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REPORT SUMMARY

EU

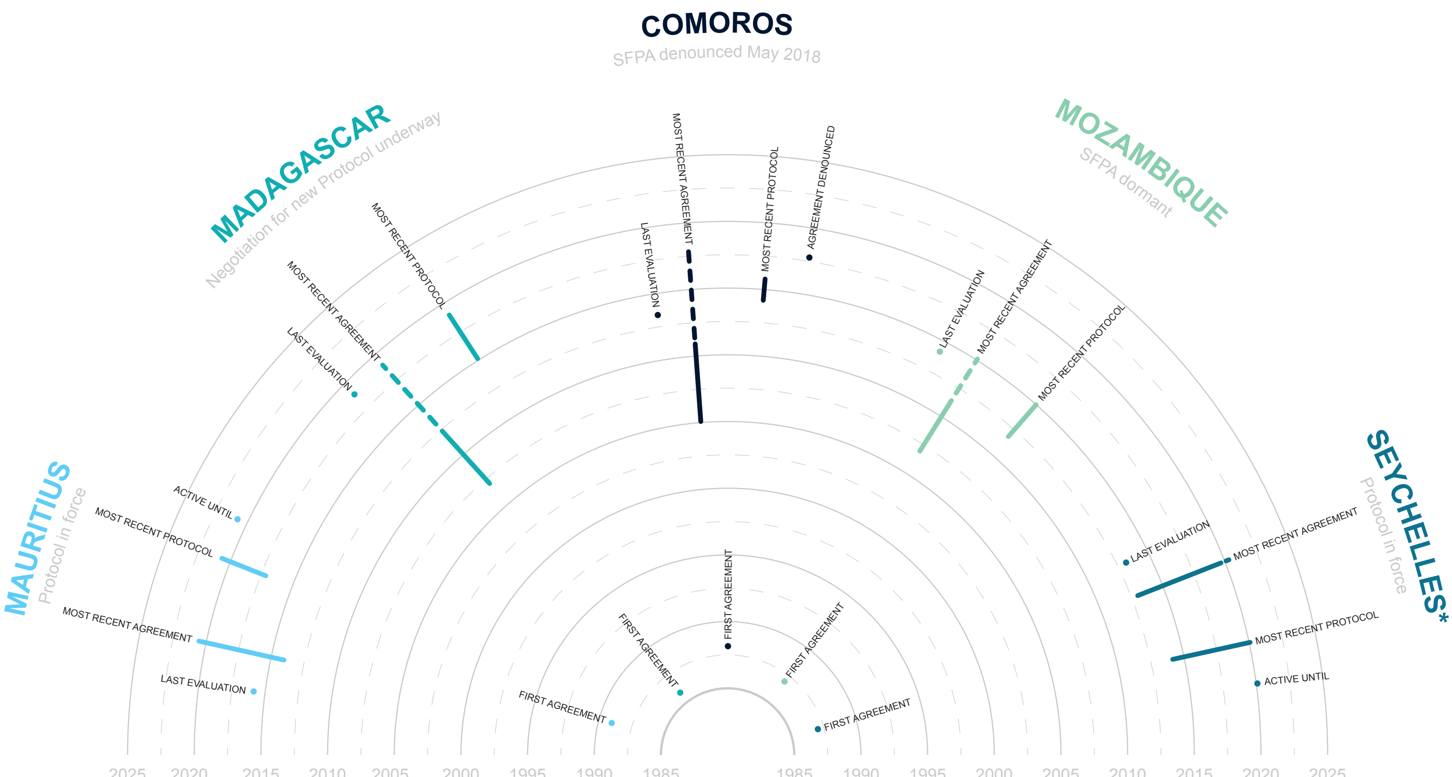
NOVEMBER 2019

THE STATUS AND FUTURE OF FISHERIES PARTNERSHIP AGREEMENTS IN THE SOUTH WEST INDIAN OCEAN

The Indian Ocean's tropical climate supports abundant near-shore fisheries that are mainly accessed by local fishers to meet national seafood demand, while its nutrient rich offshore waters are home to around 19% of the world's total tuna production. After the Western and Central Pacific Ocean, the Indian Ocean is the second largest region in the world for tuna fishing. Around 400 to 500 industrial fishing vessels originating from Asia and Europe track and catch tuna both inside the exclusive economic zones (EEZs) of the coastal States and in the high seas beyond any single State's jurisdiction.

Since the late 1980s, the European Union (EU) has entered into bilateral fishing agreements with countries in the South West Indian Ocean (SWIO). These bilateral agreements, negotiated and concluded by the European Commission on behalf of all EU Members States, have evolved to become Sustainable Fisheries Partnership Agreements (SFPAs). SFPAs sit within the framework of the external dimension of the EU's Common Fisheries Policy (CFP) and enable EU vessels to fish surplus stocks in the partner country's EEZ within an agreed framework of cooperation.

EU FISHING VESSEL ACCESS TO SWIO COASTAL STATE EEZs THROUGH SFPAs



KENYA

SFPA: NONE

LAST EX-ANTE EVALUATION: FEBRUARY 2014

STATUS: NO SFPA, NO NEGOTIATION

TANZANIA

SFPA: NONE

LAST EX-ANTE EVALUATION: FEBRUARY 2014

STATUS: NO SFPA, NO NEGOTIATION

SOMALIA

SFPA: NONE

LAST EX-ANTE EVALUATION: NOT DONE

STATUS: NO SFPA, NO NEGOTIATION

*The main study behind the data presented in this report was completed in June 2019; a new negotiation for the Seychelles has occurred since then, concluded in October 2019.

For SFPAs to continue to create mutual benefits for the coastal States and the EU within the changing dynamics of global fisheries, there are some challenges to overcome. These include an improved system for reporting what has been caught, better information transparency, and stronger links to the Indian Ocean Tuna Commission (IOTC) conservation and management measures.

SFPAs, when transparent and well-managed, can benefit both the EU and the coastal State. To secure the future of fair and equitable SFPAs in the SWIO, the recommendations presented in this summary must be taken on board in future SFPA negotiations.

SFPAs IN THE SWIO

MAURITIUS

Dec 2017 – Dec 2021

Vessels covered
40 Purse Seine | 45 Longline

EU contribution for annual access
€220,000

EU contribution for annual sector support
Fisheries policy: €220,000

Maritime policy & ocean economy: €135,000

Vessel owner annual advance
Purse Seine: €8,500
Longline > 100 GT: €4,125
Longline < 100 GT: €2,050

Reference tonnage
4,000

Vessel reference tonnage
Purse Seine
2017-2019: 130.8 | 2020-2021: 121.4

Longline > 100 GT
2017-2019: 63.5 | 2020-2021: 58.9

Longline < 100 GT
2017-2019: 31.5 | 2020-2021: 29.3

MADAGASCAR

Jan 2015 – Dec 2018

Vessels covered
40 Purse Seine
32 Longline > 100 GT
22 Longline < 100 GT

EU contribution for annual access
2015-2016: €866,250
2017-2018: €787,500

EU contribution for annual sector support
Fishery resources and fisheries policy: €700,000

Vessel owner annual advance
Purse Seine
2015-2016: €11,400
2017-2018: €13,300

Longline > 100 GT
2015-2016: €3,600
2017-2018: €4,200

Longline < 100 GT
2015-2016: €2,400
2017-2018: €2,800

Reference tonnage
15,750

Vessel reference tonnage
Purse Seine: 190
Longline > 100 GT: 60
Longline < 100 GT: 40

COMOROS

Jan 2014 – Dec 2016

Vessels covered
42 Purse Seine | 20 Longline

EU contribution for annual access
€300,000

EU contribution for annual sector support
Fisheries policy: €300,000

Vessel owner annual advance
Purse Seine: €4,235
Longline: €2,475

Reference tonnage
6,000

Vessel reference tonnage
Purse Seine: 77
Longline: 45

MOZAMBIQUE

Jan 2012 – Jan 2015

Vessels covered
43 Purse Seine | 32 Longline

EU contribution for annual access
€520,000

EU contribution for annual sector support
Fisheries and maritime policy: €460,000

Vessel owner annual advance
Purse Seine: €5 100
Longline > 250 GT: €4,100
Longline < 250 GT: €2,500

Reference tonnage
8,000

Vessel reference tonnage
Purse Seine: 146
Longline > 250 GT: 118
Longline < 250 GT: 72

SEYCHELLES*

Jan 2014 – Jan 2020

Vessels covered
40 Purse Seine | 6 Longline

EU contribution for annual access
2014-2015: €2,750,000

2016-2019: €2,500,000

EU contribution for annual sector support
Fisheries and maritime policy:
2014-2015: €2,600,000
2016-2019: €2,500,000

Vessel owner annual advance
Purse Seine
2014: €38,500 2015: €42,000
2016: €45,500 2017 & 2018: €49,000
2019: €52,500

Longline > 250 GT
2014: €6,600 2015: €7,200
2016: €7,800 2017 & 2018: €8,400
2019: €9,000

Longline < 250 GT
2014: €4,950 2015: €5,400
2016: €5,850 2017 & 2018: €6,300
2019: €6,750

Reference tonnage
50,000

Vessel reference tonnage
Purse Seine: 700

Longline > 250 GT: 120

Longline < 250 GT: 90

PRICE PER TONNE (€) OF SEAFOOD AND THE DIVISION BETWEEN THE EU AND THE VESSEL OWNER

The price per tonne is included in the Protocol and the division of this between the EU and the vessel owner is shown in the table below. The blue figures indicate when the vessel owners pay the same or more than the EU per tonne, which has been more common in Protocols coming into force since 2015. The table also shows the total price per tonne anticipated to be paid to the third country, ranging between €100 and €125. However, while the EU payment is fixed in relation to an agreed annual reference tonnage, the vessel owners' payment will depend on the uptake of licences. This issue is further confounded because the number of vessels in the Protocols is far above the actual number of EU vessels fishing in the SWIO. For example, all the Protocols allow for 40 or more purse seiners, when in reality there are under 30 purse seiners flagged to EU Member States fishing in the SWIO. This results in meaningless estimates and reduced income to the coastal States.

Although the framework of the SFPAs, if negotiated consistently across the region, may offer opportunities for coherency and improved transparency in the terms and conditions of access agreements, this has, overall, not been achieved. The negotiations and the figures agreed in Protocols have generally been more generous to the key players for the EU in the SWIO and not aimed to bring all States on a level playing field. This is demonstrated in the price per tonne negotiated in the Protocols, shown in the table below. Although, theoretically, the difference between EEZs may be due to expected species composition or other reasons, with no supporting information on how the calculations were made being shared between the EU and the coastal State or publicly available, it is not evident why these rates vary.

	MAURITIUS			MADAGASCAR			COMOROS			MOZAMBIQUE			SEYCHELLES		
Year	EU	Vessel Owners	Total	EU	Vessel Owners	Total	EU	Vessel Owners	Total	EU	Vessel Owners	Total	EU	Vessel Owners	Total
2012										65	35	100			
2013										65	35	100			
2014	65	35	120				50	55	105	65	35	100	55	55	110
2015	65	35	120	55	60	115	50	55	105				55	60	115
2016	65	35	120	55	60	115	50	55	105				50	65	115
2017				50	70	120							50	70	120
2018	55	65	120	50	70	120							50	70	120
2019	55	65	120										50	75	125
2020	55	70	125												
2021	55	70	125												

● The EU pays more than the vessel owner ● The vessel owner pays the same as or more than the EU

COMPARISON OF SFPA ACCESS CONDITIONS

An SFPA is comprised of various parts, namely the Agreement, the Protocol and the Annexes to the Protocol. A comparison of the most recent Protocols is given in the map. It details the Protocol's duration, the maximum number of fishing vessels permitted to fish under the Protocol, the EU's annual contributions, the reference tonnage, the vessel reference tonnage and the price per tonne for tuna.

While the frameworks and elements included are similar, it is evident that the Seychelles Protocol is by far the most significant in terms of reference tonnage, at 50,000 tonnes per year. Madagascar is the second most noteworthy SFPA with 15,750 tonnes (although this Agreement is not currently active), while Mauritius holds the smallest Protocol at 4,000 tonnes per year.

TUNA FISHING VESSELS

Within the SWIO, only SFPAs for tuna are in place with the EU; there are no multi-species Agreements. Currently, with two Protocols in force (in the EEZs of the Seychelles and Mauritius), the SFPA mechanism secures access to around one third of the tuna caught by EU vessels in the SWIO. Tuna is generally caught by purse seine or longline vessels in the SWIO, although some pole and line vessels also operate in the region.

There are around 50 purse seine vessels operating in the SWIO, with around 27 of these flagged to EU Member States. Skipjack and yellowfin tuna are the main species caught by EU purse seine vessels (making up around 90% of total catch), together with some bigeye and albacore tuna. Purse seine vessels mainly operate from and unload their catch to Port Victoria in the Seychelles.

There are an estimated 400 industrial freezer longline vessels operating in the SWIO, predominantly flagged to Taiwan, Seychelles and China, with around 50 longline vessels flagged to the EU. They target bigeye tuna, yellowfin tuna, swordfish and sharks. The main operational port is Port Louis, Mauritius.

The provision of fish to EU markets and consumers is viewed as an important element of the overall value for money of the SFPAs. In 2017, approximately 91% of processed tuna exports from Mauritius, 99% from Seychelles and 98% from Madagascar were sent to the EU. This directly benefits the EU in terms of nutrition and economy, and also provides employment and other benefits to the countries where the factories are located, as well as to the factory owners.

RECOMMENDATIONS FOR HOW TO IMPROVE SFPAs IN THE SWIO INCLUDE:

- Improve the system for EU fishing vessels to report their catches to coastal States under SFPAs, enabling coastal States to monitor fishing activities more effectively, evaluate catches and manage their fisheries;
- Increase transparency in the negotiation of SFPAs, by involving civil society and relevant regional organisations such as the IOTC;
- Increase transparency on all access agreements made by coastal States, both public and private;
- Ensure figures used in SFPAs are relevant and credible by ensuring that the number of vessels covered is realistic, the amount available to catch is consistent with IOTC conservation and management measures and scientific evidence, and the price per tonne is based on reasonably expected first sale values;
- Develop mechanisms, where possible, to enable fishing within disputed areas without jeopardising the resolution of the dispute, or any other adverse effects;
- Increase the focus of SFPA sector support to coastal States for implementing their national development policies and strategies, including for catching and processing, with an aim to improve social and economic benefits from the fishery while ensuring sustainable development and exploitation;
- Increase recognition of regional and sub-regional processes and instruments, such as agreed minimum terms and conditions for fisheries access, towards maintaining long-term access for EU fishing vessels and improving the sustainable management of fish stocks; and
- Negotiate with countries in the SWIO region that do not have an SFPA or have a dormant SFPA, with the aim to secure wider access for EU fishing vessels to available resources and to improve income for the coastal States.

Photo: © Brent Stirton / Getty Images

THE STATUS AND FUTURE OF FISHERIES PARTNERSHIP AGREEMENTS IN THE SOUTH WEST INDIAN OCEAN

100% RECYCLED

30 years

The first bilateral fisheries agreement between the EU and a country in the SWIO was with Madagascar in 1986

1/5

The Indian Ocean's offshore waters are home to 19% of the world's total tuna production

400-500

Up to 500 industrial fishing vessels originating from Asia and Europe track and catch tuna in the South West Indian Ocean

57%

Fishing vessels flagged to an EU country are responsible for more than half of the total tuna catch taken by purse seine vessels in the Indian Ocean

Prepared for WWF
by Stop Illegal Fishing (SIF)

stop illegal fishing

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For any further information and access to the full report, please visit http://wwf.eu/what_we_do/oceans/ or contact Antonia Leroy: aleroy@wwf.eu

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