, 854 participatory maritime patrols were carried out, for the control of 8 693 pirogues (756 of which were seized). In 2022, observers boarded European pole-and-line and hake vessels and Senegalese seiners (47 embarkations in total).

- The Directorate for Fisheries Processing Industry (DITP): The DITP is the competent authority for health inspection and certification of fishery products. Given the economic importance of exports of these products, the DITP is a key administration in Senegal's macro-economic landscape. The DITP has inspectors, who work at all the country's landing sites. The DITP does not have a specialised analysis laboratory, but can rely on 3 approved private laboratories. For exports to the EU, the DITP manages a portfolio of health approvals for 134 land-based units (of which 89 certified to export to the EU) and 124 vessels (of which 87 certified to export to the EU).⁸ Under EU rules, the DITP must also certify fishery products landed or transhipped in the port of Dakar by EU vessels.
- The Directorate for Management and Exploitation of the Seabed (DGEFM);
- The Inland Fisheries Directorate (DPC);
- The Port Infrastructure Department (DIP);
- The General Administration and Equipment Department (DAGE).
- The MPEM also has a General Secretariat, a Studies and Planning Unit (CEP) and a procurement department. The MPEM also supervises the National Maritime Affairs Agency (ANAM), which is responsible for monitoring seafarers. The MPEM is not responsible for scientific research.

Fisheries research in Senegal is the responsibility of the Centre de Recherche Océanographique de Dakar-Thiaroye (CRODT). CRODT is attached to the Institut Sénégalais de Recherche Agricole (ISRA), which comes under the Ministry of Agriculture. CRODT therefore has no organic link with MPEM.

CRODT has a team of around hundred people, including 10 to 12 researchers. CRODT has a centre in Dakar and regional offices to monitor fisheries in the main landing sites. For its campaigns at sea, CRODT uses the oceanographic vessel Itaf Deme, a 37 m vessel equipped for trawling and with the autonomy to remain at sea for several weeks. The N/O Itaf Deme was donated in 1999 by the Japanese Cooperation to the MPEM, which owns it and makes it available to CRODT.

ISRA provides funding for CRODT's basic operations (staff salaries, premises). The MPEM is responsible for funding research investment and operations (sea campaigns, field operations) through multi-annual performance contracts that define a work plan and the associated funding to be provided by the MPEM.

⁷ Source: MPEM. Revue sectorielle 2022 - Édition 2023 (version provisoire).

⁸ Same source as above.

Private sector - EU shipowners' agents

The category of agents of EU vessels, includes companies that support the activities of EU fishing vessels in Senegal. The companies met are as follows: ⁹

- ALTAMAR SA, for Spanish pole-and-line tuna vessels;
- SOCOTRA (Société de Consignation et de Transport);
- SSCM (Société Sénégalaise de Consignation et de Manutention), for Spanish purse seiners.

These companies are of interest to the Study in more ways than one. They represent the owners of EU vessels in accordance with the Protocol, which stipulates in Chapter 1 of the Annex, point 4 Designation of a shipowner's agent: "All EU fishing vessels operating in Senegalese fishing zones must be represented by an agent resident in Senegal. They manage the vessels (reception, orientation, supplies, etc.)".

National sector representation and fisheries-related NGO

This category includes the sub-category of Professional Fishing Organisations (PFOs) in Senegal. These PFOs are the legal stakeholders in everything to do with fishing in Senegal (articles 5 and 6 of the Law on the Fishing Code). Their leaders speak and act in the name and on behalf of thousands of professionals in the sector, who are either Industrial Fishermen (IF) or Artisanal Fishermen (AF), sectors whose importance in terms of economic weight, influence, experience and expertise no longer needs to be demonstrated. The main organisations met are:

- For industrial fishing, the 'Groupement des Armateurs et Industriels de la Pêche au Sénégal' (GAIPES, which brings together and represents national interests in the industrial sector, particularly fishing and processing) and the 'Union Patronale des Mareyeurs Exportateurs du Sénégal' (UPAMES, which has around thirty permanent members. The latter are companies that work mainly with small-scale fishing and export raw or processed products);
- For small-scale fishing,¹⁰ the 'Conseil National Interprofessionnel de Pêche Artisanale au Sénégal' (CONIPAS, which brings together the five national federations active in the small-scale fishing sub-sector), the 'Fédération Nationale des GIE de Pêche' (FENAGIE/Pêche), the 'Union Nationale des GIE de Mareyeurs du Sénégal' (UNAGIEM) and the 'Réseau des Femmes de la Pêche Artisanale au Sénégal' (REFEPAS).

This category also includes fishing-related NGOs. This sub-category is very familiar with SFPAs and is involved on a daily basis in advocacy, training and awareness-raising. They are

- The 'Association ouest-africaine pour le Développement de la Pêche Artisanale' (ADEPA);
- The 'Confédération Africaine des Organisations de la Pêche Artisanale' (CAOPA).

The characteristics of all the entities in this category (year of creation and number of members, vocation and activities) are presented in detail in **Appendix 3**.

⁹ SENEMAR could not be reached.

¹⁰ The CLPA National Coordinator could not be contacted during the course of the Study.

Advisory bodies and commissions for sea fisheries

The regulatory framework for the management of the fisheries sector provides for consultative mechanisms involving professional fisheries organisations. These advisory bodies and commissions are presented below, together with their respective importance in the context of the SFPA. Their emanation, missions and composition are detailed in **Appendix 4**.

- **The CLPAs** ('Conseils Locaux de Pêche Artisanale' / Local Artisanal Fisheries Councils), established by Law 2015-18 of 13 July 2015 on the Maritime Fisheries Code, are consultation bodies whose mission is to contribute to local governance in maritime fisheries (information for artisanal fishermen, resolution of conflicts between different fishing communities and between fishermen using different fishing gear), the sustainable exploitation of fisheries resources and the development of the maritime fisheries sector. The CLPAs are key players in implementing the co-management of small-scale fisheries that the State intends to develop. In particular, they can act as relays for raising awareness and disseminating information on fishing agreements;
- **The CNCPM** ('Conseil National Consultatif des Pêches Maritimes' / National Advisory Council on Maritime Fisheries), set up by the same Act, is responsible for giving an opinion on any issue relating to the development and management of the fisheries sector (fisheries development plans, organisation of the processing and marketing sector). It can advise on the negotiation and implementation of fisheries agreements;
- **The 'Commission d'attribution des licences de pêche' / Fishing Licence Allocation Commission**, established by Decree No. 2016-1804 implementing Law No. 2015-18 of 13 July 2015, allocates all licences. "The fishing licence is granted, following the opinion of the Advisory Commission for the Allocation of Licences, by the Minister in charge of Maritime Fisheries for a renewable period of six or twelve months."
- **The 'Commission Consultative des Infractions de Pêche' / Consultative Commission for Fisheries Infringements**, also set up by Law 2015-18, deals with fishing offences by vessels in waters under Senegalese jurisdiction.

Position of the various categories with regards to the SFPA

Stakeholders do not have the same vision or views about the SFPA, as evidenced from the analysis of information from interviews with representatives of the different categories of stakeholders:

- Category 1 - Government generally defends the general interest (the State) and, as far as the SFPA is concerned, and is mainly interested in the proper management of the target species, foreign exchange earnings for Senegal, food security for the population, the absence of competition with the national fleet and the existence of a cooperation framework;
- Category 2 - Private sector/EU vessel agents defends vessels and, by extension, EU shipowners. It emphasises the sound management of target species and food safety, the jobs and financial income generated by the activities of vessels and advocates an increase in the number of vessels;
- The first sub-category 3 – fisher representation in Senegal defends its trade, finds almost no strong points in the Agreement and, on the contrary, finds a common view

on the communication deficit which represents one of the main weaknesses of the SFPA;

- The second sub-category 3 - fisheries NGOs are committed to defending fishing communities and consumers, and has identified good management of target species (tuna in particular), greater transparency on the EU side and the preservation of food safety as the SFPA's strengths.

The differences observed between the categories reflect the diversity of functions and roles of these stakeholders.

3.2 Donor partners

The main donors involved in Senegal's fisheries sector are the EU (through the SFPA), the Republic of Korea (Project to build a refrigeration complex in Hann and Project to acquire refrigerated lorries), the Global Environment Facility (Regional project "West Africa Coastal Fisheries Initiative" (IPC/AO)), Japan (West Africa Fisheries Co-management Project (COPAO)), USAID (Dekkal Geej Project), India (Cold Programme) and Belgium (Project to set up a training scheme for seafaring professions (PF2M)).

The Republic of Korea co-finances with Senegal the Project for the construction of a refrigeration complex in Hann (total cost of 3 billion FCFA, including 2.5 billion financed by Korea) and the project for the acquisition of at least 55 refrigerated trucks (total cost of 2.5 billion FCFA, including 2 billion FCFA financed by Korea).

The Project « Initiative Pêche Côtière Afrique de l'Ouest » (IPC/AO) is implemented in three countries (Cabo Verde, Senegal and Côte d'Ivoire) for a period of five years and an overall budget of about 4.2 billion FCFA. Its implementation started in 2019 and will continue until mid-2024 after a one-year extension was decided in 2022. It is funded by the Global Environment Facility (GEF) and FAO is the Executing Agency.

The West Africa Fisheries Co-Management Project (Projet de Cogestion des Pêcheries en Afrique de l'Ouest (COPAO)), amounting to 332 million FCAF, is financed by the Government of Japan within the framework of Technical Cooperation. It started in April 2019, for a period of 4 years. The beneficiary countries are Senegal, Mauritania, the Gambia, Guinea Bissau, the Republic of Guinea, Cabo Verde, Sierra Leone and Côte d'Ivoire. Its objective is to consolidate and generalize co-management in Senegal and other West African countries.

The second phase of the Refrigeration Program, financed by the Indian cooperation, involves 19 refrigeration complexes and 76 refrigerated trucks, for a total cost of US\$19 million, or about 9.5 billion FCFA.

In addition, the "Shared Sardinella" Project of FAO's EAF-NANSEN programme is involved in the management of small pelagics/sardinellas in Morocco, Mauritania, Senegal and The Gambia, whose implementation in Senegal has been the subject of a protocol between the DPM and FAO. The main expected result in the long term is the formulation, validation and approval of a management plan for the sardinella fishery in accordance with the Eco-Systemic Approach to fisheries.

Detailed information on these various programmes and projects can be found in **Appendix 5**.¹¹

¹¹ This information comes from the MPEM's 2021 Report. It was not possible to complete and update this information with the DPM during the course of the Study.

4. Political and legislative environment

4.1 Main texts relating to cooperation between Senegal and third countries in the field of fisheries and aquaculture

The main texts relating to cooperation between Senegal and third countries in the field of fisheries and aquaculture are as follows:

- The Protocol for the application of the Convention between the Government of the Republic of Senegal and the Government of the Republic of **Guinea-Bissau** in the field of maritime fisheries, signed on 22 December 1978;
- The Convention between the Government of the Republic of Senegal and the Government of the Republic of **Cape Verde** in the field of maritime fisheries of 29 March 1985 and its Protocol of application;
- The Protocol implementing the convention on fisheries and aquaculture between the Government of the Republic of Senegal and the Government of the **Islamic Republic of Mauritania**, signed in Nouakchott on 25 February 2001;
- The Fisheries and Aquaculture Agreement between the Government of the Republic of Senegal and the Government of the Republic of **The Gambia** signed on 24 March 2017;
- The Fisheries and Aquaculture Agreement between the Government of the Republic of Senegal and the Government of the Republic of **Liberia** signed on 22 January 2019.

4.2 Main laws and regulations

Chronology of the main texts

The main legislative and regulatory texts relating to fisheries and aquaculture are as follows (in chronological order):

- Law No. 2002-22 of 16 August 2002 on the Merchant Shipping Code ;
- Framework Law No. 2009-20 of 4 May 2009 on Enforcement Agencies ;
- Decree no. 2009-583 of 18 June 2009 on the creation, organisation and operation of the Agence Nationale des Affaires Maritimes (ANAM) ;
- Law 2015-18 of 13 July 2015 on the Maritime Fishing Code;
- Decree No. 2016-1804 implementing Law No. 2015-18 of 13 July 2015 on the Maritime Fishing Code;
- Sectoral policy and development letter for fisheries and aquaculture (LPSDPA) for the period 2016-2023 ;
- Decree no. 2018-1292 on the organisation of the Ministry of Fisheries and the Maritime Economy (MPEM) ;
- Order No. 007225 of 30 May 2018 setting the conditions for the taking of live bait by pole-and-line tuna vessels in waters under Senegalese jurisdiction;
- Service note dated 14/12/2022 setting up a monitoring committee for Sectoral Support projects.

Note that the MPEM is in the process of reviewing the Marine Fisheries Code (Law 2015-18 of 13 July 2015) as well as the development of a new Inland Fisheries Code and its implementing decree.¹²

The LPSDPA 2016-2023

In June 2016, Senegal adopted a new Lettre de Politique Sectorielle et de Développement de la Pêche et de l'Aquaculture (LPSDPA) for the period 2016-2023.

The LPSDPA was drawn up following a wide-ranging consultation with stakeholders, and its aim is to involve the fisheries and aquaculture sector in the growth dynamic called for by the Emerging Senegal Plan. The new sectoral policy takes an uncompromising look at the disappointing results of the implementation of the 2008-2013 sectoral policy which, despite its ambitions, had not succeeded in establishing a balance between resources and fishing capacity, with, in particular, the uncontrolled development of the small-scale fishing sector and that of onshore processing units, which had the dual effect of contributing to the depletion of stocks and reducing the availability of fish for the population. The previous sectoral policy also failed to stimulate growth in the aquaculture sector, which remained in its infancy despite the country's potential. Among the reasons for these failures, the LPSDPA points to institutional weaknesses, with a lack of ownership of the plan and insufficient human and budgetary capacity in relation to the ambitions, whether in terms of management and administration, fisheries research or monitoring compliance with the rules.

Under the general objective of contributing to greater food security, economic growth and local development, the LPSDPA 2016-2023 articulates the sector policy around four specific objectives:

- Sustainable management of fisheries resources and restoration of habitats: better regulation and control of access to small-scale fisheries, definition and implementation of management plans for each fishery, restoration of natural habitats; with the underlying aim of developing management mechanisms involving professionals (co-management) and strengthening research;
- Developing aquaculture: improving the business climate in the sector, enhancing the technical skills of those involved, developing infrastructure to support the development of the sector (hatcheries, feed mills);
- Promoting the value of fish production: improving the value chain (cold storage conditions, health checks), restructuring the fish industry, setting up industrial and small-scale fish processing centres;
- Strengthening port development and sea-river transport services.

Drawing lessons from previous periods, the LPSDPA 2016-2023 considers i) restructuring the various administrative and consultation structures so as to align them with the objectives, and ii) strengthening the human (recruitment, training) and financial (budgets) capacities of the entities responsible for implementing the actions. The LPSDPA 2016-2023 also establishes a monitoring and evaluation framework, including the periodic holding of a joint annual review involving the partners, including the EU, and the creation of a central body, the Sectoral Monitoring & Evaluation Committee (CSSE), responsible for monitoring the implementation of the LPSDPA measures.

¹² Source: MPEM. Revue sectorielle 2022 - Édition 2023 (version provisoire).

To operationalize these axes, in line with the reforms introduced in public financial management, four budget programs have been selected in the Ministry's Multiannual Expenditure Programming Document:

- The Fisheries and Aquaculture Programme, which aims to contribute to strengthening food and nutrition security, economic growth and local development.
- The Maritime Economy Programme, the aim of which is to improve transport services, maritime training and strengthen the port platform, with appropriate infrastructure and equipment.
- The Guidance, Coordination and Administrative Management Programme, which aims to improve the governance of fisheries and the maritime economy and to ensure the integration of sustainable management principles defined in policies and programmes.
- The Fisheries and Support Industries Promotion Financial Instrument ('Caisse d'encouragement à la pêche et à ses industries annexes' - CEPIA) Programme which aims to ensure sustainable financing of investments to support the production and promotion of fishery products.

Note that the MPEM started in 2021 the mid-term evaluation process of the LPSDPA under an FAO Technical Cooperation Programme.¹³

4.3 Other reference documents

They are as follows:

- FAO Voluntary Guidelines for Sustainable Small-scale Fisheries in the Context of Food Security and Poverty Eradication;
- FAO international guidelines on by-catch management and reduction of discards ;
- Common Fisheries Policy ;
- MPEM Fisheries 2020 Report ;
- MPEM Fisheries Report 2021 (the 2022 report has not yet been validated);
- Rapport de concertation sur les rôles et responsabilités des Organisations de Pêche Artisanale (OPA) au Sénégal (APRAPAM website) ;
- Budget implementation monitoring table for the European Union-Senegal Sectoral Support (2019-2024) ;
- Report of the annual meeting of the Joint Scientific Committee relating to the Fisheries Agreement signed between the Republic of Senegal and the European Union (Madrid 24-26 January 2023) (European Union website).

¹³ Source: MPEM. Revue sectorielle 2022 - Édition 2023 (version provisoire).

5. How to increase benefits from EU fleet activities to Senegal in terms of fish landings and employment: Findings

5.1 Port infrastructure and services

The range of services offered by the Port Autonome de Dakar (PAD)¹⁴ in terms of handling and transit services is reported by stakeholders in Senegal to be one of the best in the West African sub-region. Overall, the strengths of the Port of Dakar are:

- 24-hour accessibility;
- Sufficient draught;
- The availability and competitiveness of services and supplies (in particular, the supply of hydrocarbons is prized for its competitive prices and better offer; food supplies are satisfactory);
- Good organisation (the quality of the infrastructure and the Senegalese workforce are highly appreciated).

These factors explain why EU vessels fishing in Senegal and other countries under fishing agreements may use Dakar's port facilities. There can however be periodic problems with quayside availability in the event of heavy traffic. The overall process related to a vessel entering the port, i.e. her catches and her crew, can be cumbersome and time-consuming, as a series of entities are involved altogether: customs, police, health and maritime economy (DITP, DPSP, DPM and CRODT).

5.2 Fish landings by EU fishing vessels into Senegal

Catches, landings and product flows

Table 4, Figure 2 and Figure 3 present catches by the various categories of EU vessels in Senegalese waters during the period 2020-July 2023. There has been a marked decline in catches of tuna (potentially driven by and also a cause of the decline in authorisations as presented earlier); while catches of black hake decreased between 2020 and 2022 then are increased in 2023 (with one more vessel authorized). Note that data for 2023 only cover the period to July.

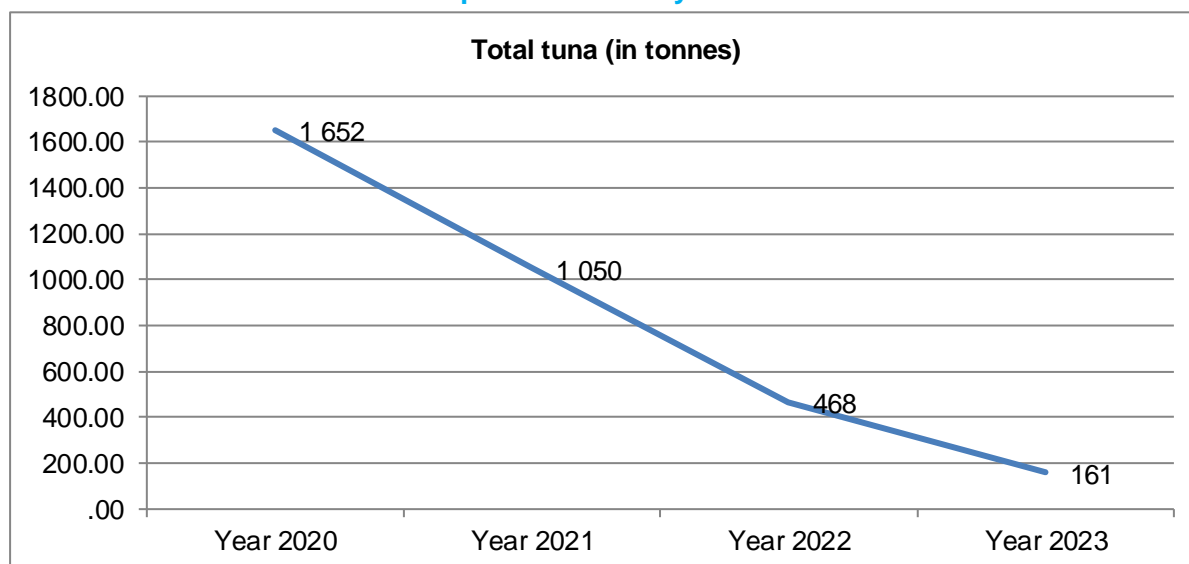
¹⁴ During the study, it was not possible to gather precise information on the PAD's infrastructure and facilities available for fishing.

Table 4: Catches of the various categories of EU vessels in the Senegalese waters during the period 2020-2023

Category of vessel	Year / Country	2020	2021	2022	2023 ¹⁵
Purse seiners	Spain	440	658	215	113
	France	35	0	0	0
	<i>Total</i>	<i>475</i>	<i>658</i>	<i>215</i>	<i>113</i>
Tuna pole-and-line	Spain	1 031	295	206	48
	France	127	13	48	0
	<i>Total</i>	<i>1 158</i>	<i>307</i>	<i>254</i>	<i>48</i>
Tuna surface longliners - Total	Spain	19	84	0	0
Black hake trawlers - Total	Spain	1 588	792	581	734
Total tuna		1 652	1 050	468	161
Total hake		1 588	792	581	734
Total		3 240	1 842	1 049	895

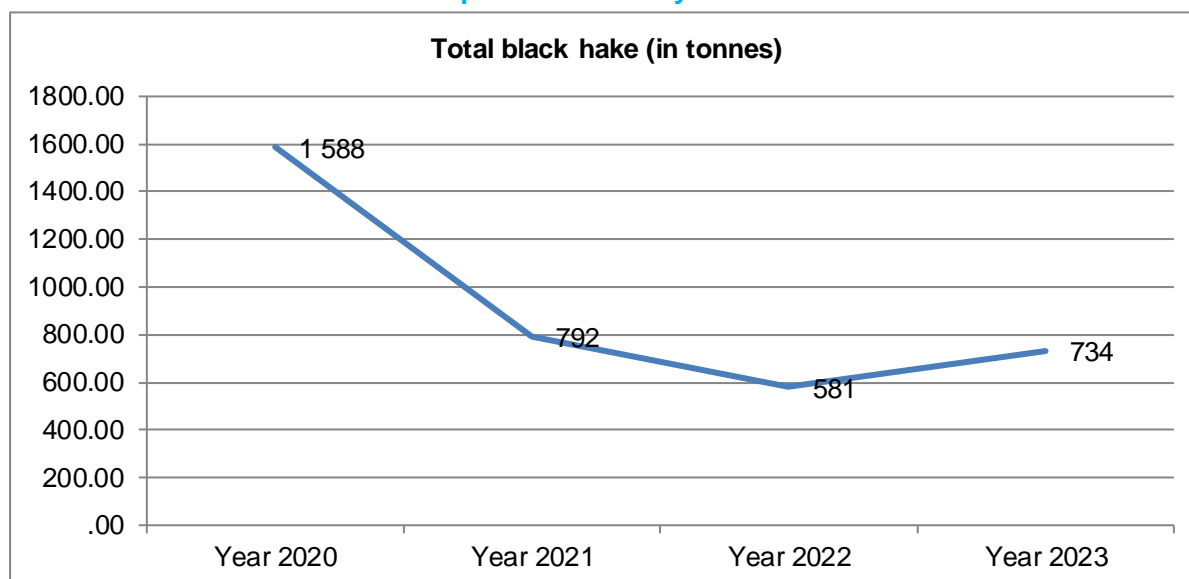
Source: Compilation from DG MARE Unit B3 data

Figure 2: Catches of tuna by EU vessels in the Senegalese waters, period 2020-July 2023



¹⁵ Until July 2023.

Figure 3: Catches of black hake by EU vessels in the Senegalese waters, period 2020-July 2023



Law No. 2015-18 of 18 July 2015 on the Maritime Fishing Code stipulates: "Article 73. - All industrial fishing vessels and all small-scale fishing boats authorised to operate in waters under Senegalese jurisdiction are required to land their catches in a port or landing site authorised by regulation, *subject to any provisions to the contrary set out in the fisheries agreements concluded by Senegal* [our emphasis]. Landing catches means putting the caught products ashore with a view to sale, storage, treatment, processing or export.

Pole-and-line vessels are obliged by the Protocol to unload at the port of Dakar, and do so. However, the two tuna processing factories based in Dakar (SCASA [Société de Conserverie Africaine S.A] and CONDAK [Conserverie Dakaroise], have their own fleets of vessels and do not have established commercial relationships with EU pole and line vessels. EU catches (which are frozen onboard) are more commonly therefore transshipped to canneries in Ghana, and to a lesser extent Cote d'Ivoire, with much of this product ending up in the EU market, but some sold in African markets. As far as the researchers are aware there are not current or planned investments to establish new processing factories in Senegal by EU interests. Some 'faux-poisson' e.g. bycatch is sold in Dakar for sale on the domestic market (volumes are not known).

The Protocol does not specifically require purse seiners, longliners or demersal trawlers to land catches in Senegal/Dakar, and these vessels do not do so.

Purse seiners land their catches predominantly (80-90%) in Côte d'Ivoire (Abidjan) with the remainder being landed in Cape Verde (mainly only Spanish catches) and Ghana. These landings are motivated by tuna canneries plants located at those locations.

Longline catches are not landed in Senegal, and the EU fleet targets swordfish in association with bigeye tuna. Some vessels target these species in association with sharks. The EU longliner fleet lands catches in the EU, including the Canary Islands.

With respect to demersal freezer trawlers, these vessels also predominantly land catches into Canary Islands, for final sale in EU markets although some landings are made in Dakar for export.

5.3 Use/employment of Senegalese crew and observers by EU vessels

Jobs and pay on board EU vessels

Embarking seamen

The Annex to the Protocol relating to "the conditions governing fishing activities by EU vessels in Senegal's fishing zones", in particular Chapter V: "Embarking seamen", specifies:

"1. Owners of EU fishing vessels operating under this Protocol shall employ ACP nationals, subject to the following conditions and limits:

- For the fleet of tuna seiners and longliners, as well as for the fleet of deep-water demersal trawlers: at least 25% of the seamen signed on during the tuna fishing season in the Senegalese fishing zone will be of Senegalese origin or possibly from an ACP country;
 - For the baitboat fleet, at least 30%.
2. Shipowners will endeavour to take on board seamen from Senegal.
 3. The principles and rights of the fundamental conventions of the International Labour Organisation (ILO) shall apply to seamen signed on by EU fishing vessels. These include, in particular, freedom of association and the effective recognition of workers' right to collective bargaining and the elimination of discrimination in respect of employment and occupation.
 4. The employment contracts of Senegalese seamen, a copy of which shall be given to the maritime authority and to the signatories of these contracts, shall be drawn up between the shipowners' representative(s) and the seamen and/or their trade unions or representatives. These contracts shall guarantee the seamen decent living and working conditions on board and the benefit of the social security scheme applicable to them, in accordance with the applicable legislation and ILO standards, including death, sickness and accident insurance.
 5. The wages of ACP seamen shall be paid by the shipowners. They shall be fixed by mutual agreement between the shipowners or their representatives and the seamen and/or their trade unions or representatives. However, wage conditions for seamen from ACP countries shall not be lower than ILO standards.

The quota of fishermen to be taken on board EU vessels is not generally a constraint. Senegalese sailors are taken on board because of their recognised qualifications and the fact that they are considered as some of the best in the sub-region. However, in order to comply with the quota for hiring local staff (1/3 of the vessel's staff), a vessel may have to take on board some less well-trained crew.

The application of the ILO minimum wage is a problem, creating social instability (strikes) with a negative impact on the profitability requirements of vessels and the social situation.

The application of the ILO minimum wage is strongly felt as a constraint by shipowners because:

- It is a regulatory provision of the Agreement that cannot be avoided (ANAM fought for the minimum wage defined by the ILO to be applied to Senegalese and ACP seafarers; the ILO recommendation is not binding in itself, but as soon as it is included in the Protocol, it is a commitment);
- It poses the problem of equity for seafarers whose salaries are based on the Minimum Interprofessional Growth Wage (SMIC) of their respective countries, which results in different salaries for equal work and equal positions (the Seychellois have

been revalued, and the same should apply to the other ACP countries: equal pay for equal work);

- This is a recurring problem (every year, this aspect reappears in the list of seamen's grievances submitted to the MPEM by the union platform). ANAM had referred the matter to the EU. The list of shipowners who do not comply with this clause has been submitted to the EU after it had requested it);
- This is a source of instability, with strikes affecting the smooth running of fishing activities by EU vessels and affecting all ACP countries.

The Protocol imposes obligations on shipowners covered by the Agreement but not on others, who can then take on board seafarers without respecting the ILO minimum wage. This situation puts EU shipowners in a position of unfair competition compared with other vessels with no obligations.

Faced with the need for profitability in a highly competitive environment, the absence of a solution risks undermining the competitiveness of EU vessels under the Agreement, at a time when other shipowners are finding more competitive ways of fishing (no proper contracts, no wage contributions, no decent working conditions on board, no proper remuneration).

Senegal should ensure that there is fairness and find a compromise by updating the 2006 seafarers collective agreement.

Embarking Senegalese observers on EU vessels

The other important point concerning vessel management is the embarkation of observers. Law No. 2015-18 of 18 July 2015 on the Maritime Fishing Code, Section VIII. - The right to fish for foreign vessels Article 28. Point (j) stipulates that "Agreements on access to fisheries resources in waters under Senegal's jurisdiction must, in particular, provide for the embarkation of observers and maritime registrants of Senegalese nationality."

The Protocol for the implementation of the 2019-2024 SFPA,¹⁶ sets out the obligations of vessels with regard to the observation by Senegal of the vessels' fishing activities in waters under its jurisdiction. In summary, the provisions are as follows:

- The obligation to take on board a Senegalese observer;
- The obligation to treat the observer on board as an officer;
- The obligation to respect the observer's time on board the vessel;
- The obligation to pay the costs of repatriating the observer to Senegal as soon as possible;
- The obligation to facilitate the embarkation of the observer;
- The cost of accommodation and food on board the ship is borne by the shipowner;
- The captain shall take all measures within his responsibility to ensure the physical and moral safety of the observer;
- When paying the annual fee, owners of freezer tuna seiners, pole-and-line vessels and surface longliners also pay the DPSP¹⁷ a lump sum of 600 euros for each vessel to contribute to the smooth running of the observer programme;

¹⁶ in its Annex on the Conditions for the exercise of fishing activities in Senegalese fishing zones by EU vessels, Chapter III: Technical measures, Section 5: Observers

¹⁷ DPSP: Directorate for Fisheries Protection and Surveillance

- When paying the quarterly fee, trawler owners also pay the DPSP a lump sum of EUR 150 for each vessel as a contribution to the smooth running of the observer programme.

In accordance with the Protocol, the salary and social contributions of the observer are to be paid by Senegal, but the other costs of the observer listed above are to be paid by the shipowner. In order to reduce administrative formalities for shipowners, Senegal may preferably include in the financial contribution all charges relating to the observation of fishing activities in waters under its jurisdiction.

The embarkation of observers from Senegal by purse seiners that fish in several countries during the same trip can be practically difficult, hence the Protocol specifies that for seiners, the observer may be Senegalese or ACP.

The legislative and regulatory provisions relating to the obligation to take an observer on board foreign vessels has however led to a strong demand for observers, and the insufficient number of qualified observers can therefore be a constraint. The observer must be a senior fisheries technician with the ability to identify species. The Senegalese government has recently recruited 40 observers, who will be in post by 2024 at the latest. This number could be sufficient for the embarkation of qualified observers.

One specific issue is the issuance of visa for those crew and observers who need to embark on board EU vessels in a port outside of Senegal (black hake trawlers essentially, in the Canary Islands/Spain).

6. How to design and implement the Sectoral Support component of the SFPAs more effectively: Findings

6.1 Sectoral Support Content

Key findings in terms of the content of the sectoral support are:

1. Projects financed by the SS - The main projects funded by the SS are as follows:
 - **Support for cleaning up the seabed:** the overall aim of cleaning up the seabed and coastline is to help restore habitats and preserve resources and the marine ecosystem;
 - **Improving the safety of artisanal fishermen** (purchase of lifejackets - subsidy on the purchase of lifejackets costing 2,500 instead of 5,000 CFA francs; geolocation beacons): this project is helping to reduce the number of pirogues and artisanal fishermen disappearing at sea;
 - **Construction of the Ndangane Sambou fishing quay:** Construction of the quay was carried out as part of the 2014/2019 SFPAs. An amendment was made to complete the work (construction of an access track);
 - **Safeguarding national export approval:** Senegal obtained its national approval for export to the European Union in 1996. This technical and health accreditation gives Senegalese fish products access to the United States and Asian markets. However, efforts need to be made to maintain this accreditation in view of the possible risks of contamination, particularly chemical, in the context of oil and gas development;
 - **Capacity-building for small-scale fisheries:** the aim of this project is to equip small-scale fisheries and bring the facilities for landing fish products up to standard, in line with the requirements of the partners. The Local Artisanal Fishing Councils (CLPAs) are supported in implementing their Annual Work Plan (AWP), which includes the manufacture and installation of octopus pots and participatory monitoring;
 - **Stocking of fish in inland areas** and support for Matam's inland fishing communities.
 - **Installation of octopus pots** (revenue from this technique has risen from 1 billion CFA francs in 2019 to 4 billion CFA francs in 2021).

A significant part of its envelope is dedicated to AF and food security (respectively 28% and 19% over the first two years). There are no specific interventions geared towards women (however, women are part of the CLPAs and therefore the project 'Capacity-building for small-scale fisheries' did involve a certain number of women beneficiaries) and indicators in the SS matrix are not gender disaggregated.

2. SS projects and consistency with the LPSDPA (2016-2023) - IF and AF stakeholder views can be summarized as being generally unsatisfied with the sectoral support, on the basis that they feel the fisheries administration does not take into account their concerns and gives priority to infrastructure funding, to the detriment of the resource and organisational and institutional strengthening. IF and AF stakeholders claim to have repeatedly stressed the limited impact of sectoral support on the development of

fisheries in Senegal and what they consider to be its inconsistency with the objectives of the Sectoral Policy and Development Letter for Fisheries and Aquaculture (LPSDPA), i.e. i) Sustainable management of fisheries resources and restoration of habitats, ii) Developing aquaculture and iii) Promoting the value of fish production (see Section 4.2). the annual implementation and ex-post evaluation reports however provide information to suggest sectoral support has benefited the fisheries sector.

Stakeholder views collected during the fieldwork on whether the SS projects are consistent with the objectives of the LPSDPA are presented in Table 5 below, and show however that all the projects developed under the SFPAs meet at least one of the objectives of the LPSDPA. Although none concerned the development of aquaculture, sectoral support funding is not expected or required to address and implement all aspects of national sectoral policy, just to be consistent with it. All the activities financed by the SS are included in the LPSDPA and are therefore consistent with the sectoral fisheries policy.

Table 5: SS projects and consistency with the LPSDPA

Objectives of the LPSDPA	Sustainable management of fish stocks and restoration of habitats	Promoting the value of fish production	Developing aquaculture
SS projects			
Support for cleaning up the seabed	<u>Yes</u>	No	No
Improving safety for small-scale fishermen	No	<u>Yes</u> ¹⁸	No
Construction of the Ndangane Sambou fishing quay	No	<u>Yes</u>	No
Safeguarding national export approval	No	<u>Yes</u>	No
Capacity-building for small-scale fishing operators	<u>Yes</u>	<u>Yes</u>	No
Stocking the Pattowel marigot	<u>Yes</u>	<u>Yes</u>	No
Installation of octopus pots	No	<u>Yes</u>	No

- SS projects and SFPAs potential - Stakeholders were canvassed during the field work for their views as to whether the different SS projects would/could contribute to potentially desirable outcomes of SFPAs as inferred by the research questions which are the focus of this study. The answers are presented in Table 6 below, which shows that all the projects developed under the SFPAs SS (with the exception of seabed cleaning) meet at least one of the potentially desirable outcomes of the SFPAs as implied by the research questions.
- Note that the MPEM has launched a study 'Audit et plan d'institutionnalisation du Genre' in 2022.¹⁹

¹⁸ Indirectly.

¹⁹ Source: MPEM. Revue sectorielle 2022 - Édition 2023 (version provisoire). Update not available.

Table 6: SS projects and SFPA potential

Desirable outcomes of SFPA SS projects	Increase in landings by EU vessels	Employment of Senegalese nationals on EU vessels	Support for national value chains	Gender equity	Food security
Support for cleaning up the seabed	No	No	No	No	No
Improving safety for small-scale fishermen	No	No	<u>Yes</u> ²⁰	No	No
Construction of the Ndangane Sambou fishing quay	No	No	<u>Yes</u>	No	<u>Yes</u>
Safeguarding national export approval	<u>Yes</u>	<u>Yes</u>	<u>Yes</u>	No	No
Capacity-building for small-scale fishing operators	No	No	<u>Yes</u>	<u>Yes</u>	No
Stocking the Pattowel marigot	No	No	<u>Yes</u>	<u>Yes</u>	<u>Yes</u>

5. The SFPA is positive in bringing in foreign currency and strengthening the sector as a whole through the SS. In particular, it has been enabling :
- Improved statistics and planning;
 - Regeneration of the resource in the Pattowel marigot in Matam;
 - Implemented part of its seabed clean-up programme by DGEFM;
 - Strengthened monitoring, surveillance and control of the sector;
 - Improved certain DPM infrastructure projects (Ndangane Sambou fishing wharf; Joal fisheries control and surveillance post);
 - Finance the installation of octopus pots and the creation of artificial reefs;
 - Improve safety at sea;
 - Improve conditions for vulnerable populations in inland fishing;
 - Attempts to make the research vessel Itaf Deme operational.
5. Some stakeholders expressed reservations about the fact that the SS gives the impression of funding too many small projects, with a high number of interventions given the relatively limited budget envelope. It should be emphasised that the lack of definition of one or fewer larger projects for the SS support prior to the negotiation of the envelope for this SS has negatively affected its effectiveness (according to stakeholders). The “sprinkling” mentioned by stakeholders (with relatively small budgets available for many projects) is intrinsically linked to the negotiation of the SS component. The projects can only be disparate because they are the result of disparate objectives that have been swiftly identified in the Protocol, and the result of funding available.

²⁰ do.

6.2 Sectoral Support processes

Key findings in terms of the processes of the sectoral support are:

1. The SS matrix is the result of a planning process involving the Senegalese authorities and then approval by the EU during the Joint Committee meeting, leading to the multi-annual budgeting matrix.
2. In terms of SS management procedures - The SS management procedures were agreed by the parties in the Implementation Protocol. In addition to the disbursement and justification procedures clarified between the EU and Senegal, other procedural elements include the Ministry's internal SS management procedures. At present the MPEM is solely responsible for expressing sectoral support needs/activities, authorising the expenditure, collecting the AS funds paid by the Treasury, keeping the funds collected, disbursing the funds for expense, carrying out the projects, recording the supporting documents after execution and keeping the accounts. However there is certainly scope, as expressed by stakeholders for IF/AF, NGOs and the private sector to be more involved in expressing sectoral support needs and also in being involved in the implementation of sectoral support projects/activities.
3. The EU fisheries attaché based in Senegal engages in communication with DPM on an ongoing basis about the Sectoral Support, and also holds specific meetings/missions to discuss and comment on draft versions of the Sectoral Support annual implementation reports, and to conduct verification of activities and expenditure reported by MPEM under the Sectoral Support component.
4. While the Protocol provides for revisions of the SS matrix based on approvals provided during Joint Committee meetings, the ability to adopt flexible implementation in between Joint Committee meetings based on emerging needs is limited.
5. In order to improve the process of implementation of the SS projects, a Technical Committee composed of the main heads of MPEM directorates was established in 2022²¹ within the MPEM.
6. The process to agree and report on the SS matrix has not been very inclusive, and stakeholders report:
 - A failure to take into account the opinions of AF and IF players when identifying needs and implementing measures;
 - Low involvement of women in the process and in decision-making, weak transparency and information, and insufficient communication about the achievements of the SS;
 - Poor involvement of the entities concerned, and in particular private sector players, in the negotiation of the Agreement (only the GAIPES²² professionals were represented at the negotiations and demanded observer status; they felt that their opinions during the negotiations were not taken into account; and financial aspects were negotiated without their presence);
 - Absence of any involved non-government parties over the implementation of the Agreement;

²¹ Note de service 14 Dec. 2022.

²² Groupement des Armateurs et Industriels de la Pêche au Sénégal / Group of Fishing Shipowners and Processors in Senegal.

7. The visibility of SS projects is low:²³ information on the SS, especially concerning support for small-scale fishing, is not widely disseminated and small-scale fishing stakeholders are not aware of the Agreement. This lack of visibility is linked to:
- Lack of information and communication around the achievements, through media and means of dissemination in local languages;
 - Lack of involvement of the entities concerned in the design and implementation of SS actions;
 - Lack of harmonisation of the financial partners' involvement in a project. For example, the installation of octopus pots is financed simultaneously by the SS, JICA and UPAMES, i.e. a large number of partners who do not coordinate their actions and who, each on their own, claim authorship of the project.

6.3 Overall interest in maintaining and strengthening cooperation with the EU

In general, stakeholders strongly supported the interest of maintaining and strengthening cooperation with the EU, with the following comments:

1. The Agreement is very beneficial for Senegal and has no negative impact on Senegalese fisheries.²⁴ It is a satisfactory agreement that needs to be improved by establishing a frank dialogue.
2. Funding for the fisheries sector should be made more visible and strengthened through cooperation with the EU, in addition to the counterpart funding under the Agreement. Cooperation with the EU plays an important role in Senegal in all sectors, and it is important to maintain collaboration in the fisheries sector.
3. Senegal must avoid separating from the EU and replacing it with other partners (e.g. non-EU Europeans, Chinese, Russians and Koreans) in another form, using the flagging of vessels in Senegal as 'local vessels' when beneficially owned by other foreign entities. Chinese and Korean purse seiners are not covered by any agreement and operate under Senegalese licences.
4. The EU and the World Bank are in the process of promoting the ERS system: the EU is advocating the generalisation of this system for Senegalese tuna vessels and demersal vessels. This project is underway thanks to the SS and concerns 39 Senegalese vessels; the World Bank has agreed to finance the generalisation of the system for 75 Senegalese vessels.

²³ Article 5: Sectoral support of the Implementation Protocol stipulates in point 9: "The parties shall ensure the visibility of the achievements of the sectoral support".

²⁴ However, the EU's 2019 evaluation of the Protocol to the EU-Senegal sustainable fisheries partnership agreement (SFPA) highlighted the lack of availability of adequate scientific data on bycatch or discards of the deepsea demersal trawl fleet, which has precluded assessment of the broader ecosystem impacts of the fishery

7. Conclusions and recommendations to increase the benefits of the SFPA to Senegal

The work completed in Senegal as the basis for this report was organized differently to that in the other countries, due to late agreement over Senegal being included as the fourth case study country. This meant that an international consultant was not deployed to Senegal. A certain amount of field-work was undertaken by a national consultant, which provided an opportunity to identify and meet the main stakeholders involved in negotiating and/or implementing the SFPA in Senegal, and get their insights regarding the key research areas of interest for the BMZ Project. The relatively low level of inputs in Senegal (with however, a high quantitative and qualitative level of interaction with the stakeholders) meant in particular that the conclusions and recommendations elaborated on the basis of these insights and presented hereafter were not discussed and validated during a national workshop at the end of the work in Senegal (as was the case for The Gambia, Madagascar and Mauritania).

7.1 EU vessel landings and employment on EU vessels

Conclusions

Negative

1. The economic cooperation component of the SFPA is considered weak: there are limited linkages between the EU fleets and the local industry in terms of landings in Dakar, onshore processing of EU catches, and/or sale of EU catches on the local market. However, given competition from other ports in the region which are established processing hubs, attracting more landings to Dakar would be difficult to achieve, and could only displace economic activity from other African countries.
2. Access to the Port of Dakar can be complicated by wrecks and over-crowding.
3. The 2006 seafarers collective agreement is considered to be unfavourable for seafarers, and obsolete. Most particularly, the prevailing pay conditions are considered unsatisfactory by the Senegalese crews. EU shipowners are reluctant to comply with the ILO minimum wage, which is a source of recurrent dispute.

Positive

4. Some 'faux-poisson' (albeit in limited quantities – quantitative data are not available) from seiners and pole and line vessels, which is not prized by canneries, is landed in Dakar and sold on the local market, helping to ensure the country's food security. Since women are heavily involved in trading and processing of fish in Senegal, this activity is clearly beneficial to women. Estimates of how many women this might involve are not available.
5. The services offered by the port of Dakar in terms of handling and transit services are considered to be some of the best in the West African sub-region (accessibility, availability and competitiveness of services and supplies, good organisation).
6. The number of trained observers available in the short term (2024) appears sufficient to cover the needs of EU vessels.
7. There is the prospect of resolving the issue of seafarers' pay by updating the seafarers collective agreement.



Recommendations

1. Improving port infrastructure and services in Dakar:
 - The Port of Dakar should improve the accessibility to the Port, getting the wrecks (over 70) removed from its area;
 - Respective entities should improve customs, police, and health formalities, in liaison with MPEM;
2. Improving conditions for crews :
 - Unions, ANAM and MPEM update and then implement the seafarers collective agreement;
 - EU shipowners in liaison with MPEM improve pay conditions for fishermen on EU vessels by applying the ILO pay scale;
 - MPEM arrange for the Ministry of Foreign Affairs to facilitate the issuance of visas for sailors embarking outside Senegal.

7.2 Maximising the potential of Sectoral Support for domestic fisheries value chains, gender equity and food security

Conclusions**Negative**

1. The lack of inclusion of relevant stakeholders groups in defining the Sectoral Support matrix. Previously, negotiations were well prepared (the Presidency, the Ministry of Economy and Finance, Foreign Affairs, stakeholders, research and legal experts were involved and agreed on what should or should not be accepted, in the name of a common good, the sea). Today, a single entity, the MPEM, steers the process from start to finish, with little involvement from the other entities concerned.
2. Weak communication with stakeholders, in particular those involved in small-scale fishing, about implementation progress.
3. Absence of any gender specific activities in the SS matrix, and lack of gender disaggregation of indicators and targets.
4. SS funds are used to fund many small projects which spreads resources thinly, rather than focusses on fewer larger and more impactful projects.
5. The SS management procedures reduce the potential for adaptive management/use of funds, and rapid payment of sectoral support tranches of funding, given that changes/payments must be approved through the Joint Committee meetings.

Positive

6. A number of major achievements have been made within the SS framework:
 - Improved management of marine resources and ecosystems (in particular through ERS, participatory monitoring, cleaning up the seabed);
 - Support for national value chains (Ndangane Sambou fishing wharf, safeguarding national export approval);
 - Food security (fish stocking in Marigot Pattowel).

7. The content of the Sectoral Support as it currently stands is quite supportive of small-scale fisheries and food security.

Recommendations

1. Improve SS management procedures :
 - MPEM and EU expedite disbursement procedures;
 - MPEM and EU ensure greater flexibility in the use of sectoral support (e.g. reserving a third of the budget for emergency procedures);
 - MPEM make use of the possibility of asking to reorganise the matrix during the course of the project if needed, with due diligence between the two parties;
 - Revive the National Advisory Council on Sea Fisheries (CNCPM) and give it a role in the Joint Committee as a representative of Senegal.
2. MPEM involve relevant stakeholders in any future negotiation (to express the needs of beneficiaries) and implementation of the Agreement, in particular entities among the advisory bodies, the CLPAs, the women's network, CONIPAS, the fishing quays network, UPAMES, GAIPES, CRODT, the Ministry of the Environment, Foreign Affairs.²⁵ It would not be practical to involve too many entities in the negotiations; all should however be involved in national consultations on the content of the Protocol and the SS before the government negotiates and agrees the Protocol and the SS.
3. Provide support to small-scale fishing organisations so that they can better play their role in sensitization on fishing policies.
4. MPEM and EU strengthen joint communication and awareness-raising campaigns on the achievements of the SS. MPEM to organise a national tour to publicise the Agreement in national languages so that it can be better understood by the local population, with the aim of improving their ownership of the Agreement; use the fishing communities' community radio stations (the SS can be used to buy broadcasts, inform and equip journalists to publicise the Agreement); organise information-sharing workshops at national level (parliamentarians, consumers, administration, stakeholders).
5. MPEM create an extended management committee for consultation, coordination and harmonisation on the SS with all the entities concerned (CLPA network, Women's network; CONIPAS, Fishing quays network, CRODT, GAIPES, UPAMES etc.), working in close liaison with the Technical Committee for SS implementation existing within the MPEM.
6. MPEM include some gender-specific activities within the activities funded through the SS, and ensure that relevant indicators in the SS matrix are gender disaggregated.

²⁵ Law No. 2015-18 of 13 July 2015 on the Maritime Fishing Code, Section IV. - De la démarche participative - states in Article 5." When defining policies for the sustainable development and management of maritime fishing activities, the State shall take appropriate measures to facilitate consultation with and participation by organisations of professionals in the sector, maritime fishing communities and all other stakeholders concerned.

Article 6. The State shall promote the co-management of fisheries with organisations of professionals in the sector, maritime fishing communities and all other stakeholders concerned. The terms and conditions for implementing co-management of fisheries shall be determined by regulation.

Appendix 1 : Letter of introduction of the national consultant

REPUBLIQUE DU SENEGAL
 Un Peuple – Un But – Une Foi



 MINISTERE DES PECHEES
 ET DE L'ECONOMIE MARITIME

 DIRECTION DES PECHEES MARITIMES

N°^{N°} 00606 MPEM/DPM/DPI/mgc

Dakar, le 1^{er} JUIL 2023

Le Directeur

Objet : Lettre d'introduction d'une Consultante.

Mesdames, Messieurs,

Le Ministère fédéral allemand de la coopération économique et du développement (BMZ) a engagé Poseidon Aquatic Ressource Management Limited, bureau international d'études dans le secteur de la pêche (www.consult-poseidon.com), pour mener à bien un projet d'évaluation des potentiels des accords de partenariat pour une pêche durable (APPD) entre l'UE et des pays tiers pour le développement durable des secteurs halieutiques locaux.

Cette étude couvre plus spécifiquement quatre pays dont le Sénégal, et **Madame Minata DIA** a été recrutée par POSEIDON comme Consultante Nationale pour mener la partie de cette étude relative au Sénégal. A cet effet, elle doit rencontrer les principales parties prenantes concernées par la mise en œuvre de cet APPD au Sénégal.

Pour cela, je compte sur votre entière collaboration et vous saurais gré des dispositions qu'il vous plaira de prendre pour lui faciliter l'exécution de sa mission.


Je vous prie d'agréer, **Mesdames et Messieurs**, l'assurance de ma considération distinguée.

Pièce jointe :

- Liste des personnes à rencontrer

Ampliation :

- MPEM (ATCR)



Diène FAYE

Direction des pêches maritimes, sphère ministérielle Ousmane Tanor DIENG, Bâtiment D Diannadio
 e-mail : dpm@mpem.gouv.sn, site web: www.dpm.gouv.sn

Appendix 2 : List of people/entities interviewed and timetable for the assignment

Entity	First name and surname	Function	Meeting dates and times
Ministry of Fisheries and Maritime Economy	Edouard NDECKY	CEP Coordinator	20/07/23 at 10 h
	Alpha Ibrahima Ba	Director ERS/Senegal	20/07/23 at 1 pm
	Diène FAYE	Director of Maritime Fisheries	21/07/23 at 3 pm
	Adama FAYE	Director of Inland Fisheries	19/07/23 at 10 a.m.
	Sellé MBENGUE	Seabed Director	18/07/23 at 10 a.m.
	Commander Ibrahima DIAW	Director of Fisheries Protection and Surveillance (DPSP)	09/08/23 at 10 a.m.
	Ablaye DIOUF	Director of Fishing Processing Industries	18/07/23 at 6 pm
	Moussa CISSE	RAF for sectoral support	20/07/23 at 3 pm
	Sidiya DIOUF	Internal DPM coordinator	
	Mbenda DIAGNE NDIAYE	Director of Legal Affairs and Cooperation, Agence Nationale des Affaires Maritimes (ANAM)	04/08/23 at 10 am
	Ndiaga THIAM	Director of CRODT	21/07/23 at 11 a.m.
	Ibrahima DIOUF	Head of Industrial Fishing Division	Focal point (daily interaction)
European Union Delegation	Arnaud APPRIOU	European Union Fisheries Attaché	
EU Ship Consignors	Abdoulaye Badji	Head of Société Sénégalaise de Consignation et Manutention (SSCM)	1 ^{er} /08/23 at 5 pm
	Gérémi MAZ	DG ALTAMAR	25/07/23 at 3 pm
	Samba DIEYE	DGA SOCOTRA	25/07/23 at 11 a.m.
OP	Mactar THIAM	General Secretary UPAMES	21/07/23 at 7 pm
	Diaba DIOP	President of REFEPAS	24/07/23 at 10 a.m.
	FALL Modou	Chairman UNAGIEM	24/07/23 at 7 pm
	Alassane DIENG	General Secretary GAIPES	24/07/23 at 3 pm
	Ablaye SAMBA	Technical coordinator FENAGIE PECHE	25/07/23 at 10 a.m.

	Babacar Sarr	General Secretary CONIPAS	25/07/23 at 5 pm
NGO	Moussa MBENGUE	Executive Secretary ADEPAS	24/07/23 at 1 pm
	Gaoussou Gueye	Chairman CAOPA	29/07/23 at 11 a.m.

Appendix 3 : Main civil society organisations and NGOs involved in fisheries in Senegal

OSC	Year of creation and number of members	Vocation	Activities
GAIPES Groupement des Armateurs et Industriels de la Pêche au Sénégal (Group of Fishing Shipowners and Processors in Senegal)	<ul style="list-style-type: none"> Created in 1985 Comprising 23 fishing companies Fishing fleets; Plants (fish processing industry); Tuna cannery. 	<ul style="list-style-type: none"> Strengthening licences for understanding and solidarity between our members Defending the common interests of member companies Informing, raising awareness and promoting practices Foresight, monitoring and alerting on the evaluation of the sector Partnership development 	<ul style="list-style-type: none"> Blood donation CSR corporate citizenship Participation in stock regeneration initiatives Installation of artificial reefs (reform boats) The fight against illegal fishing licences
UPAMES Union Patronale des Mareyeurs Exportateurs du Sénégal (Employers' Union of Senegalese Seafood Exporters)	<ul style="list-style-type: none"> Created in 1992 Made up of 25 Senegalese companies Membership criteria: approval to export to the EU 	<ul style="list-style-type: none"> Defend the material and moral interests of industrialists (shipowners and shore-based industries); To make proposals to the Government for the implementation of fisheries policies; Contributing to the national economy; Promoting sustainable, professional fishing by acting throughout the export value chain Exporting to Europe. 	<ul style="list-style-type: none"> Creation of a sustainable fishing label (beg ëllëk) ; Promotional activities (marketing plan to increase exports to the EU in partnership with CIBA); Organisation of and participation in international trade fairs and exhibitions such as the Global Sea Food expo in Brussels; Participation in PA activities (financing octopus dipping campaigns); Proposed management plans for shrimp and octopus ; Participation in the negotiation of fisheries agreements with the EU and other countries and in the Joint Committee.
CONIPAS National Interprofessional Council for Artisanal Fishing in Senegal	<ul style="list-style-type: none"> Created on 17/8/ 2003 Composed of 11 organisations of AP professionals with a total membership of 110,000 people involved in AP 	<p>Consultation and advisory framework for the fishing industry</p> <ul style="list-style-type: none"> fishing fish trade transformation carpenter related professions 	<ul style="list-style-type: none"> Raising awareness Training Advocacy Financing Management Representation of small-scale fishing stakeholders on the licensing committee and on the Ministry's

			decision-making bodies.
FENAGIE/Fishing National Federation of Fishing Economic Interest Groups	<ul style="list-style-type: none"> Created on 06 August 1990 Made up of 17,000 members grouped together in 2,700 economic interest groupings (EIGs) 	<ul style="list-style-type: none"> Advocate for the recognition of fishermen's rights and the defence of their interests; Improve the social position of fishing professionals and strengthen their bargaining power; Improve the working conditions of those involved in small-scale fishing (safety at sea, new technologies, equipment and infrastructure, etc.) and defend the interests of members; To promote the rational management of fisheries resources and the protection of the marine environment; Helping to improve living conditions for fishing communities. 	<p>Implementing resource management and economic strengthening projects for members;</p> <p>Capacity-building for small-scale fishing professionals.</p>
UNAGIEM Union Nationale des GIE, Mareyeurs du Sénégal (National Union of Economic Interest Groups and Fishmongers of Senegal)	<ul style="list-style-type: none"> Created in 1998 Made up of 800 MSEs 	<ul style="list-style-type: none"> Helping its members Defend the material and moral interests of its members Creating a supportive environment for members Looking for growth niches 	<ul style="list-style-type: none"> Creation of savings and loan mutuals and 2 multi-service and housing cooperatives Setting up a health mutual Literacy and training More lorry-loaded fish products
REFEPAS Network of Artisanal Fishing Women in Senegal	<ul style="list-style-type: none"> Created on 27 November 2010 Member of the African Fishing Women's Network Set up with the support of COMHAFAT, which brings together 22 	<ul style="list-style-type: none"> To work towards empowering women in small-scale fishing and the sustainable development of fisheries and aquaculture in Senegal To contribute to cooperation between women in Senegal's small-scale fishing industry, to strengthening their political and professional capacities, to promoting their members with a 	<ul style="list-style-type: none"> Capacity building Advocacy Savings and credit Support for fishmongers Development of small-scale processing sites

	<p>countries.</p> <ul style="list-style-type: none"> Made up of small-scale fishing women who are members of 5 professional organisations (FENEGIE PECHE, FENATRAMS, FENAMS, UNAGIEM, CNMDS). Member of the national advocacy coalition for transparency in the management of small pelagics. 	<p>view to their active participation in public fisheries policies and in the sustainability of fisheries and aquaculture.</p>	
WADAF	<ul style="list-style-type: none"> Founded in 1992 by several African NGOs and a French consultancy firm 16 West African countries: Benin, Burkina Faso, Cape Verde, Côte d'Ivoire, Gambia, Guinea Bissau, Guinea Conakry, Liberia, Mali, Mauritania, Niger, Nigeria, Senegal, Sierra Leone, Togo and Ghana. 	<ul style="list-style-type: none"> To strengthen the political, professional and organisational capacities of artisanal fisheries professionals (OPPA) so that they can make a greater contribution to fisheries policies in West Africa; To participate in the promotion of sustainable small-scale fishing with a view to contributing more effectively to the socio-economic development of West Africa; Working to improve working and living conditions for small-scale fishing professionals in West Africa. 	<ul style="list-style-type: none"> Pleas Training Design, implementation, monitoring and evaluation of small-scale fishing projects
CAOPA	<ul style="list-style-type: none"> Created in March 2010 in Banjul, it was officially recognised in 2013 by the Senegalese Government by Order no. 010046 of 01.07.2013, published in 	<ul style="list-style-type: none"> Stimulate an African dynamic for the development of sustainable small-scale fishing for the well-being of small-scale fishing communities, and contribute to the food security of populations 	<ul style="list-style-type: none"> Pleas Training Publications Design, implementation, monitoring and evaluation of small-scale fishing projects

	<p>the Journal Officiel.</p> <ul style="list-style-type: none"> • CAOPA brings together 24 organisations from the following countries: Benin, Burkina Faso, Burundi, Cabo Verde, Côte d'Ivoire, Gambia, Guinea Bissau, Guinea, Liberia, Mauritania, Mali, Nigeria, Morocco, Togo, Tunisia, Sierra Leone, Senegal, Uganda, FPAOI (Madagascar, Seychelles, Comoros, Mauritius, Reunion (observer member)) 		<ul style="list-style-type: none"> • Representation on international fisheries bodies (e.g. FAO).
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Appendix 4 : Advisory bodies and commissions for sea fisheries

Entity	Emanation and Missions	Composition	Importance for the SFPA
CLPA (Local Artisanal Fishing Council)	<p>Article 5 - The Minister responsible for Maritime Fisheries may, by decree, set up local artisanal fishing councils in the regions. The State representative chairs the Council.</p> <p>Article 6 - The tasks of the local artisanal fisheries councils are :</p> <ul style="list-style-type: none"> • giving advice on all matters relating to small-scale fishing activities in the locality concerned and on matters relating to fisheries management at national level; • provide information to artisanal fishermen on all measures relating to sea fishing in their locality; • organise local fishermen to prevent and resolve conflicts between fishing communities and between fishermen using different fishing methods; • Participate in the development and implementation of local fisheries management plans and the local fisheries monitoring, control and surveillance system; • promote good practice in the hygiene, health and conservation of fish products; • to promote local initiatives in fisheries co-management; • to request an opinion from the Conseil national consultatif des Pêches maritimes on all matters relating to fishing in their respective localities; • to request assistance from the National Advisory Council for Sea Fisheries in resolving fishing-related problems in their respective localities. 	<p>Article 7 - Each council is made up of local representatives of the Administration, local elected representatives, notables, artisanal fishermen, fish farmers, processors, fishmongers and other fishing trades, as well as associations of players in the sector. Local representatives of the Administration are appointed by the Governor, on the proposal of the Head of the Regional Fisheries and Surveillance Service concerned. Local authority representatives are appointed by the competent bodies. Representatives of small-scale maritime fishing stakeholders are appointed by their local communities. The State representative appoints the Co-ordinator on the recommendation of the stakeholder representatives. The Chairman may invite any person whose presence he considers useful to attend Board meetings.</p> <p>Article 8 - The rules governing the organisation and operation of local artisanal fisheries councils are laid down by order of the Minister responsible for Maritime Fisheries.</p>	<p>Established by Law 2015-18 of 13 July 2015 on the Maritime Fishing Code, the CLPAs can be used, among other things, as relays for raising awareness and disseminating information on fishing agreements.</p>
CNCPM (National Advisory Council on	<p>Article 3 - The Conseil National Consultatif des Pêches Maritimes (National Advisory Council for Sea Fisheries),</p>	<p>Article 4 - The Conseil national consultatif des Pêches maritimes is chaired by the</p>	<p>In accordance with its remit, the</p>

<p>Sea Fisheries)</p>	<p>set up by Article 22 of Law No. 2015-18 of 13 July 2015 on the Maritime Fishing Code, is responsible for:</p> <ul style="list-style-type: none"> • give prior advice on fisheries management plans; • issue an opinion on all the major issues facing the authorities in terms of the management of fisheries resources, the development of fishing activities and the organisation of the processing and marketing sector; • to give an opinion on any question submitted to it by the Minister responsible for Sea Fisheries; • to make proposals to the Minister responsible for Sea Fisheries concerning international cooperation in the field of the management and exploitation of fishery resources; • to contribute to informing and raising the awareness of those involved in the fishing industry in all areas of the sector; • to give an opinion on any question submitted to it by the local artisanal fisheries councils; • assisting local artisanal fishing councils in resolving fishing-related problems in their respective localities; • to put forward any proposals relating to better management or promotion of sea fishing. <p>The rules governing the organisation and operation of the Conseil National Consultatif des Pêches Maritimes are set by order of the Minister responsible for Maritime Fisheries.</p>	<p>Director of Maritime Fisheries. The following are members of the Board:</p> <ul style="list-style-type: none"> • the Director of Fisheries Processing Industries ; • the Director of Inland Fisheries ; • the Director of Seabed Management and Exploitation ; • the Director of Fisheries Protection and Surveillance ; • the Director General of the Agence Nationale des Affaires maritimes ; • the Director General of the Agence Nationale de l'Aquaculture ; • the Managing Director of the Société Nationale du Port Autonome de Dakar ; • the Director of the Centre de Recherches Océanographiques de Dakar - Thiaroye ; • the Coordinator of the Studies and Planning Unit ; • a representative of the Ministry responsible for the Armed Forces ; • a representative of the Ministry of the Interior; • a representative of the Ministry of Finance; • a representative of the Ministry for the Environment; • A representative of the Ministry responsible for local governance; • four representatives of shipowners and the sea fishing industry ; • three representatives of local artisanal fishing councils ; • three representatives of the artisanal fishing interprofession ; • a representative of civil society organisations ; 	<p>CNCPM can advise on the negotiation and implementation of fisheries agreements.</p>
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		<ul style="list-style-type: none"> • a representative of the fish farmers ; • a representative of the Senegalese Sport Fishing Federation. <p>The members of the Council are appointed by order of the Minister responsible for fisheries. on the proposal of the structures they represent. The Chairman may invite any person he considers appropriate to attend Board meetings. useful presence.</p> <p>The secretariat of the Board is provided by the Coordinator of the Research and Development Unit. Planning.</p>	
Fishing Licence Allocation Committee	<p>Created by Law No. 2015-18 of 13 July 2015 on the Maritime Fishing Code, which stipulates: Article 13 - The Commission shall give its opinion on:</p> <ul style="list-style-type: none"> • any matter relating to the granting of fishing licences to vessels referred to it by the Minister responsible for Sea Fisheries; • any licence application from a vessel operating for the first time in waters under Senegalese jurisdiction; • any new licence application for a vessel detained for a period of thirty (30) months; • any suspension or withdrawal of licences for reasons relating to the implementation of adopted and approved fisheries management plans, or unforeseeable changes in the state of the stocks concerned. <p>Once a year, the Commission examines, on the basis of the report from the Director of Fisheries the general situation of the licensing programme. This examination takes into consideration the fisheries management plans in force and the report of the Dakar-Thiaroye Oceanographic Research Centre on the</p>	<p>Article 11 - An Advisory Committee for the Allocation of Industrial Fishing Licences is hereby set up with the following membership:</p> <p>Chairman: the Director of Maritime Fisheries ; Secretary: the Head of the Licensing Office of the Maritime Fisheries Directorate ;</p> <p>Members :</p> <ul style="list-style-type: none"> • a representative of the Prime Minister's Office ; • the Legal Adviser to the Minister for Fisheries ; • the Director of Fisheries Protection and Surveillance ; • the Director of Fisheries Processing Industries ; • the Director General of the Agence nationale des Affaires maritimes ; • the Coordinator of the Studies and Planning Unit ; • a representative of the Ministry responsible for the Armed Forces ; • a representative of the Ministry of Finance; • a representative of the Centre de Recherches océanographiques de Dakar-Thiaroye ; • two representatives of shipowners and the sea 	<p>All licences are awarded by this committee. Article 16 of Decree no. 2016-1804 implementing Law no. 2015-18 of 13 July 2015 on the Maritime Fishing Code stipulates that: "Fishing licences are granted, following the opinion of the Advisory Commission by the Minister responsible for Sea Fisheries for a period of three years. of six (06) or twelve (12)</p>

	situation of the main fish stocks.	fishing industry ; • a representative of the artisanal fishing industry.	months, renewable.
Advisory Committee on Fishing Infractions	<p>Article 67 - In application of article 105 of law n° 2015-18 of 13 July 2015 on the Maritime Fishing Code, an Advisory Commission on Fishing Infractions is created.</p> <p>Article 68 - The Advisory Committee on Fishing Infractions advises the Minister responsible for Sea Fisheries on :</p> <ul style="list-style-type: none"> • transaction files, in accordance with the provisions of articles 105 to 112 of law no. 2015-18 of 13 July 2015 on the Maritime Fishing Code; • the amount of the bond provided for in articles 114 to 115 of law no. 2015-18 of 13 July 2015 on the Maritime Fishing Code. <p>Article 69 - The Advisory Commission for Fishing Infractions meets within forty-eight (48) hours of being convened by its Chairman.</p>	<p>For industrial fishing offences, the composition of the Commission is as follows: Chairman: the representative of the Minister for Maritime Fisheries, appointed by order. Members :</p> <ul style="list-style-type: none"> • the Director of Maritime Fisheries ; • the Director of Fisheries Protection and Surveillance ; • the Director General of the Agence nationale des Affaires maritimes ; • a representative of the Ministry responsible for the Armed Forces ; • a representative of the Ministry of Justice ; • a representative of the Ministry of Finance; • the Legal Adviser of the Ministry in charge of Maritime Fisheries ; • a representative of the industrial fishing industry, as an observer. <p>The Commission may invite to its meetings any person whose presence it considers useful</p>	Deals with fishing offences by vessels in waters under Senegalese jurisdiction

Appendix 5 : Projects/programmes of technical and financial partners/donors

Source: MPEM 2021 report

Partners	Project/programme funded and targets	Period	Amount	Objectives and expected results
Global Environment Facility (GEF) for which the FAO is the Executing Agency	The "West Africa Coastal Fisheries Initiative" project (IPC/AO), implemented in three countries (Cabo Verde, Senegal and Côte d'Ivoire).	5 years	4.2 billion CFA francs (EUR 6.5 million)	Implementation of the development plan for the white shrimp fishery and the management of molluscs through research (CRODT/IUPA) and monitoring activities at sites in the project area (Saloum islands).
Japanese government as part of the Technical Cooperation programme.	West African Fisheries Co-Management Project (COPAO). Target countries: Senegal, Mauritania, Gambia, Guinea Bissau, Guinea, Cabo Verde, Sierra Leone and Côte d'Ivoire.	Begun in April 2019, first phase completed in 2021. Closing date extended to 2024.	NA	Its aim is to consolidate and generalise co-management in Senegal, and to promote it in other West African countries.
United States Agency for International Development (USAID) and executed by Winrock International.	Dekkal Geej Project/ USAID	NA	NA	The aim of the project is to improve the management of Senegal's fisheries to ensure ecological resilience. Supporting studies on the collection and monitoring of fisheries data carried out by CRODT ; <ul style="list-style-type: none"> • A system for collecting data on catches and sales has been set up with the fisheries technical services and the Food Security Commission, to complement CRODT studies on 10 main fishing landing sites. • With regard to the collection and processing of climatic and meteorological information, a contract was signed with ANACIM to

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				<p>carry out 9 training sessions on accessing and sharing meteorological information, focusing on the CLPAs most exposed to the risks associated with climatic and meteorological hazards (around 720 beneficiaries).</p> <ul style="list-style-type: none"> • An assessment of the economic and biological impact of the installation of octopus pots by the CLPAs (Petite Côte and Saloum) in 2020 has been carried out on the basis of a perception survey and analysis of data on landings (from 2018 to 2021). • Combating IUU fishing - the project has supported the DPSP in training 54 observers to go on board industrial fishing boats. In addition, around thirty DPSP inspectors have been trained in the use and analysis of data from the Global Fishing Watch public portal.
European Union	Sectoral support as part of the implementation of the Sustainable Fisheries Partnership Agreement (SFPA) between Senegal and the European Union	2019-2024	900,000 euros per year (FCFA 590,000,000)	<p>In 2021, activities will include</p> <ul style="list-style-type: none"> - the installation of 10,000 octopus pots in the waters adjacent to the department of Mbour, an activity initiated and implemented by the departmental network of CLPAs in Mbour. Recruitment of 31 people to collect and enter statistical data as part of the implementation of the CRODT-led research support project; - the continuation of construction work on the Ndangane Sambou fishing quay.
International Maritime Organisation (IMO) and FAO with initial funding from the Norwegian Agency for Development (NORAD)	GloLitter partnership" project	2020-2023	NA	Its aim is to help developing countries reduce marine plastic waste from the shipping and fishing sectors.
CAPS	As part of the restoration of seabed habitats	August 2021	NA	Immersion of a ship as an artificial reef was organised in August 2021. This 40 m vessel (donated by CAPS) was immersed south of Cap Manuel. The installation of artificial reefs in this nursery area encourages the reproduction and protection of juvenile fish.

				They help to restore marine biodiversity for the benefit of fishing.
OMVS	Programme de Gestion Intégrée des Ressources en Eau et de Développement des Usages Multiples du bassin du fleuve Sénégal (PGIRE II))	NA	NA	<p>Its design and approach are multi-sectoral, multi-stakeholder and regional in scope.</p> <p>Objective: to support the development of water uses in the Senegal River basin in a concerted manner between OMVS member countries.</p> <p>In Senegal, the OMVS High Commission has undertaken to provide the Continental Fisheries Department with the financial and logistical resources needed to monitor the implementation of fishing activities.</p>
Belgium through its government agency ENABEL	Project to set up a training scheme for seafaring professions (PF2M)	NA	NA	<p>Components:</p> <ul style="list-style-type: none"> • specify job and qualification requirements, create or adapt job, initial and continuing training and certification reference frameworks, • designing training programmes and materials, and identifying, training and supporting trainers, • integrating training and qualifications into the legal and institutional framework • provide infrastructure and equipment for training in seafaring professions. • to set up a system for placing and integrating graduates of training centres into professional activities in the maritime sector. <p>Status: The consultant firm PAI (Port of Antwerp International) has carried out a mission to map training needs for the development of port, logistics and maritime services by the end of 2021.</p>
DER/FJ and Crédit Mutuel du Sénégal (CMS),	.	NA	2 billion CFA francs	<p>After the Head of State made a billion CFA francs available to the small-scale fishing industry under the FORCE COVID 19 Fund, a partnership was formed to raise a further billion CFA francs exclusively to finance the industry.</p> <p>In September 2021, the total amount released was 1,326,550,000</p>

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				for 566 beneficiary entities.
3FPT		NA	NA	Through 3FPT funding, MPEM players have benefited from a training programme and innovative support for the socio-economic integration of fishmongers, fishermen and women processors. A total of 2,005 players, including 1,570 women, have benefited from this programme, out of a planned target of 800 players, including 500 women. As part of the implementation of the ONP's support programme for producers and gender statistics, a workshop was held to build the capacity of producers in techniques for processing and analysing gender-disaggregated data.
MPEM	Operational upgrading of six intervention launches for the MPEM	2021	5 600 000 000 FCFA	
Indian cooperation	Refrigeration programme	NA	US\$19 million, or approximately CFAF 9.5 billion	The second phase involves 19 complexes and 76 refrigerated trucks. It began in July 2018 with a phasing by batch of 5 sites and an obligation to rehabilitate phase 1 sites at the same time as phase 2 work. The localities concerned by the second phase are: Bargny, Cayar, Mbour, Fatick, Kaolack, Foundiougne, Kafountine, Potou, Kafrine, Bakel, Médina Gounass, Sédhiou, Vélingara, Bounkiling, Louga, Podor, Aéré Lao, Thilogne and Kanel.
NA	Motorisation programme for pirogues	NA	FCFA 15 billion	The first phase of the programme was completed in 2019 with the distribution of 5,000 engines worth €5 billion. The second phase provides for the distribution of 10,000 engines for a total of 10 billion euros (2,511 engines have been distributed by the end of 2021).
Republic of Korea and Senegal	Project to build a refrigeration complex in Hann	NA	CFAF 3 billion (of which Korea (CFAF 2.5	The project includes the construction of a cold store with 3 cold rooms and an ice factory with a storage capacity of 20 tonnes.

			billion)	
Republic of Korea and Senegal	Project to acquire refrigerated lorries	NA	CFAF 2.5 billion (of which Korea CFAF 2 billion)	The project involves the acquisition of at least 55 refrigerated trucks, including spare parts and consumables. The aim of the project is to renew the vehicle fleet and improve conditions for the conservation and distribution of fish products in the interior of the country.
NA	Small-scale fishing modernisation programme	NA	FCFA 100 million	Axis 1: Project to renew wooden pirogues (CFAF 80 billion) Axis 2: Project to build semi-industrial fishing boats and oil logistics (CFAF 150 billion) Axis 3: Project to build fishing infrastructure (CFAF 100 billion); Axis4: Project to build a new dock at the port of Ndayane (CFAF 100 billion). Implementation: Société des Infrastructures de Réparation Navale (SIRN)
NA	Construction of the Boudody fishing port	NA	NA	The new port was inaugurated in May 2021. To complete the system, ANAM has undertaken to set up an ice factory with a capacity of 10 tonnes per day, which has been operational since the beginning of 2021.

Appendix 6 : The issue of live bait supply for the pole-and-line vessels

Article 3, paragraph 4 of the Protocol is clear: "Access to live bait is authorised for European baitboats under the conditions laid down by national legislation". National legislation has dealt extensively with the issue of fishing with live bait. Article 125 of Law No. 2015-18 of 13 July 2015 on the Maritime Fishing Code defined several offences qualified as very serious, including bait fishing in prohibited areas. Infringements are punishable by a fine of 20 to 30 million CFA francs for IF and a fine of 150,000 to 300,000 CFA francs for AF.

Article 5, point 4 of Implementing Decree No. 2016-1804 of Law No. 2015-18 states: "Fishing with live bait is authorised exclusively for pole-and-line tuna vessels holding a valid license, throughout the waters under Senegalese jurisdiction, with the **exception of** the zone delimited by the low-water mark and the line joining the following coordinate points: Point 1: L = 14° 40'08" N and G = 17° 25'02" W; Point 2: L = 14° 44'18" N and G = 17° 21'00" W. The conditions for fishing with live bait are laid down by order of the Minister for Maritime Fisheries.

In accordance with the law and its implementing decree, Order No. 007225 of 30 March 2018 set the conditions for the fishing of live bait by pole-and-line tuna vessels in waters under Senegalese jurisdiction. Article 2 invites Senegalese pirogue fishermen to fish for live bait, while stipulating that vessels may be assisted by one or more AF boats, on the basis of a binding contract (art 3). It is the inclusion of pirogues in live-bait fishing without supervision or guidance that has created disorder in Hann Bay.

The law could have been more restrictive when it came to fining small-scale fishing pirogues that did not comply with the regulations in their contract to supply bait to pole-and-line vessels. This contract is governed by Article 5: assistance by an AF boat for live bait fishing must be provided by means of a 16 mm stretched mesh revolving net held by the pole-and-line vessel. The Decree's description of the prohibited zone should be simpler and more explicit, clearly indicating "Hann Bay" (nursery and spawning area).

However, despite these shortcomings, it must be acknowledged that live bait fishing does not suffer from a lack of supervision in terms of Senegalese legislation and regulations. It does suffer from a problem of organisation and a lack of enforcement, because the Senegalese pirogues recruited to fish for bait have become, along with other pirogues without a contract, professional fishers of juveniles in the Hann Bay targeting other end markets (in particular fishmeal factories and artisanal processing sites).

The regulations on live bait fishing in Hann Bay (banning fishing in this area) have been effectively applied by Senegal since 2022. Pole-and-line fishing has almost come to a standstill due to the lack of access to quality live bait at lower cost. The report of the annual meeting of the Joint Scientific Committee (JSC) on the Senegal-EU Fisheries Agreement, held in Madrid from 24 to 26 January 2023, recommends: "Especially for social reasons, it is urgent and necessary to introduce transitional management measures, in collaboration with the management committee of the Marine Protected Area (MPA), pending the recommendations that will result from the CRODT²⁶ study. This study concerns the analysis of the bio-ecological and socio-economic impacts of bait fishing in Hann Bay, recommended by the Joint Commission at the meeting held in Dakar on 24-25 March 2022 and commissioned by the Senegalese government."

In summary, one of the weaknesses in the implementation of the Agreement is live bait fishing in Hann Bay, which is a nursery and spawning area. The effective ban on bait fishing

²⁶ Dakar Thiaroye Oceanographic Research Centre

in this area since 2022 has made it difficult for bait boats (mainly Spanish) which, before the Agreement with the EU, benefited from a private agreement between Senegal and Spain²⁷. It is therefore essential to improve the organisation of live bait fishing between baitboats and pirogues.

²⁷ "Tàmm laago la": the habit has become second nature to these vessels, who have been fishing live bait from Hann Bay for over 20 years.

