

ACP/84/087/17

*Sustainable Economic Development and
Trade Department*

Brussels, 31 August 2017

**Item 4 of the agenda of the meeting of senior fisheries
officials**

Background Note:

**State of play of implementation of the ACP strategic Plan of
Action for fisheries and Aquaculture and its
implementing roadmap**

Background

In June 2008, the 87th African, Caribbean and Pacific Group of States (ACP) Council of Ministers called for a meeting of the ACP ministers responsible for fisheries with a view, *inter alia*, to establishing a ministerial mechanism for ACP coordination and cooperation on fisheries issues.

The first meeting of Ministers responsible for fisheries held in 2009 established the ACP Ministerial Fisheries Mechanism which overall objective and functions “*is to shore up political support both within the group and from its external partners, for new approaches to fisheries governance and cooperation in fisheries, in order to ensure that fisheries and aquaculture play their just part in the social and economic development of ACP member States*”.

In 2012, the third meeting of ACP Ministers in charge of fisheries and aquaculture recognized the need to address fisheries and aquaculture in pro-active terms. They subsequently adopted a 5-year plan of action: the ACP Strategic Plan of Action for Fisheries and Aquaculture (2012-2016) in Nadi (Fiji). The overall objective of this plan is to increase the contribution of fisheries and aquaculture to social and economic development in ACP countries.

The action plan sets out five Strategic Priority axes (each broken down into several areas):

- Effective Management for Sustainable Fisheries
- Promoting Optimal Returns from Fisheries Trade
- Supporting Food Security in ACP Countries
- Developing Aquaculture
- Maintaining the Environment

The ACP Fish II programme¹ (2009-2014) financed under the 9th European Development Fund had an overall objective of contributing to the sustainable and equitable management of fisheries and thus, leading to poverty alleviation and improving food security in ACP States. It has been the support for the implementation in ACP countries of many actions of the ACP strategic plan of action. 184 projects were funded and allowed significant improvement related to improved fisheries policies and management plans, reinforced control and enforcement capabilities, reinforced regional and national research strategies, improved business support and private sector investment and increased knowledge sharing on management and trade.

At the 4th meeting of Ministers in charge of Fisheries and Aquaculture in 2015 the Ministers reviewed a progress report on each of these axes and adopted a roadmap for the implementation of the strategic plan of action and renewed the latter for the period 2016-2020.

Since the last meeting of ACP ministers in charge of fisheries, substantial landmark international developments have materialised such as the entry into force on 5 June 2016 of the FAO Agreement on Port State Measures to Prevent, Deter and Eliminate Illegal, Unreported and Unregulated Fishing; the adoption in 2015 of the United Nations 2030 Agenda for sustainable development and the resulting Sustainable Development goals, in particular SDG 14 “Conserve and sustainably use the oceans, seas and marine resources for sustainable development”; the Paris Agreement on Climate Change (COP 21 - the Paris Agreement entered into force on 4 November 2016) and Marrakesh Climate Change Conference (COP 22).

¹ ACP FISH II Final Report – The implementation of ACP Fish II Programme (2009-2014), January 2014

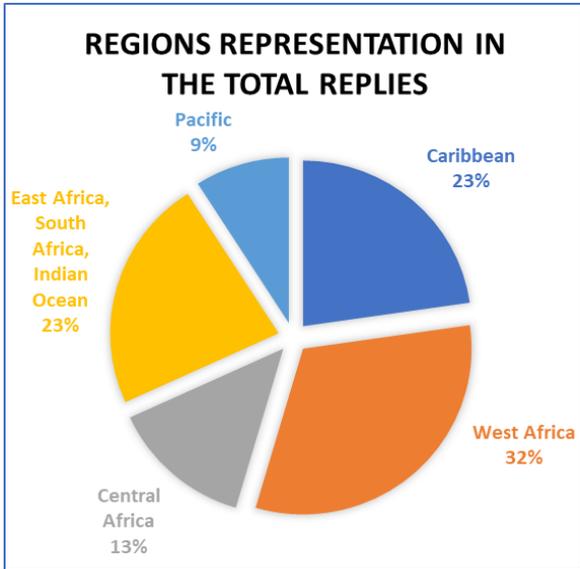
The Strategic Plan of Action for Fisheries and Aquaculture 2012-2016 and its implementing Roadmap are shown in Annex 1 and 2 respectively.

Methodology

In order to monitor the progress made regarding the implementation of the strategic action plan and its relating roadmap, the main tool utilised was a questionnaire sent in May 2017 to all focal points designated by ACP Member States, with support of the ACP Secretariat in Brussels. The different sections of the questionnaires were shaped in line with the roadmap adopted in 2015 for the implementation of the action plan and, where relevant, pointed to the latest developments at international level. The questionnaire was submitted to all ACP States in both English and French is shown in annex 3.

As of end June 2017, 22 replies have been received representing 27% of the total number of ACP States.

The following graphs show questionnaire response rates by region.



Source: fisheries questionnaire ACP 2017

The responses to the questionnaire sent in May 2017 were compiled and analysed. They detail the progresses made by responding ACP States regarding the strategic priorities identified in the Plan of Action and its relating roadmap.

In the following sections, the state of play of the implementation of the ACP Strategic Plan of Action is structured following the five axes of the action plan and their related actions..

However, the assessment of the state of play of the implementation of the ACP Strategic Plan is hampered by the following main factors:

- The response rate to the questionnaire (22 out of 79 countries, i.e. 27% have responded) is low and does not allow very precise conclusions to be drawn, neither at the scale of the ACP group of States in general, nor for certain ACP regions for which regional response rate is lower than average (e.g. Central Africa or Pacific where only two countries replied).

- In the absence of time-bound target results indicators² defined ex-ante, the assessment of the state of play of the implementation of ACP Strategic Plan of Action for fisheries and aquaculture is necessarily qualitative. The Strategic plan did not define quantitative targets which could support evaluation. For example, concerning National governance framework, the Action Plan does not indicate a target number of ACP countries having updated their management framework as success criteria.
- The difficulties in assessing further the state of play of the implementation of the ACP Strategic Plan are compounded by the fact that actions to be implemented are generally defined in broad terms with qualitative appreciations. For example, it is not possible to evaluate the extent to which “*States have adopted effective management system that reflects the realities and level of development of the country*” (PFR 1, action 2) without detailed analysis and prior definition of what can be an effective management system from a sustainability perspective.

Bearing in mind these methodological restrictions, the state of play of the implementation of the ACP Strategic Plan of Action is structured following the five axes of the action plan and their related actions incorporating contributions received from responding ACP States complemented by information gathered in the literature. Relevant national and regional initiatives for sustainable fisheries and aquaculture development have been highlighted (framed in the text) when they are found to be relevant within ACP context.

Strategic Priority 1: Effective Management for Sustainable Fisheries

Fisheries and aquaculture provide livelihoods for hundreds of millions of people. Sustaining the capacity of world fisheries to provide food and jobs requires effective management³. Several threats to sustainable fisheries were identified by ACP countries and in particular,

Illegal, Unregulated and unreported (IUU) fishing and overcapacity of fishing fleets. ACP countries have come to the conclusion that improved governance systems would ensure sustainability of fish stocks.

The action plan adopted in 2012 emphasises the necessity to assess national fisheries management regimes and to draw up fisheries management frameworks.

In 2015, improvements were noted concerning national management frameworks (PFR1) particularly the involvement of stakeholders in the management processes and institutional capacity building. The need to access data and knowledge, the capacity to analyse these data, the management of fishing rights as well as the control tools (monitoring, control and surveillance) have been highlighted as areas for improvement (PFR2).

Because some key fish stocks are shared between the waters of several states, cooperation at regional level was identified as necessitating to be increased. Cooperation and coordination between States within bilateral or multilateral agreements or regional fisheries organisation

² Indicators are mentioned in the introduction part of the roadmap adopted in 2015 but they have not been defined.

³ Many millions of people around the world find a source of income and livelihood in the fisheries and aquaculture sector. The most recent estimates indicate that 56.6 million people were engaged in the primary sector of capture fisheries and aquaculture in 2014. The State of World Fisheries and Aquaculture, FAO 2016

through increased participation of ACP states has been considered as improved during the last fishery ministers (PFR3). The need to enhance compliance with regional management and conservation measures and recommendations of international agreements was emphasised (PFR4). Note that the ACP FISH II Programme (2009-2014) dedicated 60% of its budget to improve fisheries management both at the national and regional levels by supporting the development, review and update of fisheries policy instruments⁴.

PFR 1: National management framework: update the management frameworks and involve fishing communities, fishermen and processors in sustainable fisheries management through sustained public education, sensitization, meetings, etc.

- In West African region, national management frameworks for fisheries have been adopted/updated, or are about to be implemented in most of the replying countries. Remaining difficulties are nevertheless still highlighted especially due to financial and technical constraints. Co-management with stakeholders is broadly mentioned as part of the process before adopting new rules concerning fisheries management.
- In Eastern Africa, Southern Africa and Indian Ocean Region, there is a general adoption or updating of national framework. Consultations with stakeholders is generalised. For instance, Madagascar has adopted management plans for coastal fisheries with stakeholders' consultation and Kenya empowers the Beach Management Units in the policy making process.

The *Indian Ocean Artisanal Fishermen Federation* was created in order to reinforce capacities of small scale fishermen from 5 countries in the decision-making processes of South West Indian Ocean at regional and international levels. This initiative benefited from Smartfish Program.

- In the Central African Region, there is an example of new legislative framework based on an audit of its fisheries sector. New legislative texts are being adopted concerning the creation of marine protected areas (parks and reserves). In Cameroon, the legal system already includes different fisheries management plans. The law for fisheries and aquaculture is under review. Co-management with artisanal and industrial fishermen is in place (for instance through dedicated committees).
- In the Pacific Region, one respondent emphasised adoption of a recent new fisheries law in 2016 the scope of which is to regulate and control conservation, management or development of fisheries and licensing of national and foreign flagged vessels. Stakeholder organisations at the levels of communities and villages were integrated in the fisheries and aquaculture legal framework as they appeared to offer the most appropriate level of consultation. Tonga has adopted the Tonga Fisheries Sector Plan which is a long-term plan updating and enhancing the management framework for fisheries. It lays out a framework for a ten-year investment in fisheries. The stakeholder engagement is currently under review by the Pacific Islands Forum Fisheries Agency.
- In the Caribbean Region, some new approaches are apparent according to replies received. In several countries, new fisheries legislation is in preparation and the number of staff dedicated to fisheries management has increased. In the Bahamas for

⁴ ACP FISH II Final Report – The implementation of ACP Fish II Programme (2009-2014), January 2014

instance, an assessment of the fisheries data was completed in 2014 and is now being used to design and pilot a modern data management system, which will form the basis of a sustainable fisheries management system. The Caribbean Regional Fisheries Mechanism (CRFM) and the United Nations Food and Agriculture Organization (FAO) are working together to strengthen data collection and management systems for fisheries in Caribbean countries.

According to the replies fisherfolks, fishers, fishing community are also broadly involved in these processes.

The *Caribbean network of Fisherfolk Organisations (CNFO)* is a network of small scale fisherfolk organisations operating in the Caribbean Region. Its mission is to improve the quality of life of fisherfolk and develop a sustainable and profitable industry. It is engaged as a partner in regional capacity building projects aiming at strengthening fisherfolk to participate in governance projects (Strengthening Caribbean Fisherfolk to Participate in Governance -SCFPG- project)

PFR 2: Addressing key threats to sustainable fisheries management: develop and implement national plan of action against IUU fishing and develop and implement Monitoring, Control and Surveillance plans

- In the West African region, Responding States reported that Monitoring, Control and Surveillance (MCS) plans are in place. In addition, States mentioned existence of joint surveillance missions with cooperation between different national services, for both marine and inland fisheries (such as in Burkina Faso). In 2016, surveillance campaigns have been organised at regional level by the Sub-regional Fisheries Commission (SRFC) (funded by the EU GOWAMER project) involving operational means from Gambia, Guinea Bissau, Guinea and Senegal.

In East Africa, Southern Africa and the Indian Ocean Region, half of the responding countries are also implementing MCS plans. The others are updating/developing their MCS plan. Strengthening surveillance and policing of EEZ and territorial waters is earmarked under the fisheries sectoral support under the Fisheries Partnership Agreements concluded between the EU and several Indian Ocean coastal States. A regional monitoring, control and surveillance coordination centre for SADC (Southern Africa Development Community) has been established to train national monitoring control and surveillance centres.

- In the Central African Region, the majority of responding countries have implemented Monitoring Control and surveillance schemes. However, one respondent reported that there was no development for the time being.
- In the Pacific Region, MCS dedicated to tuna fisheries is in place in Samoa. Joint MCS systems are well developed in the region, with central support at regional level through Pacific Islands Forum Fisheries Agency (FFA) and Western and Central Pacific Ocean Fisheries Convention (WCPFC).
- In the Caribbean Region, the majority of the replying countries have MCS measures in place. For instance, Belize has developed a national fisheries enforcement strategy and enforcement training manual. Catch logbooks have been developed and implemented for national artisanal fishing vessels. A project is currently underway to

install vessel tracking devices on all local fishing vessels as another measure to control and reduce illegal fishing and as a safety mechanism for fishers.

PFR 3: Complying with international recommendations, agreements and guidelines: Harmonise the legal and policy framework of the country

- In West Africa, all of the replying countries have aligned their legal frameworks with international instruments. For several responding countries, this is done through West African Economic and Monetary Union (UEMOA) directives. National Plans of Actions (NPOA) against IUU have been adopted by concerned countries.
- In East Africa, Southern Africa and the Indian Ocean Region, some countries reported having recently adopted new fisheries laws in line with international agreements. Other countries are reviewing their legislation. For example, according to an NGO⁵, vessels applying for a licence in Kenya are now required to provide information concerning the owner of the vessel. To date, three vessels have been denied authorization to fish in Kenyan waters. Information sharing with RFMOs and other Coastal States plays a key role in fighting IUU fishing. Uganda, Kenya & Tanzania have agreed to implement regional patrols to remove illegal fishing gear and to increase compliance with fisheries regulations and licensing of fishers in the Lake Victoria under the SmartFish⁶ programme. After ten years of implementation, the regional plan for fisheries surveillance (PSRP) in the Southwest Indian Ocean involves eight neighbouring countries (Comoros, France, Kenya, Madagascar, Mauritius, Mozambique, the Seychelles and Tanzania) and covers 6.4 million km². It has significantly reinforced surveillance in the maritime zone and improved the exchange of information on fishing activities⁷.
- In the Central African Region, all the responding countries are engaged in the process of ratification of FAO Port State Measures Agreement (PSMA).
- In the Pacific Region, Samoa responded that it implements international recommendations, agreements and treaties including conditions for certain types of gear and activities. Samoa is currently undertaking a gap analysis on its regulatory framework and capacity against the requirements of the FAO PSMA. It is of note that the implementation of the FAO PSMA may place a significant administrative burden on fisheries administration in some Small Island Developing States (SIDS) due to the large amounts (in some cases 400,000 tonnes plus per annum) of tuna products transhipped in their ports.
- In the Caribbean Region, the responding countries have mostly integrated international measures in their national legal systems, although one State acknowledges the need to review its existing fisheries act is currently in progress.

⁵ Source: FISH I Africa⁵.

⁶ The IOC-SmartFish Programme involves 20 countries in East and Southern Africa as well as the Indian Ocean region. It is managed by the Indian Ocean Commission (IOC) and has implemented regional Fisheries surveillance plan in this region.

⁷ The PSRP is implemented by the IOC through the SMARTFISH programme and is funded by the EU.

PFR 4: Regional cooperation and partnerships: Enhance regional cooperation through inter alia South-South cooperation, notably in relation to the success achieved and create synergies among the various strategic frameworks

- In West Africa, responding countries are all cooperating through several regional bodies related to fisheries. In particular, coastal States are parties to the Sub-Regional Fisheries Commission (SRFC), the Fisheries Committee for West Central Gulf of Guinea (FCWC/CPCO), Ministerial Conference on Fisheries Cooperation among African States Bordering the Atlantic (ATLAFCO). Regional economic integrations organisations (JEMOA, CEDEAO) also endeavour to implement regional common fisheries policies.
- In East Africa, Southern Africa and Indian Ocean Region. South-South cooperation is developing through the Indian Ocean Commission (IOC) and through the South West Indian Ocean Fisheries Commission (SWIOFC)
- In the Central African Region, mechanisms to strengthen South-South cooperation are developed at international and continental levels (African Union, New Partnership for Africa's Development (NEPAD)) and regional level South-South (ATLAFCO and the *Commission Régionale des Pêches du Golfe de Guinée* (COREP) which is the specialized recognized institution in fisheries and aquaculture matters for the Central African Region (ECCAS) and the Fisheries Committee for West Central Gulf of Guinea (FCWC). Some countries note that due to insufficient financing and logistical means, the actions developed under these bodies remains limited.
- The Policy Framework and Reform Strategy (PFRS) for fisheries and aquaculture in Africa launched by the African Union (implementation coordinated by AU-IBAR and supported under the EU FISHGOV project) has been formulated with the main purpose of facilitating coherent policy development for the sustainable management of fisheries and aquaculture resources in the Member States of the African union. The PFRS provides guidance on good governance principle and outlines strategic actions on which reforming African fisheries. It incorporates best practices for sustainable fisheries management and responsible aquaculture development.
- In the Pacific Region, responding countries are participating in a number of organisations or coastal States alliances like the Pacific Islands Fisheries Forum Agency (FFA), the Pacific Community (SPC), and the Nauru Agreement or Te Vaka Moana (TVM)⁸. The parties to the Nauru Agreement (PNA) succeeded in implementing a new fisheries management regime for tuna based on fishing effort controls (the Vessel Day Scheme)
- In the Caribbean Region, responding countries are participating in different Regional organisations. Caribbean Community and Common Markets (CARICOM's) Common fisheries policy, dated 2011, gathers all Caribbean ACP countries except Cuba. CRFM integrates 11 countries out of the 16 ACP Caribbean; Other regional organisations are Central America Fisheries and Aquaculture Organization (OSPESCA) and the SICA (Sistema de la integración centroamericana). Some responding countries have

⁸ TVM consists of a group of Pacific Island Fisheries Administrations (Cook Islands, New Zealand, Niue, Samoa, Tokelau and Tonga) cooperating to develop, manage and protect South Pacific fisheries

established bilateral cooperation with neighbouring states (such as Saint Kitts and Nevis).

- Concerning fisheries for highly migratory species, ACP States cooperate between themselves and with distant fishing nations, under a multilateral context of relevant Regional Fisheries Management Organisations, including International Commission for the Conservation of Atlantic Tunas (ICCAT) in the Atlantic, Indian Ocean Tuna Commission (IOTC) in the Indian Ocean and WCPFC in the Western Central Pacific.

Lessons learnt and challenges for the future

The general trend to be noted concerning fisheries governance is that the States have continued the improvements already detected in 2015. Most responding countries have updated their legislation or are in the process of revision. Co-management is broadly recognised as part of the decision-making process in fisheries management.



Source: fisheries questionnaire ACP 2017

However, the level of control of fishing activities among responding countries is not homogeneous. Monitoring, control and surveillance schemes are said to be in place in 75% of the responses.

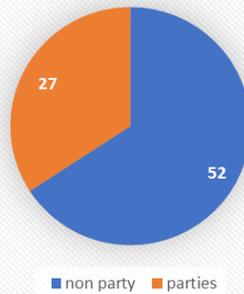
The fight against IUU remains an ongoing issue and a high priority for ACP countries. The Agreement on Port State Measures to Prevent, Deter and Eliminate Illegal, Unreported and Unregulated Fishing was approved by the FAO in 2009. The Agreement entered into force on 5 June 2016. It is the first-ever binding international agreement specifically targeting IUU fishing.

It should be noted that out of 48 parties to the FAO IUU PSMA, 56% are ACP group members. 27 ACP countries are parties⁹ 34% of the ACP countries are parties to this agreement which rises to 42% for the non-landlocked ACP countries. Other ACP countries having significant numbers of foreign fishing vessels calling in their ports should be encouraged to ratify or access the Agreement.

Some responding countries and particularly SIDS have emphasised that the international obligations against IUU fishing and in particular the implementation of the FAO PSMA may place a significant burden on fisheries administrations.

⁹ In addition, four ACP countries have signed the FAO PSMA but not yet ratified.

ACP countries Parties to FAO PSMA



Source : <http://www.fao.org/fishery/psm/agreement/parties/en> update 22 June 2017

There is a broad participation of ACP countries in regional and international organisations - either economic integration or regional fisheries bodies. There are established frameworks for South-South cooperation in the different regions that are used to various extents, depending of the regions concerned.

Strategic Priority 2: Promoting Optimal Returns from Fisheries Trade

According to the FAO¹⁰, international trade plays a major role in the fisheries and aquaculture sector as an employment creator, food supplier, income generator, and contributor to economic growth and development, as well as to food and nutrition security. Fish and fishery products continue to be one of the most traded food commodities for ACP countries exports. Fish exports trade in some of the ACP countries is worth more than half of the total commodity exports. More than 60 of the ACP States are engaged in the export of fish and fishery products to the international markets, representing an important contribution to their local economies and employment¹¹.

Promoting ACP fish trade via access to markets under favourable conditions, particularly to the EU market, is ensured through the Cotonou Partnership Agreement, Economic Partnership Agreements (EPA). All the exports from LDC benefit from the “Everything But Arms” (EBA) arrangements which give ACP originating fish and fishery products duty-free and quota-free access to the EU market. Some ACP countries may also benefit from particular access conditions, in particular for those which are not least developed countries (LDC) and not yet party to an EPA (e.g. Cabo Verde).

ACP countries have underlined that regulations relating to food safety and quality, food hygiene, packaging, traceability, labelling requirements and rules of origin can become a barrier to trade for member States which often lack the resources to conform.

During the last meeting of ministers in charge of fisheries and aquaculture in 2015, it was noted that improvements on market access were still insufficient (PFR 5) even if progress has been made in overcoming technical barriers such as technical standards and Sanitary and Phytosanitary (SPS) issues of food safety or catch certification systems under EU’s regulation

¹⁰ The State of World Fisheries and Aquaculture, FAO 2016

¹¹ Statement addressed by M. Gnassounou, Assistant Secretary General in charge of the Department of Sustainable Economic Development and Trade at the opening of the Oceans Forum on trade-related aspects of Sustainable Development Goal 14, Geneva, March 2017

related to the fight against IUU fishing (PFR 6). It was mentioned that piracy was still cause of loss of value, especially in the Gulf of Guinea (PFR 7). Studies were needed on ways to improve the value chains (PFR 8). ACP countries were also asked by the plan of action 2012 to emphasise in WTO negotiations that in view of their special situations they should benefit from a special and preferential treatment in respect of the overall prohibition of fisheries subsidies¹².

PFR 5: Access to market: enhance competitiveness of ACP countries, defend the ACP position at the WTO negotiations, improve market access for ACP processed fish products by introducing, among others, more flexible rules of origin

- All the countries in West Africa are members of the WTO. Responding countries acknowledge that improving access to market is an issue which their administrations are working on. West Africa is the EU's largest trading partner in Sub-Saharan Africa and the EU is West Africa's biggest trading partner. It is the main export market for West African raw or processed fishery products). Mauritania, (not being a member of the Economic Community of West African States (ECOWAS)) and ECOWAS initiated an Association Agreement on 5 May 2017 to define the country's participation in ECOWAS' trade policy. Pending a Regional EPA with West Africa, EPA with Côte d'Ivoire and Ghana entered into provisional implementation to ensure continued duty-free quota-free access to the EU market particularly benefits many of the priority sectors in Cote d'Ivoire and in Ghana's National Export Strategy including fish.
- In East African, South African and Indian Ocean region, twenty countries are WTO members, four are observers and one is not a member. Concerning the Eastern and Southern Africa (ESA) Region, an interim EPA was signed in 2009. One particular feature of this EPA is that it includes a fisheries chapter that frames cooperation in the fisheries and aquaculture sector between the EU and its ACP trading partners. Burundi, Kenya, Rwanda, Tanzania, and Uganda have signed an Economic Partnership Agreement between the East African Community and the EU. The EPA includes also provisions for reinforcing cooperation on fisheries. The EPA between the whole Southern African Development Community (SADC) EPA Group including South Africa and the EU was signed on 10 June 2016.
- All Central African countries are members of WTO or have observer status (2 countries). In the Central African Region, the EU is currently in negotiations for an EPA with Cameroon, the Central African Republic, Chad, Congo, the Democratic Republic of Congo, Equatorial Guinea, Gabon, São Tomé and Príncipe. However, no comprehensive agreement could be reached so far, and only Cameroon has entered into an interim EPA with the EU. As Least-Developed Countries, Chad, the Central African Republic, the Democratic Republic of Congo, São Tomé and Equatorial Guinea all benefit from duty-free, quota-free EU access under the EU's SPG "Everything but Arms" (EBA) scheme.
- Six countries in the Pacific region are currently members of the WTO, namely: Fiji, Papua New Guinea, Samoa, Solomon Islands, Tonga and Vanuatu. Timor West is observer. 8 countries are not member. In the Pacific, the EU is currently negotiating an Economic Partnership Agreement with several ACP countries in the region (Cook

¹² See SDD 14.6 of the 2030 Agenda for Sustainable Development

Islands, Fiji, Kiribati, Micronesia, Nauru, Niue, Palau, Papua New Guinea, Samoa, the Solomon Islands, Tonga, Tuvalu and Vanuatu). The EU concluded an Interim Partnership Agreement with Papua New Guinea and Fiji in 2007. The EPA signed include a unique derogation to rules of origin, allowing signatory country to use non-originating tuna raw material for their processing industries.

- Caribbean Region: In 2015, 89% of exports from CARIFORUM countries to the EU were from the Bahamas, Belize, Guyana, Suriname and Trinidad and Tobago. All the ACP countries of Caribbean region are members of the WTO with the exception of one (the Bahamas) being observer. The CARIFORUM – EU EPA was signed in October 2008. Like the ESA EPA, the EPA with Caribbean regions includes a dedicated fisheries chapter. According to replies to the questionnaire, some countries underline the difficult access to EU markets for certain fisheries products due to lack of suitable national legislation and controls to comply with EU requirements.
- Concerning the rules of origin for fisheries products, Rules of Origin determine the originating status of fisheries and aquaculture products, and therefore condition the eligibility to preferential tariff upon import. For fisheries products, RoO are based on three main criteria that have to be cumulatively met: the flag of the vessel at the origin of the catches, the registration status of the vessel and the nationality of its owning entity. A fourth criteria concerning the composition of the crew of the originating vessel has been progressively abandoned. For aquaculture products, RoO are based on two main criteria: species born and raised in the country of origin. While basic RoO apply under EU generalized systems of preferences (GSP), ACP States could obtain some flexibility in particular under EPA. The most prominent example is the global sourcing rule negotiated under the EPA between the EU and Pacific ACP countries by which Chapter 16 processed fisheries products (chapter 16) (e.g. tuna cans) manufactured in Pacific ACP States are considered as originating irrespective of the origin of the raw material (chapter 03) used. Under other EPA, ACP States (e.g. Seychelles, Madagascar, Mauritius, Ivory Coast) could obtain through negotiation specific derogations to have contingents of non-originating tuna cans (i.e. processed out of non-originating raw material) considered as originating. Concerning aquaculture products, some flexibility has been obtained to consider as originating aquaculture products only raised in the country of origin. Nonetheless, the Cariforum EPA still includes both criteria, born and raised, as originating conditions.

PFR 6: Overcoming technical obstacles: formulate and implement national plans and build capacities to combat IUU fishing; build capacities regarding SPS measures and develop regional centres of expertise (laboratories)

- West Africa: responding countries have generalized the fight against IUU fishing and exporting countries have enforced the catch certificate system required by the EU legislation. As regard SPS measures, official control systems and testing laboratories have been developed in some of the responding countries. Some countries have also adopted specific legislations on aquatic animal health. However, some countries with significant fish export potential still struggle to meet EU sanitary requirements.
- Eastern Africa, Southern Africa, Indian Ocean: Building capacities is ongoing in the establishment of effective SPS measures, including accreditation of laboratories. According to respondents, all countries aim to upgrade their laboratories in the near future. One country continues to hire the services of foreign laboratories. Some

responding countries have nevertheless already established comprehensive sanitary control systems and participate in training programmes at regional and international level.

After ten years of implementation, the regional plan for fisheries surveillance (PSRP) in the Southwest Indian Ocean involves eight neighbouring countries (Comoros, France, Kenya, Madagascar, Mauritius, Mozambique, the Seychelles, Tanzania) and covers 6.4 million km². It has significantly reinforced surveillance in the maritime zone and improved the exchange of information on fishing activities¹³.

- Central Africa: Some responding countries have not built capacities regarding SPS whereas others have made progress. In particular, it should be noted that Cameroon states it is close to establishing a laboratory which could be seen as a regional centre of expertise.
- The Pacific Islands Forum Fisheries Agency (FFA) has just launched a feasibility study for the establishment of a South West Pacific regional competent support (RECAS) unit for Member Countries' sanitary Competent Authorities. This would facilitate sanitary controls for exported fishery products to meet the requirements of importing countries, and in particular the EU
- In the Caribbean region, the fight against IUU has been broadly embraced by several countries which have national enforcement measures in force, some of them are about to update them. In addition, some countries have cooperation between in place: Saint Vincent and the Grenadines (SVG) has established a Memorandum of Understanding with Trinidad and Tobago to certify the quality of fish catches from SVG flagged vessels, although it still does not have a sanitary competent authority in place to allow them to be inspected and listed for EU supply.
- Cooperation at regional level (in particular within CARICOM and CARIFORUM) has allowed improvements in SPS measures and regional centres of expertise. Despite this, and some major interventions in this field (see box) some responding countries indicate that they consider additional training related to SPS to be required.

The *Sanitary and Phytosanitary Measures* (SPS) Project, funded by the EU (10th EDF) and delivered under the technical leadership of IICA and the CRFM, aimed at helping CARIFORUM countries to improve the safety of fish and fishery products for consumers in national and export markets. Eight new manuals were elaborated to help fish inspectors apply the best international practices to the inspection of fishing vessels, processing establishments and aquaculture facilities. The manuals cover subjects such as Hazard Analysis and Critical Control Points (HACCP), traceability, and for the first time, a compendium of food safety hazards encountered in Caribbean fishery products. In addition, the project has prepared two manuals for laboratories, on the testing of fishery products to make sure they are safe, and ensuring that laboratory test results are accurate.

PFR 7: Coping with the main external causes of loss of value: Combat piracy

- West Africa: All the responding countries concerned are involved in the fight against piracy. In particular, the cooperation is in place in programmes of the Committee for

¹³ The PSRP is implemented by the IOC through the SMARTFISH programme and funded by the EU.

West Central Gulf of Guinea (FCWC). This includes sharing of fisheries intelligence information among participating countries. Togo has organised and hosted an extraordinary summit of the African Union (AU) dedicated to maritime safety and African development in 2016, as a result of which over 30 nations signed a binding agreement to curb piracy and other maritime crime on the continent's coastlines. In addition, 25 African ACP countries bordering the Eastern Atlantic have signed the Yaoundé Code of Conduct through which they commit to cooperate in the fight against maritime insecurity, including IUU fishing. New patrol vessels have been deployed in the area by several responding countries to combat piracy.

- East Africa, Southern Africa, Indian Ocean: combating piracy is an issue particularly for countries in this region. Some responding countries emphasise their low financial and technical capacity to fight against piracy. The Djibouti Regional Maritime Training Centre (DRTC) is used to coordinate training at regional level including in the fight to piracy. Efforts appear to have been successful as evidenced by the decrease of the number of piracy attacks over the past few years from about 50 in 2012 to almost nil in 2016. Eradication of piracy had significant positive impacts on the business climate in the region, and not only for fisheries. In 2008, the EU launched the European Union Naval Force ATALANTA (EU NAVFOR) off the Horn of Africa and in the Western Indian Ocean to fight against piracy and armed robbery. This operation, based on several UN resolutions, has made a significant contribution in deterring, preventing and disrupting pirate's activities, especially in preventing attacks before they happen. It is scheduled until December 2018. A 5-year EU funded project for fighting piracy and promoting maritime security in Eastern and Southern Africa - Indian Ocean Region has already shown results in significantly reducing piracy off the coast of Somalia¹⁴.
- Central Africa: Members of the Economic Community of Central African States (ECCAS), ECOWAS and Gulf of Guinea Commission (GGC) have created the Inter Regional Coordination centre for maritime security and safety matters and joined West Africa States in the conclusion of the Yaoundé Code of Conduct.
- Pacific: Tonga is a party to the Niue Treaty Subsidiary Agreement and working closely with regional organisations such as FFA and international communities such as New Zealand, Australia, US and France to avoid piracy and illegal fishing. The international communities provide air surveillance and patrol boats.
- Caribbean: All responding countries are working on the issue of combating piracy. Some of them are working closely with relevant governmental agencies and the NGO community to address piracy and IUU. Some are mentioning the work within RFMOs (ICCAT, CITES, IWC).

PFR 8: Value added for ACP States: improve the value of fish and fish product storage and processing methods

- West Africa: Responding States mentioned that new fish processing technologies have been successfully promoted, in particular the fish smoking oven, promoted by FAO (FTT), ice production and cool bags improvement, training centres and landing facilities (Ghana, Côte d'Ivoire, Burkina Faso, Togo, Senegal).

¹⁴ MASE Programme to Promote Regional Maritime Security: October 2013 - June 2018

- East Africa, Southern Africa, Indian Ocean: the responding countries have ongoing initiatives and budget dedicated to improving value of fish. In Kenya, nine fish landing site facilities have been constructed or upgraded between 2013 and 2017. Madagascar is organising training on processing and conservation techniques (with women). A project to reduce vulnerability in coastal fishing areas should help improve storage and conservation fish products infrastructures by the end of 2017 (IFAD funded). Botswana is encouraging the establishment of fishing camps in Lake Ngami with proper processing infrastructure and sanitation to ensure coordinated fish handling and processing to secure product quality.
- Central Africa: Some countries have improved fish storage and freezing capacities already in place (for example in Congo with the help of Japanese agency for International cooperation, JICA). In Cameroon, new preservation and processing methods have received technical and financial support (new smoking ovens, ice production, cold room, training on processing methods).
- In the Pacific, the work is in progress in the responding countries.
- Caribbean: Value added and product development is on-going in all the responding countries. Some countries have recently improved fish storage and freezing capabilities (in Saint Vincent Grenadines with the help of Japanese agency for International cooperation JICA). In the Bahamas, all processing/exporting facilities must now meet HACCP standards in order to be licenced. Belize's fishery products have benefitted from access to niche markets such as the whole cooked lobster. Through OSPESCA, there is a proposed project to establish a traceability system for the Caribbean spiny lobste

Lessons learnt and challenges for the future

There is a broad participation of ACP countries in WTO. Out of 79 countries 62 are members of the WTO and 8 are observers. Only 9 are not members.

The rise in World Trade Organisation membership accompanied with the groups' increasing role in international trade negotiations, and the conclusion of several Economic Partnership Agreements between the EU and ACP countries has supported the integration of ACP States into the world economy¹⁵.

There is an on-going work undertaken in ACP countries to improve the value-added of fish products and decrease post-harvest losses which should continue to be encouraged.

Sixteen ACP countries have been pre-identified (yellow card) under the EU's regulation to fight against IUU fishing as possible non-cooperating countries. Six of them have rectified the situation. Six ACP countries are in the procedure of verification and communication with the European Commission of the progress made. Four ACP countries have been identified (red card) as non-cooperating countries. The consequences of this identification are the prohibition to trade any fishery products with the EU and the prohibition for EU vessels to take a licence to fish in the water of the identified country or to engage in joint fishing operations with vessels flagged to this country. Two have rectified the non-compliances and the listing as non-cooperating has been withdrawn. Two ACP countries are currently listed as non-cooperating countries

Table 2: Number of countries subject to the different stages of the EU carding process

	Pre-identification	Pre-identification revoked	Identification	Delisting	Still identified
Number of third countries concerned	24	10	6	3	3
Of which ACP States	16	6	4	2	2

Source: adapted from DG MARE web site

Catch certification system have been developed in some responding countries to ensure traceability of exports of fish and fish products. It should be noted that 32 ACP countries have notified their competent authorities under EU IUU Regulation¹⁶.

The ACP group has taken position on the trade-related aspects of Sustainable Development Goal 14. The ACP group¹⁷ has called for a multilateral, realistic and pragmatic agreement that prohibits fisheries subsidies granted to operators of fishing vessels targeting stocks in an overfished state and to vessels involved in IUU fishing, but leave some flexibility for developing States to subsidise the development of their own, fisheries sector, including the small-scale fisheries sectors.

The fight against piracy has been strengthened and remains a priority in certain ACP regions like the Gulf of Guinea and the East Africa and Indian Ocean. African States have engaged in

¹⁵ EU Commission DG Trade website www.ec.europa.eu/trade

¹⁶ https://ec.europa.eu/fisheries/sites/fisheries/files/docs/body/flag_state_notifications_en.pdf

¹⁷ WTO document TN/RL/GEN/182

international cooperation through a landmark agreement (the Yaoundé Code of Conduct). Still, respondent member countries continue to underline the lack of financial and technical means.

Regional solutions in order to meet increasingly strict international requirements which potentially limit trade (IUU and SPS requirements) should be investigated. An example would be the development of regional laboratories, which requires ACP states to cooperate on the designation of testing laboratories in neighbouring countries.

Strategic priority 3 - Supporting Food Security in ACP Countries

Products from capture fisheries and aquaculture will become increasingly important for nutrition and food security. The 2012 Plan of Action stated that it is therefore essential for States to plan for future food security, in terms of quantity, quality, continuity of supply, availability and price both for wild fisheries and aquaculture with a particular focus on artisanal fisheries and local business development.

Major progress has been made, to advance knowledge about small-scale fisheries and to reduce their perceived marginalisation. The FAO Voluntary Guidelines for Securing Sustainable Small-Scale Fisheries in the Context of Food Security and Poverty Eradication (SSF Guidelines), which were endorsed in 2014, represent a global consensus on principles and guidance for small-scale fisheries governance and development towards enhanced food security and nutrition. They aim to contribute to and improve the equitable development and improvement of the socio-economic conditions of small-scale fishing communities alongside sustainable and responsible management of fisheries.

The assessment of the State of Play of the Strategic Action Plan made in 2015 demonstrated that the collection and evaluation of data relating to the availability/supplies in terms of quality, prices on local markets was carried out only partially and in a manner that does not adequately support required planning. In addition, in 2015, efforts to develop local business were on-going to support the development of infrastructures for storage, transport and processing.

At global level, over 90% of people employed in capture fisheries are small scale¹⁸. Ocean and fisheries sustainability goals (such as SDG14) cannot be achieved without careful consideration of this important sector. target 14B Provide access for small scale artisanal fishers to marine resources and markets.

PFR 9: Planning for food security: Formulate food and nutrition security policies that take into account the future needs of populations and the distribution of the fisheries sector to the national economy

- West Africa: All the responding countries have tools in place at national level for planning food security. Almost all of them have national plans for food security which include fisheries resources and aquaculture.
- East Africa, Southern Africa, Indian Ocean: The majority of the responding countries have national plans for food safety in place, some very recently adopted (2017 in Madagascar and 2016 for Djibouti). The others are either reviewing (Kenya) or elaborating them (Mauritius).
- Central Africa: The majority of responding countries have a national planning for food security taking fisheries and aquaculture into account.
- Pacific: For Samoa, the involvement of fisheries community is in itself regarded as a policy for food security.
- Caribbean: All the responding countries have formulated food and nutrition security policies that are being implemented.

¹⁸ The State of World Fisheries and Aquaculture 2016, FAO

- The Food and nutrition security Impact, Resilience, Sustainability and Transformation (FIRST)¹⁹ programme provides policy assistance and capacity development support to 21 ACP countries through a network of policy officers based in national institutions. It has released a specific Policy Guidance Note on “Strengthening sector policies for better food security and nutrition results: Fisheries and Aquaculture” to support policy makers address the food security and nutrition situation in their country. At regional level, FIRST provides policy support to ECOWAS for the formulation of the Regional Fisheries and Aquaculture Policy incorporating food security and nutrition concerns and in the formulation of national fisheries and aquaculture programmes and investment plans. FIRST supports the establishment of a multi-stakeholder coordination platform of relevant actors in the fisheries and aquaculture sector in West Africa.

PFR 10: Small-scale fishing: Guarantee sustainable access rights for small scale fishermen to resources and markets and better organise the sector to rationalize the use of resources; Empower women in the post-harvest subsector of fisheries and aquaculture through improve technologies and loans for value-addition, with a view to generating employment and income

- In West Africa, responding countries have secured access rights for small scale fishermen in their legal framework. This includes the acknowledgment of customary law in the national framework and the creation of professional organisations with the financial and technical help of public funding. The organisations are in some cases in charge of co-management of fishing areas. As regard women empowerment in the post-harvest subsector, their role is supported through financing of equipment, training and/or loans in almost all of the responding countries. The establishment of national associations of fish processors and traders in some countries such as Ghana is another important milestone in women’s contribution are taken into account in policy decision-making.
- East Africa, Southern Africa, Indian Ocean: all responding countries have or will have secure access for small scale fishermen and the creation or strengthening of local organisations in order to sustainably manage resources. In Djibouti, a large-scale survey on artisanal fisheries was conducted in 2016 and should improve the planning and sustainability for the sector. Training, improved technology equipment and micro-credit are dedicated to women in the responding countries. In Botswana, a limited number of licence is issued in the zoning area of the Okavango delta area.

“African Women Fish Processors and Traders Network (AWFishNET)”²⁰ has been established in view of, in particular, facilitating collaboration and cooperation between fish processors and trader associations in Africa, sharing best practices and experiences and attracting increased public & private investment in fish post-harvest activities (fish processing and trading).

- Central Africa, responding countries have ensured access rights for artisanal fishermen either through a licence system or through areas excluding other type of fishery. The

¹⁹ The Food and nutrition security Impact, Resilience, Sustainability and Transformation (FIRST) is a partnership between the EU and the FAO for the period 2014-2020. It is active in 32 countries among these, 21 are ACP countries.

²⁰ established during a dedicated workshop organized by the African Union Interafrican Bureau for Animal Resources (AU-IBAR) in collaboration with the NEPAD Agency (NPCA), WorldFish and the Government of the United Republic of Tanzania April 2017

organisation of the profession is done via cooperatives or co-management committees like in Cameroon where they were created for the main inland water fishery.

- Pacific: in Samoa, the legal framework includes the access rights for small-scale fishermen which is mainly an open access activity. Women are highly involved in community fisheries management activities and aquaculture development. There are organisations offering assistance to establish small business ventures.
- Caribbean: In most of the responding countries, all the fisheries are small scale (e.g. Saint Vincent Grenadine, Dominica). The organisation of the sector is mainly done through cooperatives. At regional level, it is worth noting the CNFO which is a network of small scale fisherfolk organisations operating in the Caribbean Region. Its mission is to improve the quality of life of fisherfolk and develop a sustainable and profitable industry. It is engaged as a partner in regional capacity building projects aiming at strengthening fisherfolk to participate in governance projects (Strengthening Caribbean Fisherfolk to Participate in Governance -SCFPG- project). Women are mainly present in the post-harvest activities of processing and marketing. In Belize and in Saint Vincent and Grenadine, there are facilities offered to women for training and access to business investment.

PFR 11: Local business development: Develop a favourable business environment to attract national and international investment

- In West Africa, all the countries have reported enabling business environment for investments. This is reflected at national level through plans for public/private investments or tax incentives. In addition, several countries underline that the improvement of landing and process infrastructures ensure the attractiveness of the sector.
- Eastern Africa, Southern Africa, Indian Ocean: All the responding countries are encouraging investments through their national policy.
- Central Africa: All the responding countries are encouraging business development in particular via incentives measures offered to private investments; spreading of information on business creation in fisheries and aquaculture sector. In addition, new measures are now applicable in Cameroon where a certificate is required for goods (fishery products included) imported into the country in order to protect the local industry and consumers from bad-quality imported raw material²¹.
- Caribbean: Most of the responding countries have created an enabling environment for national and international investments. Tax incentives in particular are used. In Dominica, where Government has made available low interest financing to assist small scale fishers to upgrade their vessels to meet food safety standards, such as for ice box construction.

²¹ Pre shipment Evaluation Conformity Programme d'Evaluation de la Conformité Avant Embarquement (PECAE) started in August 2016 in Cameroon

Lessons learnt and challenges for the future

According to the responses received, there is a general trend among ACP countries on the increased consideration given to fish and aquaculture production in the definition of food security strategies.

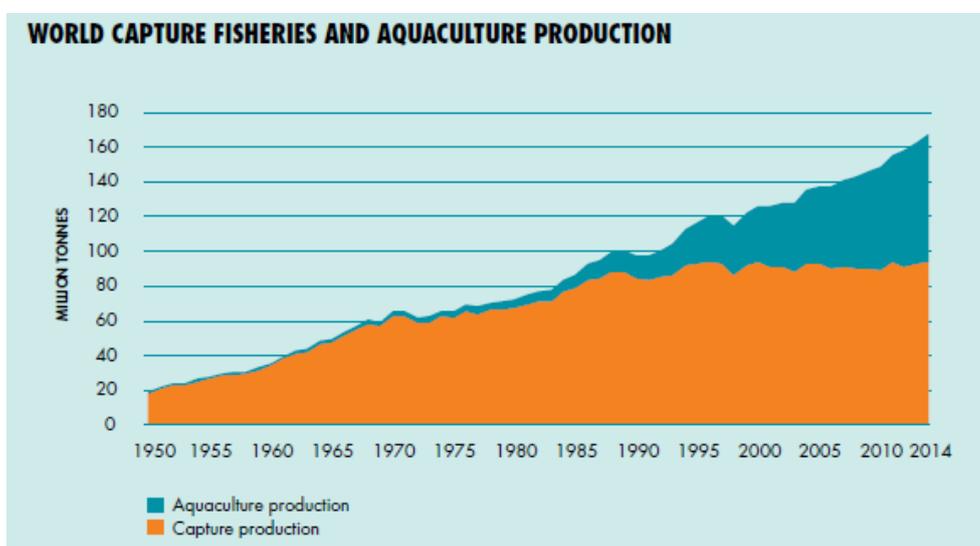
There is widespread acknowledgment of the strategic role of women in post-harvest activities. However further support through training and access to micro-financing should be encouraged in countries where there is room for improvement in order to increase value added production and employment.

Strategic priority 4 - Developing Aquaculture

According to the most recent estimates, aquaculture now provides half of all fish for human consumption²². Future growth of fish production is expected to come from aquaculture and not capture fisheries, with developing countries producing the majority of new output²³. In 2015, global aquaculture production reached 106 million tonnes, 76.6 million tonnes of aquatic animals and 29.4 million tonnes of aquatic plants, growing at an average annual rate of 6.6 percent since 1995.

The global increase of aquaculture production and the low share of this originating from ACP countries has been noted by the ACP Group. The 2012 Plan of Action identifies support for aquaculture production in several fields such as the development of comprehensive national frameworks supportive of aquaculture, along with strategic approaches to development; a systemic identification of areas with potential for aquaculture; providing the technical know-how and capacity to develop efficient aquaculture businesses, linking in the necessary feed requirements and quality brood stock to support production; addressing technical requirements for exports as well as promoting market access and targeted marketing tools.

The share of ACP countries production in global aquaculture production (1%) illustrates the slow progress of development in most ACP countries. From 2012 to 2015, significant progress had been made in several countries but with varying level of development. Several countries have made progress in the development of commercial aquaculture whereas others can capitalise on their success. The poor state of infrastructure for access to production zones was described as very poor in some countries. It was noticed that the development of market was relatively under-developed.



Source: The State of World Fisheries and Aquaculture 2016, FAO 2016

PFR 12: Planning for aquaculture: National Aquaculture development plans developed

- West Africa: There is a wide awareness of the potential of aquaculture development among responding countries. All the responding countries have national development plans which reflect this and one is about to adopt a specific aquaculture plan very soon.

²² The State of World Fisheries and Aquaculture 2016, FAO 2016

²³ OECD, 2013

For instance, Senegal has a planning for accelerated aquaculture development in its national development program covering 2018-2023.

In Ghana, the West Africa Regional Fisheries Program (WARFP/PRAO) has supported the training of 60 fisheries officers from Fisheries Commission in various aspects of Nile tilapia farming (on cage construction, tilapia production, growth monitoring in cages, feed management in cages, fish nutrient requirements, fish feed formulation and preparation, feeding of fingerlings, sorting of breeders in cages, water quality management and harvesting strategies)²⁴. Cage farming of tilapia is becoming widespread in Lake Volta. Fisheries Officers sensitization on the Aquaculture Code of Conduct has taken place in the Volta and Western Regions. The completed business models have been extensively introduced to stakeholders.

- East Africa, Southern Africa, Indian Ocean: Half of the responding countries have national strategies for aquaculture development. The other countries have either already measures in place (like the identification of potential aquaculture sites accompanied with deed of concession for investors) or are at very elementary stage for aquaculture. Uganda has a significant potential for development of commercial aquaculture. A project²⁵ is running to support a competitive, job-intensive, inclusive, environmentally-sustainable and climate-resilient aquaculture value chain in a comprehensive manner. Cage farming is growing rapidly in the region, brings risks of loss of biodiversity and unsustainable development. At regional East African Community (EAC) level, the EU is currently preparing a project to support the Lake Victoria Fisheries Organisation (LVFO) in the development of sustainable aquaculture. The Southern African Development Community has adopted a Regional Aquaculture Strategy and Action Plan for the period 2016-2026.
- Central Africa: Planning for aquaculture has been settled in the majority of the responding countries, the others are progressing on it.
- Pacific: Samoa has a national aquaculture management and development plan for 2013-2018. Main species farmed are giant clams (*Tridacna* spp.) and Trochus (*Tectus niloticus*), and Tilapia for freshwater. Tonga aquaculture Commodity and development plan is due to be reviewed during 2017
- Caribbean: Planning for aquaculture is not developed homogeneously in Caribbean region. Most of the responding countries have or are requesting technical support to complete development plan for aquaculture (Dominica, Saint Kitts and Nevis, the Bahamas). The Bahamas and Belize states that this sector is a major component for national development.

PFR 13: Infrastructure and technical support: Strengthen South-South synergies among countries and highlight sustainable successes; Build regional capacities in training and research

- West Africa: South South synergies have been developed through study trips among west African countries and also trips to North Africa (Egypt, Morocco for enhance

²⁴ Ghana - West Africa Regional Fisheries Program, World Bank (P124775)

²⁵ EU funded action under 11th EDF (UG/FED/038-334)

capacity training), as well as China). In addition, Senegal is also cooperating with Korea, Thailand, Brazil and Israel. Cooperation with neighbouring countries has been developed to acquire better performing seeds, breeders and fish feed. Research centres are receiving funds to increase their capacities in aquaculture domain in several countries.

- ATLAFCO is developing initiatives to support cooperation for the development of aquaculture. It aims at creating a framework to share knowledge and experience among its member countries. A workshop was organised to improve strategies and action plans already implemented in some countries²⁶.
- East Africa, Southern Africa, Indian Ocean: Some countries have cooperation that are on-going or about to be developed with Vietnam (Madagascar), with Indonesia, and with China (Kenya). Kenya and Tanzania have well established research and training centres. The development of fish cages in Lake Victoria have led the three partner States to develop cage farm guidelines at regional level under the coordination of LVFO.
- Central Africa: Some countries of this region are having regular exchange of experiences on aquaculture with Egypt and Brazil (for technology transfer on fish feed production). The training and research capacities are developing at regional level and in particular on fingerlings production and research on fish feed formulation.
- Pacific: Bilateral training has been organised between Samoa and China (Xiamen) covering various aquaculture topics. Samoa is fostering cooperation on aquaculture science and technology in international and regional fora (SPC, FAO, FFA, etc.). It is also conducting research projects on seagrass (a green algae: *Caulerpa lentillifer*), tilapia and giant clam farming.
- Caribbean: None of the responding countries reported meaningful south-south synergies experiences in the field of infrastructure and technical support for aquaculture. Some countries require technical support and assistance to develop it. Nevertheless, there are exchanges at regional level on aquaculture in CRFM and OSPECA.

PFR 14: Developing markets: Develop regional and international niche markets by promotion product quality (especially pollution free)

- West Africa Region: In the responding countries, aquaculture production is currently not developed towards international markets mainly because for most of them production is absorbed by national market and which is of paramount importance to support food security. In fact, some countries have established de facto bans on fish imports, as a means of stimulating national production.
- Eastern Africa, Southern Africa, Indian Ocean: two of the responding countries have developed regional or international markets by promoting product quality through labelling (Organic EU/ French label for one shrimp producer, French quality label for

26 See Atelier "l'Aquaculture en zone COMHAFAT : Un potentiel en quête de valorisation" 13 - 15 Avril 2017 M'diq, Maroc

another shrimp producer in Madagascar) or through implementing a national aquaculture residue monitoring plan (which enables Kenya's access to EU market) or aquaculture best practice manual. Kenya is currently developing fish feed standards. Operators are concerned about the impact of low cost imports of aquaculture products from China, which could potentially undermine local development.

- The "APDRA Pisciculture Paysanne » is an NGO which accompanies fish farmers and rice farmers in Guinea, Ivory Coast, Congo, Cameroon and Madagascar to help them create and develop their activities. It also provides support to stakeholders organisations.
- Central Africa: in most of the responding countries, aquaculture production goes to local consumption. At regional level, African Union and COREP are working on biosecurity of fish farms and quality improvement of aquaculture products.
- Pacific: Samoa is encouraging promotion of tilapia consumption at national level as well as encouraging research for value-added initiatives for the aquaculture products (the shell of trochus for instance, the meat having already a market).
- Caribbean: except for one, all responding countries have no possibility to develop markets at regional or international levels due to a very local production. In Belize, the sector is private-driven and it is worth noting that shrimps and tilapia have been certified by Aquaculture Stewardship Council (ASC) as sustainably farmed in 7 farms²⁷.

²⁷ See Aquaculture Stewardship Council certification program <http://www.asc-aqua.org/>

Lessons learnt and challenges for the future

Most of the responding countries have a national planning for aquaculture development. Some are still requesting technical support to complete this action.

Aquaculture is one of the actions where South-South cooperation is the remarkable. It should be strengthened.

As evidenced by the African experience, aquaculture can be a useful sector to develop to ensure food security and nutrition, in particular in the perspective of declining fisheries landing. In these contexts, export of aquaculture products is not seen as a priority.

The development of labels should be assessed so as to consider their contribution to value-added in aquaculture production.

Feed production is a potential new issue for ACP countries to reflect upon. According to FAO²⁸, appropriate aquafeed policy, regulatory frameworks, and feed standards need to be developed in those countries where they are lacking, and institutional capacity needs strengthening in agencies responsible for aquaculture management, monitoring and compliance.

Other issues that need to be addressed are strengthening training and the dissemination of information to farmers, particularly small-scale farmers with limited access to the latest technological and management developments. Whilst several countries have fisheries training institutions which include aquaculture, these are not strongly supported in line with development policy.

Rapid and uncontrolled development of intensive aquaculture in some regions (e.g. Lake Volta, Lake Victoria) carries risks of loss of biodiversity and disease, which can potentially undermine development. The Tilapia lake virus (TiLV) is already affecting some ACP producers. Development and implementation of biodiversity controls and implementation of aquatic animal health strategies should be developed urgently, in tandem with production.

²⁸ The State of World Fisheries and Aquaculture 2016, FAO 2016,

Strategic priority 5 - Maintaining the Environment

Fishing and aquaculture activities should be considered in the context of the wider environment in which they take place. The 2012 Plan of Action addresses several approaches (such as the ecosystem approaches to fisheries management²⁹, coastal zone management; environmental impact assessment and global climate change) in which the environmental considerations of fisheries and aquaculture must be taken account.

Globally, the state of coastal and marine environments is degraded due to inter alia; pollution, overfishing, and climate change. Few regional initiatives were highlighted during the 4th meeting designed to improve the health of marine and coastal ecosystems. The ecosystem based management approach to fisheries is only in its initial stages in ACP countries. Management of coastal areas is still challenged by the persistent problem of managing land-sea interactions. In 2015, management of coastal areas and of biodiversity in particular, was addressed by setting up marine protected areas, but terrestrial conditions (such as pollution) which impacts those protected areas was hardly taken into account. The lack of technical capacities has prevented full accounting for all factors which impact on the aquatic environment, limiting the effectiveness of common management tools.

In 2015, it was also considered that too few holistic environmental studies were conducted and the effects of global climate change on fisheries was only partially taken into account in national plans on climate change. It is now well understood that when it comes to climate change, oceans and coastal systems are particularly affected by ocean warming, coastal erosion and ocean acidification. The Paris Agreement³⁰ recognizes that climate change is a fundamental threat to global food security, sustainable development and poverty eradication. Thus, governance needs to ensure that fisheries and aquaculture adapt to the impacts of climate change and improve the resilience of food production systems.

PFR 15: Ecosystems approach to fisheries management: build capacities and implement pilot projects

- In West Africa, all the responding countries have initiated the implementation of the ecosystem approach to Fisheries. Almost all coastal countries have been/are beneficiaries of the Ecosystem Approach to Fisheries - EAF-Nansen Project³¹ “Strengthening the Knowledge Base for and Implementing an Ecosystem Approach to Marine Fisheries in Developing Countries”, an initiative to support the implementation of the ecosystem approach in the management of marine fisheries. They subsequently drafted their national management frameworks (see Strategic Priority 1) taking into account the ecosystem approach to fisheries management. In landlocked countries, EAF is implemented for inland fisheries, along with supporting project for capacity building. Unfortunately, some countries report that they even lack of resources to implement pilot projects.

²⁹ The Ecosystem Approach to Fisheries (EAF) has been adopted by the FAO Committee on Fisheries (COFI) as the appropriate and practical way to fully implement the Code of Conduct for Responsible Fisheries. EAF is a risk based management planning process that covers the principles of Sustainable Development including the human and social elements of sustainability, not just the ecological and environmental components.

³⁰ the Paris Agreement on Climate Change adopted on 12 December 2015, entered into force on 4 November 2016

³¹ (GCP/INT/003/NOR) The project is executed by FAO in close collaboration with the Institute of Marine Research (IMR) of Bergen, Norway and funded by the Norwegian Agency for Development Cooperation (Norad).

- East Africa, Southern Africa, Indian Ocean: In Mauritius, the 'Banks Fisheries Management plans' has been prepared following EAF and is being implemented. However, some responding countries claim not to have the qualified human resources to implement EAF.

The Ecofish project is a joint research effort to modernise and improve management of key marine fisheries in Angola, Namibia and South Africa through implementation of EAF in the Benguela Current Large Marine Ecosystem.

- Central Africa countries have benefited from the EAF-Nansen project. Cameroon and Congo have management plans in place for shrimps, in which the ecosystem approach is applied.
- Pacific: In Samoa, The Community-Based Fisheries Management Programme (CBFMP) which empowers local community to take responsibility in management decisions is incorporating the ecosystem approach to managing fisheries. Tonga developed a project starting in 2015 as part of the Fanga'uta Lagoon Management plan for the protection of coastal zone.
- Caribbean: Nearly all the ACP countries in the region are benefiting from a project³² to improve the management of the shared living marine resources through an Ecosystem-Based Management approach applied to Large Marine Ecosystems (LMEs), such as the Caribbean Large Marine Ecosystem for the period 2015-2025. In Belize, after completion of a pilot project, legislation has been recently passed to establish nine fishing zones with managed access.

PFR 16: Coastal zone management: Develop the management of coastal areas using a catchment area as a frame of reference

- West Africa: Several projects have addressed of coastal areas management. Coastal zone management is a required component of the implementation of the West Africa Regional Fisheries Program (WARFP/PRAO) where investment in infrastructure is considered. The Monitoring for Environment and Security in Africa (MESA)³³ programme is currently delivering products and operational services to African users in areas such as coastal and marine resources management. Some countries have a policy on Integrated Coastal Management (ICM), for example the recent law adopted by Ivory Coast in June 2017.
- East Africa, Southern Africa, Indian Ocean: The strengthening of conservations areas in Mozambique through the MozBio project has contributed to protect habitat diversity and thus has helped improving the quality of life of communities depending on these areas³⁴. Mauritius has designated marine protected areas (marine parks) with proper management plans. Voluntary Marine Conservation Areas are also being developed

³² The CLME+ Project is a 5-year project (2015-2020) implemented by the United Nations Development Programme (UNDP) and co-financed by the Global Environment Facility (GEF).

³³ The Monitoring for Environment and Security in Africa (MESA) programme is a European Union funded project under the 10th EDF. It is being implemented by the African Union Commission and steered by the Regional Economic Communities (CEMAC, ECOWAS, IGAD, IOC and SADC) and the ACP Secretariat in close cooperation with the European Union

³⁴ "Oceans, Fisheries and Coastal Economics", World Bank, June 5, 2017

and implemented by NGOs. In Madagascar, all coastal zone actors are members of a single public entity, the Regional Committee for Integrated Coastal Management.

- Central Africa: Protection of mangroves ecosystems is a matter of concern for several states in this region. Projects in Congo and Cameroon³⁵ are currently focusing on integrated management of these coastal areas. Congo has delivered an orientation framework up to 2025 in order to ensure integrated and sustainable management for mangroves ecosystems.
- Pacific: In Samoa, projects are led jointly by services in charge of environment preservation and fisheries respectively to ensure that all aspects of coastal areas are taken into consideration.
- Caribbean: Saint Vincent and the Grenadine has established its first Maritime Park and aim to establish a second one in 2018. Belize is implementing an Integrated Coastal Zone Management plan (ICZM) Plan (endorsed in 2016) which provides a framework to manage the coastal zone and promote good practices for coastal developments by balancing conservation practices with economic and social needs. In Belize 21 % of maritime area is under protection (of several degrees of protection) including 3% of no take zones.

PFR 17: Environmental impact assessment: Develop holistic approaches to assess ecosystems services provided by coastal and marine ecosystems

- In West Africa, some responding countries apply mandatory environmental and social impact assessment before allowing new development in coastal areas. In inland waters as well, the environmental impact assessment is required (e.g. in Niger) for continental aquatic ecosystems.
- East Africa, Southern Africa, Indian Ocean: Environmental impact assessment (EIA) are required for aquaculture projects in several countries, including Mauritius, Tanzania and Kenya. Madagascar requires EIA for any project in coastal areas.
- Central Africa: Cameroon requires impact assessment before any authorisation is given to any new aquaculture/mariculture project. However, in Gabon, only oil prospection projects are required to be subject to impact assessment.
- Pacific: Samoa has put in place measures to minimize the impact of land-based activities on resources of coastal ecosystem and habitats. It ensures a continuous monitoring and assessment of these areas.

Caribbean: Environmental impact assessment is required for all marine projects in Saint Kitts and Nevis. Saint Vincent is training staff to undertake EIAs. Belize has an EIA system in place applicable to all coastal development projects. However, several responding countries report only slow progress on this topic, and indicate that further training and technical assistance is required.

³⁵ GCP/PRC/007/GEF Projet de Gestion intégrée des mangroves et des zones humides associées, et des écosystèmes forestiers côtiers de la République du Congo GCP/CMR/030/GFF PSBC – Gestion communautaire durable et conservation des écosystèmes de mangroves au Cameroun

PFR18: Global environmental change: Create a frame of reference to ensure that climate change is taken into account as well as other factors such as alien and invasive species

- West Africa: Some countries have adopted national plans to manage impacts of climate change. Niger is in charge of the leadership of the Climate Sahel Group for the COP 22. Senegal has formulated a national plan for the adaptation of fisheries sector to climate change (adopted in 2017). The funding for its implementation is in progress.
- East Africa, Southern Africa, Indian Ocean: Kenya has adopted a national climate change strategy and action plan including a component on fisheries. Data from the long-term monitoring of coastal ecosystem and coastal waters quality are collected in Mauritius as indicators for climate change. In relation to the UN Convention on climate change, Madagascar delivered a national communication on vulnerability and adaptation to climate change.
- Central Africa: A project is being conducted in Congo on exotic and invasive species. In Cameroon, actions are directed on invasive species and the effect of climate change on production systems.
- Pacific: Samoa has made progress in improving the awareness of fishing communities on the impact of climate change on fisheries. Samoa is ensuring continuous monitoring of marine environment. The National Disaster Management Plan covers the potential impacts of various scenarios on the fisheries and aquaculture sectors.
- Caribbean. Responses to the survey indicate a wide range of actions to ensure that national climate change strategies are taking into account fisheries. Some countries report only slow progress on this topic and indicate that technical assistance will be required.

The project CC4FISH (Climate Change Adaption in the Eastern Caribbean Fisheries Sector)³⁶ aims to increase resilience and reduce vulnerability to climate change impacts through introduction of adaptation measures in fisheries management and capacity building of fisherfolk and aquaculture producers.

³⁶ Implemented by Food and Agriculture Organisation of the United Nations (FAO) and financed by Global Environment Facility (GEF)

Lessons learnt and challenges for the future

Despite numerous projects seeking to apply the ecosystem approach in fisheries management in the responding countries, this is still work in progress, and there are still outstanding needs for capacity building in several countries.

The majority of the responding countries state that they are working on this action. Management of coastal zone has been very often implemented through designation of marine protected areas, although capacity limitations have reduced their effectiveness. Some countries have national Integrated coastal management strategy in place.

In most responding countries, an Environmental Impact Assessment (EIA) is required before the development of any activity in the coastal area. Some countries specifically request an EIA before authorising aquaculture/mariculture projects. Some countries point out the lack of qualified human resources to implement this action.

There is no uniform progress among responding countries on how fisheries and aquaculture issues should be taken into consideration in national strategies/plans of actions to adapt to climate change.

The ACP-EU Joint Parliamentary Assembly has reaffirmed its total commitment to full implementation of the Paris Agreement on climate change and calls on the global community to maintain the momentum for ambitious action.

Cooperation and networking on climate change issues, particularly at the intra- and inter-regional scales should be accentuated. In particular, research efforts should be supported to model fish population dynamics linked to climate/oceanic variables since any adaptation measures should be based on scientific evidence.

APPENDIX 1: Strategic Plan of Action for Fisheries and Aquaculture

See attachment “Appendix 1 Fisheries Strategic Plan 2012 Final (en)”

APPENDIX 2: Roadmap

See attachment “Appendix 2 Roadmap 2015”

APPENDIX 3: Questionnaire submitted to ACP States to assess state of play of the implementation of the roadmap.

List of responding countries:

<p>Bahamas</p> <p>Belize</p> <p>Benin</p> <p>Botswana</p> <p>Burkina Faso</p> <p>Cameroon</p> <p>Congo Brazzaville</p> <p>Côte d'Ivoire</p> <p>Djibouti</p> <p>Dominica</p> <p>Gabon</p> <p>Ghana</p> <p>Kenya</p> <p>Madagascar</p> <p>Mauritius</p> <p>Niger</p> <p>Saint Kitts and Nevis</p> <p>Saint Vincent and the Grenadine</p> <p>Samoa</p> <p>Senegal</p> <p>Togo</p> <p>Tonga</p>
