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Evaluation and analysis of the Sustainable Fisheries Partnership Agreements (SFPAs) between the EU and third countries including an in-depth analysis of the sectoral support component of the SFPAs

Final report

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Evaluation and analysis of the Sustainable Fisheries Partnership Agreements (SFPAs) between the EU and third countries including an in-depth analysis of the sectoral support component of the SFPAs

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ABSTRACT

- 1. Sustainable Fisheries Partnership Agreements (SFPAs) are international agreements concluded with partner third countries for the purpose of obtaining access to their waters and resources** in order to sustainably exploit a share of the surplus in exchange for financial compensation from the EU, which includes sectoral support. There are two main types of SFPAs allowing access of EU vessels to the waters of partner third countries: SFPAs providing access to exploit a wide range of fish stocks (the so-called 'multispecies' SFPAs), and SFPAs providing access to exploit highly migratory species (the so-called 'tuna' SFPAs).
- 2. In December 2020, there were thirteen SFPAs with implementing Protocols in force**, including four multispecies SFPAs (Greenland, Mauritania, Morocco and Guinea Bissau) and nine tuna SFPAs (Cabo Verde, Cook Islands, Côte d'Ivoire, The Gambia, Liberia, Mauritius, Sao Tome, Senegal and Seychelles), with in the case of The Gambia and Senegal, limited additional fishing opportunities to exploit demersal species. In addition, there were seven SFPAs without implementing Protocols in force - the so-called dormant SFPAs (Equatorial Guinea, Gabon until 2021¹, Kiribati, Federated States of Micronesia, Madagascar, Mozambique and Solomon Islands).
- 3. EU commitments to partner third countries between 2015 and 2020 represented an annual average of EUR 159 million in total, including EUR 126 million paid from the EU public budget** (EUR 98 million as contribution for access and EUR 28 million as contribution for sectoral support) and **EUR 33 million paid by the owners of the EU fishing vessels** benefiting from the fishing opportunities available. About 90% of the EU contribution related to the multispecies SFPAs concluded with Guinea-Bissau, Greenland, Mauritania and Morocco.
- 4. Between 2015 and 2020, an annual average of 211 EU fishing vessels flying the flag of thirteen EU Member States** utilised the fishing opportunities available to catch close to 300 000 tonnes of fisheries products, of which 49% were small pelagic species and 39% highly migratory species. The activities of the EU fleet operating under the framework of SFPAs directly supported employment of an annual average of 3 650 EU nationals and 2 650 nationals of third countries, with an additional annual average of 15 000 jobs supported in the third countries in the fish processing sector, of which 9 000 are women. The partner third countries that could offer enabling conditions for interactions between the EU fleet and their fishing sector derived additional economic and social benefits from the activities of EU vessels operating under the framework of SFPAs.
- 5. The approach followed in multispecies SFPAs to adapt EU fishing opportunities** from one Protocol to the next or during their implementation, **was effective in adapting EU fishing pressure on certain key stocks in West Africa** which were assessed as overexploited (small pelagic species, cephalopods). The approach produced positive results for some stocks now being exploited within sustainability limits, but was not always effective in ensuring the conservation of those stocks where the management framework implemented by the partner third countries was not adequate to prevent increased fishing pressure by national or other foreign fleets. **In the case of tuna SFPAs**, SFPAs were effective in ensuring that conservation and management measures adopted in the multilateral framework of Regional Fisheries Management Organisations (RFMOs) were also applied in the waters of the partner third countries.
- 6. The EU contribution for sectoral support resulted in approximately EUR 200 million being channelled between 2015 and 2020 through the budgets of the partner third countries to contribute to the achievements of**

¹ The SFPAs with Gabon became active in 2021 following the entry into force of a new Protocol on 29 June 2021 for a period of five years

Sustainable Development Goal 14 of the United Nations, and particularly to the achievements of its targets 14.b (access to markets) 14.4 (regulate harvesting and end overfishing and IUU fishing) and 14.a (increase scientific knowledge). The evaluation confirmed that EU interventions within the framework of SFPAs were coherent with other EU interventions affecting the fisheries sector of the partner third countries through development programmes implemented at national or regional levels, with **numerous examples of synergies and complementarities between the different EU interventions.**

7. **The activities implemented under the sectoral support component of SFPAs contributed to the strengthening of the capacities of the partner third countries to fight IUU fishing, and for conducting scientific research.** SFPAs contributed to scaling up of the capacities of the partner third countries in the field of monitoring, control and surveillance through *inter alia*: i) modernisation of the Fisheries Monitoring Centres of the partner third countries through procurement of hardware and software to monitor the position of fishing vessels by satellite (Vessel Monitoring System) and to receive electronic declarations of catch (Electronic Reporting System), ii) strengthening of the legal framework, and iii) equipment and support for conducting surveillance patrols. **Concerning scientific research**, SFPAs supported the implementation of research surveys at sea and data collection schemes with the results of research activities directly utilised by partner third countries in the design fisheries management plans. The sectoral support programme also strengthened the capacities of the partner third countries to maintain or obtain agreement by the EU sanitary authorities to export fisheries and aquaculture products to the EU, and to implement and manage marine protected areas.
8. **Other activities implemented under the sectoral support component of SFPAs supported public interventions directly benefiting the operators of the fishing sector in the partner third countries, particularly the artisanal fishing sector.** Depending on the context and budget available, the EU contribution for sectoral support was utilised for the development of infrastructure (landing sites, processing sites, social infrastructure), the modernisation of existing landing sites and improved conditions for post-harvest handling and processing of landings, safety at sea (capacities for research and rescue, safety equipment for artisanal fishers), vocational training to attract and to enhance the professional skills of workers in the fisheries sector, and implementation of national schemes to incentivise modernisation or adaptation of artisanal fleets.
9. **The overall conclusion of the evaluation is that SFPAs are fit for purpose** in their contribution to the objectives of i) contributing towards resource conservation and environmental sustainability through rational and sustainable exploitation of living marine resources of the waters of the partner third countries, ii) contributing to the continued activities of the EU fishing fleets operating in external waters and the employment linked to these fleets, and iii) supporting the development of a sustainable fisheries sector in the partner third countries. **However, the evaluation identified certain areas for improvement of the performance of the instrument, particularly related to implementation.**

EXECUTIVE SUMMARY

CONTEXT OF THE EVALUATION

- 1. Sustainable Fisheries Partnership Agreements (SFPAs) are international agreements concluded with partner third countries for the purpose of obtaining access to their waters and resources** in order to sustainably exploit a share of the surplus in exchange for financial compensation from the EU, which includes sectoral support. There are two main types of SFPAs allowing access of EU vessels to the waters of partner third countries: SFPAs providing access to exploit to a wide range of fish stocks (the so-called 'multispecies' SFPAs) and SFPAs providing access to exploit highly migratory species (the so-called 'tuna' SFPAs).
- 2. The evaluation of EU interventions in the framework of SFPAs was conducted in accordance with the Better Regulation Guidelines published by the EU.** The evaluation methodology included data collection and desk research of available documents and databases, targeted consultations of stakeholders in the EU and in the partner third countries, as well as a public consultation. The latter was launched through the European Commission consultation website² between March and June 2021. The evaluation concentrated on the period 2015-2020, but considered earlier periods of time where relevant to the evaluation.
- 3. The general objective of SFPAs is to ensure that fishing activities in the waters of partner third countries are deployed in accordance with the international obligations of the EU as well as with the objectives and principles of the EU Common Fisheries Policy.** The specific objectives of SFPAs are i) to contribute towards resource conservation and sustainable exploitation of marine resources in the waters of the partner third countries, ii) to contribute to the protection of the EU distant-water fleet and the employment linked to this fleet, and iii) to support the development of a sustainable fisheries sector in the partner third countries.
- 4. SFPAs include two components: the access component** defining the technical and financial conditions governing access by EU fishing vessels to the waters of the partner third countries, **and the sectoral support component** defining the scope and the principles governing the utilisation of the EU support to the implementation of the sectoral fisheries policy of the partner third country. The EU contributions for access and for sectoral support are decoupled, meaning they are subject to distinct disbursement rules.
- 5. Four key principles enacted through specific clauses in all SFPAs underpin the governance framework of SFPAs: human rights and respect for democratic principles** as essential elements of SFPAs, **non-discrimination** prohibiting the granting of more favourable conditions to other fleets than those granted to EU operators, **transparency** to ensure availability of relevant information on agreements granting access to other fleets, and **exclusivity** prohibiting access to the waters of the partner third countries for EU vessels unless they are in possession of a fishing authorisation which has been issued in accordance with the SFPAs.
- 6. In December 2020, there were thirteen SFPAs with implementing Protocols in force**, including four multispecies SFPAs (Greenland, Mauritania, Morocco and Guinea Bissau) and nine tuna SFPAs (Cabo Verde, Cook Islands, Côte d'Ivoire, The Gambia, Liberia, Mauritius, São Tomé-et-Príncipe, Senegal and Seychelles). In the case of The Gambia and Senegal, limited additional fishing opportunities are provided to exploit

² <https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/12728-Fisheries-evaluation-of-the-EU%E2%80%99s-sustainable-fisheries-partnership-agreements-SFPAs- en>

demersal species. In addition, there were seven SFPAs without implementing Protocols in force - the so-called 'dormant' SFPAs (Equatorial Guinea, Gabon until 2021³, Kiribati, Federated States of Micronesia, Madagascar, Mozambique and Solomon Islands). The following table shows the EU public contributions committed under the thirteen SFPAs with an implementing Protocol in force in December 2020.

The thirteen SFPAs with an active implementing Protocol in December 2020

Partner third country	Date SFA	Protocol date start	Protocol date end	EU annual* contribution for access (EUR)	EU annual* contribution for sectoral support (EUR)	Total EU Annual* contribution (EUR)
Greenland	01/01/2013	01/01/2016	31/12/2020	13 168 978	2 931 000	16 099 978
Morocco	18/07/2019	18/07/2019	17/07/2023	19 100 000	17 900 000	37 000 000
Cabo Verde	20/03/2007	20/05/2019	19/05/2024	400 000	350 000	750 000
Mauritania	30/11/2006	16/11/2015	15/11/2021	57 500 000**	4 125 000	61 625 000
Senegal	20/11/2014	18/11/2019	17/11/2024	800 000	900 000	1 700 000
The Gambia	31/07/2019	31/07/2019	30/07/2025	275 000	275 000	550 000
Guinea Bissau	16/06/2007	15/06/2019	14/06/2024	11 600 000	4 000 000	15 600 000
Côte d'Ivoire	01/07/2007	01/08/2018	31/07/2024	330 000	352 000	682 000
Liberia	09/12/2015	09/12/2015	08/12/2020	357 000	357 000	714 000
São Tomé-et-Príncipe	01/06/2006	19/12/2019	18/12/2024	400 000	440 000	840 000
Mauritius	28/01/2014	08/12/2017	07/12/2021	220 000	355 000	575 000
Seychelles	24/02/2020	24/02/2020	23/02/2026	2 500 000	2 800 000	5 300 000
Cook Islands	14/10/2016	14/10/2016	13/11/2021	385 000	350 000	735 000

Source: DG MARE

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

** As from 2017 after introduction of a new fishing category within the SFA

- EU commitments to partner third countries between 2015 and 2020 represented an annual average of EUR 159 million in total, including EUR 126 million paid from the EU public budget** (EUR 98 million as contribution for access and EUR 28 million as contribution for sectoral support) and EUR 33 million paid by the owners of EU fishing vessels benefiting from the fishing opportunities available. About 90% of EU public contributions were allocated to the four partner third countries being a signatory to multispecies SFPAs. The other partner third countries were each allocated comparatively lower levels of EU public commitments (1% and less), except in the case of Seychelles (4%). By region, EU public commitments through the SFPAs included 81% for partner third countries in the Central Eastern Atlantic Ocean (e.g. West Africa), close to 13% for Greenland, 6% for partner third countries in the Indian Ocean, and 0.7% for partner third countries in the Pacific Ocean.
- Between 2015 and 2020, 211 EU fishing vessels per year on average utilised the fishing opportunities available through the SFPAs.** The EU fishing fleet having access to the waters of the partner third countries included large-scale distant-water vessels (e.g. demersal and small pelagic trawlers, tuna purse seiners and surface longliners), and small-scale fishing vessels based in EU regions adjacent to the waters of the partner third countries, including in the outermost regions of Spain (Canary Islands) and France (La Réunion and Mayotte). The EU fishing fleet having utilised fishing opportunities under SFPAs represented 0.3% of the total number of EU fishing

³ The SFA with Gabon became active in 2021 following the entry into force of a new Protocol on 29 June 2021 for a period of five years

vessels for all EU Member States, but 19% of the total fishing capacity of the EU fleet expressed in tonnage (GT) and 6% of the total fishing capacity of the EU fleet expressed in engine power (kW). The fishing vessels having utilised the fishing opportunities available between 2015 and 2020 were registered in 13 different EU Member States⁴. Fishing vessels from Spain represented 66% of the total number and 33% of the total capacity in GT of the EU fishing fleet operating within the framework of SFPAs.

9. **EU catch obtained in the waters of partner third countries averaged close to 300 000 tonnes per year** between 2015 and 2020, of which 49% by weight were small pelagic species, 39% highly migratory species, 10% various other fish species (mostly hake) and 2% crustacean species. The **average annual first-sale value of these catches was EUR 410 million**. Total EU catch within the framework of SFPAs represented 9% of the average total EU catch, contributing 21% of EU catches of highly migratory species and 8% of small pelagic species. Most catch obtained by EU vessels within the framework of SFPAs are consumed in the EU market. They meet 3% of the needs of the EU market for fisheries products, with the contribution being 6% for highly migratory species and 7% for small pelagic species. An estimated 27 000 tonnes of EU catch supplies the domestic markets in the partner third countries on an annual basis, mostly through sales of by-catches by EU tuna vessels and landings of in-kind contributions for access in Mauritania and Guinea Bissau for certain categories of EU trawlers.
10. **The employment linked to the activities of the EU vessels is estimated as being close to an annual average of 6 500, including 3 650 EU nationals and 2 850 nationals of third countries**. Most SFPAs mandate employment of defined numbers or proportions of nationals from the partner third countries or from ACP countries, with the provisions in SFPAs generally but not always complied with, or exceeded, by the operators of EU vessels. Working conditions onboard EU fishing vessels are governed by the international standards adopted by the International Labour Organisation according to the relevant provisions of SFPAs. Minimum professional training levels are those enacted by the convention adopted by the International Maritime Organisation that the main EU Member States involved in SFPAs have ratified⁵. In addition, the activities of EU vessels are estimated to support an additional annual average of 15 000 jobs in the fish processing sector of the partner third countries of which 9 000 are jobs for women.
11. **Certain partner third countries derived significant additional economic benefits from the activities of EU fishing vessels through the supply of goods and services to the EU fishing vessels, employment of labour onboard, and the processing of catch**. These benefits were derived by the partner third countries offering the enabling conditions for interactions with EU fishing vessels (e.g. Morocco, Mauritania, Cabo Verde, Senegal and Côte d'Ivoire in the Atlantic Ocean, Madagascar, Mauritius and Seychelles in the Indian Ocean, and Kiribati in the Pacific Ocean), such as ports with the capacity to berth large-scale vessels and/or fish processing industries compliant with EU food law. By contrast, partner third countries that could not offer enabling conditions have had no or little interaction with the EU fleet (Gabon, Guinea Bissau, Liberia and São Tomé-et-Príncipe in the Atlantic Ocean and Comoros in the Indian Ocean). SFPAs supported the creation of an annual average of EUR 477 million of direct and indirect economic value-added, with 52% of the economic value-added benefiting to third countries. SFPAs included proportioned provisions for mandating or encouraging interactions between the EU fleet and the partner third countries, as appropriate.

⁴ In alphabetical order: Denmark, Estonia, France, Germany, Greece, Italy, Latvia, Lithuania, Netherland, Poland, Portugal, Spain and the United Kingdom

⁵ The Convention STCW-F of the International Maritime Organisation was ratified by *inter alia* Denmark, France, Latvia, Lithuania, Netherlands, Poland, Portugal and Spain (situation end of 2020)

- 12. The EU contribution for sectoral support is to support priorities identified by the two parties in accordance with the national fisheries policy of the partner third countries and with the EU Common Fisheries Policy.** For each SFPA, a multiannual programme covering the duration of the Protocol was adopted in the framework of the Joint Committees, with identification of different activities and projects, and their associated budgets, foreseen to achieve the objectives defined under the priorities identified by the two parties. According to the provisions of the Protocols, progress towards the objectives are assessed on an annual basis by the Joint Committees based on reports expected from the partner third countries, and payment of the annual fraction of the EU contribution for sectoral support is released on the basis of the results obtained by the partner third countries. The EU has a right to suspend in part or in full the payments if the results do not meet the targets agreed in the work programme (which has happened). The implementation modalities of the EU contribution for sectoral support are generally defined by voluntary guidelines adopted in the framework of the Joint Committees, except in the context of the SFPA concluded with Mauritania for which implementation modalities were an annex to the Protocols implemented since 2012.
- 13. The EU contribution for sectoral support resulted in approximately EUR 200 million being channelled between 2015 and 2020 through the budgets of the partner third countries to contribute to the achievements of the Sustainable Development Goal 14** of the United Nations, and particularly to the achievements of its targets 14.b (access to markets) 14.4 (regulate harvesting and end overfishing and IUU fishing) and 14.a (increase scientific knowledge). The focus of the EU intervention was different according to the contexts: for most “small SFPAs” from a financial perspective (Cabo Verde, Comoros, Cook Islands, Côte d’Ivoire, Gabon, Kiribati, Liberia, Madagascar, Mauritius, São Tomé-et-Príncipe and The Gambia), the focus of budget use was on activities implemented under the sectoral support component was on SDG target 14.4 (regulate harvesting and end overfishing and IUU fishing), while significant budgets were allocated in support of SDG 14.b (access to markets) under the “large SFPAs” (Mauritania, Morocco and Seychelles). Sectoral support budgets addressing SDG 14.a (increase scientific knowledge) represented a significant share (at least 15%) of the EU contribution for sectoral support in Cabo Verde, Côte d’Ivoire, Greenland, Guinea Bissau, Mauritius, Morocco and Senegal.
- 14. Overall, 48% of the EU contribution for sectoral support implemented within the framework of SFPAs between 2015 and 2020 was utilised to support the public authorities in the partner third countries in the implementation of their tasks** (28% benefiting the managing authorities and 20% the research institutes), **and 52% was to support public investments benefiting to the fisheries sector** (19% for operators in the fishing and aquaculture sectors, including processing, and 33% to artisanal fishing communities). The balance between the two types of beneficiaries was variable according to the context and partner third country, with a majority of the EU contribution for sectoral support utilised to support public interventions benefiting to the private sector being within the framework of the SFPAs concluded with Kiribati, The Gambia, Mauritania, Morocco and Seychelles.
- 15. The strengthening of the capacities of the public authorities of the partner third countries for monitoring, control and surveillance of fishing activities, and for scientific research were the focal priorities of the sectoral support programmes implemented in almost all partner third countries** between 2015 and 2020. Activities implemented with the EU contribution for sectoral support included *inter alia*: modernisation of the Fisheries Monitoring Centres of the partner third countries through procurement of hardware and software to monitor the position of fishing vessels by satellite (Vessel Monitoring System) and to receive electronic declarations of catch (Electronic Reporting System); strengthening of the legal

framework; equipment and support for conducting patrols and scientific research surveys at sea; and support to the design and implementation of scientific data collection schemes. Other initiatives implemented with the EU financial contribution for sectoral support contributing to capacity building of the managing authorities included support for the identification and implementation of national fisheries management measures (e.g. Cook Islands, Comoros, Côte d'Ivoire, The Gambia, Guinea Bissau, Greenland, Kiribati, Mauritania, Morocco, Seychelles) and support for the payment of the mandatory contributions due by partner third countries to relevant international fisheries organisations (e.g. Cabo Verde, Côte d'Ivoire, Guinea Bissau, Liberia, Senegal, São Tomé-et-Príncipe).

16. **The EU contribution for sectoral support was utilised to support public interventions benefiting directly the fishing sector in the partner third countries** according to national priorities, and particularly the artisanal fishing communities (33% of the total EU contribution). Main activities benefiting the fishing sector were infrastructure development (Guinea Bissau, Morocco, Mauritania, Senegal and Seychelles) which absorbed 24% of the total EU contribution for sectoral support, the improvement of conditions at existing landing sites (storage and processing of artisanal products in Cabo Verde, Côte d'Ivoire, The Gambia, Guinea Bissau, Morocco, Senegal and Seychelles), safety at sea (provision of safety equipment to artisanal fishermen in Cabo Verde, Comoros, Cook Islands, Guinea Bissau, Madagascar and Senegal), and support to vocational training to attract and to enhance the professional skills of workers in the fisheries sector (Guinea Bissau, Mauritania, Morocco and Seychelles). Certain partner third countries used the sectoral support to develop incentives (loans, grants) for modernisation or adaptation of artisanal fleets (e.g. Cook Islands, Côte d'Ivoire, Mauritius, São Tomé-et-Príncipe, Seychelles).

MAIN CONCLUSIONS OF THE EVALUATION

Relevance: the extent to which SFPAs were (still) relevant to address the needs.

17. **The evaluation of the relevance of SFPAs confirmed that SFPAs provided an adequate framework to satisfy:**
- **the needs and objectives of the EU Common Fisheries Policy** in non-EU waters through the identification and monitoring of access modalities for EU vessels under conditions ensuring the sustainability of their fishing operations aligned with the standards of the Common Fisheries Policy and EU obligations stemming from relevant international instruments;
 - **the needs of the partner third countries** in terms of i) generating financial benefits from a surplus of their stocks and/or of their geographical position on the migration routes of highly migratory species and ii) establishment of a partnership with dedicated funding for the strengthening of their fisheries governance framework and the sustainable development of their fishing sectors; and
 - **the needs of the EU long-distance fleet and of certain segments of the EU artisanal fleet** in terms of access to productive fishing zones in external waters, and the establishment of a level playing field for EU operators and other foreign operators.

The decoupling of the EU contribution for access and the EU contribution for sectoral support was relevant to facilitate separate management of the two components by the parties in view of their different nature.

18. **However, the evaluation found that the relevance of SFPAs was undermined by i) the existence of dormant SFPAs** which prevented EU vessels from accessing the waters of partner third countries during multiannual periods, while at the same time, their foreign competitors could access the fishing zones, **and ii) the proportionality between the EU contribution for access and the EU**

contribution for sectoral support which limited the relevance of SFPAs in addressing the needs of the partner third countries, in particular for Least Developed Countries and Small Island Developing States.

Effectiveness: the extent to which SFPAs were successful in achieving their objectives.

19. **The approach followed within the framework of multispecies SFPAs to adapt EU fishing opportunities** from one Protocol to the next or during their implementation, **was effective in adapting EU fishing pressure on certain key stocks in West Africa** assessed as overexploited (small pelagic species, cephalopods). The approach produced positive results for some stocks now being exploited within sustainable limits, but was not always effective in ensuring the conservation of those stocks where the management framework implemented by the partner third country was not adequate to prevent increased fishing pressure by national or other foreign fleets. However, the surplus proved difficult to identify due to insufficient scientific information. **In the case of tuna SFPAs, SFPAs were effective** in ensuring that conservation and management measures adopted within the multilateral framework of Regional Fisheries Management Organisations (RFMOs) were also applied in the waters of the partner third countries.
20. **SFPAs were only slightly effective in implementing an ecosystem approach to fisheries management within the framework of multispecies SFPAs.** Although the question was on the agenda of the different Joint Scientific Committees, a lack of relevant scientific information prevented the identification of measures to reduce the levels of unwanted catch, to avoid interactions with protected species, and to mitigate potentially negative impacts of fishing gears on the seabed, including on vulnerable marine ecosystems. In contrast, **tuna SFPAs were effective in ensuring that the ecosystem measures** adopted by the relevant RFMOs were applied in the waters of the partner third countries, with certain SFPAs successful in imposing more stringent ecosystem measures (Cabo Verde, The Gambia, Seychelles).
21. **SFPAs were broadly effective in enhancing the capacities of the partner third country to monitor and control fishing activities** under their responsibilities, **with a positive contribution to the global fight against IUU fishing.** The main benefits of EU interventions within the framework of SFPAs were: i) the identification and implementation of **measures for the joint monitoring of EU vessels** operating within the framework of SFPAs; and ii) implementation of a significant share of the EU contribution for sectoral support to **enhance the technical and human capacities of the Fisheries Monitoring Centres** in partner third countries, to strengthen the legal framework, and to contribute to the deployment of patrol resources. However, the long-term effects of the interventions are not clear, particularly where information is lacking on the extent to which monitoring and control provisions imposed on EU vessels were extended to other fleets, and on the impacts of the EU contribution through sectoral support used for the running costs of the control authorities in the partner third countries. In addition, the evaluation noted a lack of consistency in the provisions for the exchange of electronic information for the monitoring of the EU vessels (vessels monitoring systems, electronic reporting systems) across the Protocols.
22. **SFPAs were effective in supporting the development of the scientific capacities in the partner third countries.** Through monitoring measures implemented under the access component, SFPAs supported the collection of fisheries-dependent information on the activities of EU vessels in the waters of the partner third countries used by the Joint Scientific Committees to monitor the abundance of the resources, and fostered the involvement of nationals of the partner third countries in scientific work (i.e. scientific observers, joint analysis in the framework of the Joint

Scientific Committees). SFPAs also contributed to the strengthening of research capacities through utilisation of the EU financial contribution for sectoral support for the modernisation of research facilities and implementation of data collection schemes (research surveys, catch sampling) in support of the management of the fishing sector. For certain partner third countries (e.g. Guinea Bissau, Mauritania, Morocco and Seychelles), **evidence demonstrates that the scientific information generated by interventions under the sectoral support component of SFPAs was used by the national managing authorities** for the design of fisheries management plans. However, the effectiveness of SFPAs was hindered by the difficulties of certain partner countries in maintaining a sufficient pool of trained scientific personnel.

23. **EU interventions through the access component of SFPAs were effective in contributing to the maintenance / creation of close to 20 000 jobs for the nationals of the third countries, and in supporting the creation of an annual average of EUR 477 million of economic value-added.** However, the socio-economic benefits derived by third countries from the activities of EU vessels within the framework of SFPAs were unevenly distributed, with higher benefits for partner third countries that were able to offer attractive conditions for interactions between their fishing sectors and the EU fleets. Although outdated according to EU social partners, the social clause included in all SFPAs was effective in ensuring decent working conditions to the nationals of third countries employed onboard EU vessels, as evidenced by the feedback received from targeted consultations, with the exception of the level of wages which were raised by some trade unions as being possibly below international standards in certain cases.
24. **EU interventions through the sectoral component of SFPAs were effective in supporting the social and economic development of the fisheries sector, and particularly the artisanal sector in partner third countries.** The activities implemented focussed on infrastructure development, improvements to the conditions at landing sites, safety at sea, and vocational training according to the contextual needs identified and the budgets available. While the impacts of the different interventions are difficult to fully assess due to a lack of information on the long-term effects of the different activities included in the multiannual programmes, evidence available from certain partner third countries suggest that this was broadly the case. The utilisation of the EU contributions for maintaining or obtaining the authorisation to export fisheries products to the EU was globally effective in contexts where sanitary conditions were selected by the two parties in the priorities of the multiannual programmes.
25. **SFPAs were broadly effective in supporting the activities of an annual average of 211 EU fishing vessels between 2015 and 2020, representing 19% of the EU's total fishing capacity expressed in tonnage (GT) and 6% of its total fishing capacity expressed in power (kW).** SFPAs provided an effective framework to support the economic sustainability of the EU external fleet, with positive effects in terms of the employment of an annual average of 3 600 nationals from EU Member States. According to the relevant EU operators, the effectiveness of the EU interventions through SFPAs could be further improved by: i) concluding new SFPAs with third countries whose waters present an interest to them; and ii) addressing the case of dormant SFPAs without an implementing Protocol, which have adverse effects on their deployment strategies and on the establishment of a level playing field vis-à-vis their foreign competitors in external waters.

Efficiency: the relationships between the resources used by SFPAs and the outcomes of the intervention

26. **The extent to which the fishing opportunities negotiated were commensurate with the interests of the EU fleet since 2015 was variable** based on a review of the rate of utilisation of these fishing opportunities by EU vessels. There has been a

continuous effort since the early 2000s to adapt the fishing opportunities from one Protocol to the next taking into account the utilisation of fishing opportunities available along with other factors such as conservation objectives. In the case of multispecies SFPAs, there is less evidence for adaptations from one Protocol to the next to address underused fishing opportunities, except in the case of fishing opportunities for small pelagic species in Mauritania which were halved between 2006 and 2015. Despite this finding however, the access component of SFPAs nevertheless resulted in a positive benefit-cost ratio of the EU investment. The benefit-cost ratio was generally higher for tuna SFPAs than for multispecies SFPAs, suggesting for the former better adjustment of the access costs to the value of the species exploited, and/or better performance in terms of utilisation of fishing opportunities negotiated. The evaluation found that there were no adequate provisions in the SFPAs for adaptation of the EU financial contribution for access where a reduced level of exploitation of fishing opportunities is established, and that not all SFPAs considered a provision for adaptation of the EU financial contribution for access following substantial changes in the policy affecting the relevant provision of the Protocols.

27. **The EU contribution for sectoral support was generally aligned with the absorption capacity of the partner third countries** as evidenced by the generally full payments of the EU contribution for sectoral support identified by the SFPAs within the periods covered by the Protocols. Where this was not the case, SFPAs considered an adaptation of the EU contribution for sectoral support from one Protocol to the next, or specific provisions to ensure utilisation of the EU contribution identified under a previous Protocol before releasing the EU contribution identified under the ongoing Protocol. **However, a review of the implementation of the different SFPAs established that payments rules detailed in the voluntary implementing guidelines were not successful in ensuring full technical implementation of the multiannual programmes** agreed within the periods covered by the Protocols, resulting in certain activities being fully paid for before the expiry of the Protocols on the expectation that they would be completed. This also generated uncertainty over the legal provisions governing the monitoring of these activities. This could be attributed to flexible conditions within SFPAs for decommitments in case of delayed technical implementation until a recent past. In addition, the evaluation found that the legal competence of the EU party to exercise financial controls over the utilisation of the EU contribution for sectoral support by the partner third countries is unclear. The extent to which the partner third countries' management of public finances was sufficiently transparent, reliable and effective to ensure utilisation of the EU contribution for sectoral support was assessed by the European Commission for partner third countries with one or more budget support contracts implemented under the EU cooperation programme.

Coherence: the extent to which the interventions under SFPAs fit with other interventions

28. **EU interventions through SFPAs were coherent with other EU interventions under the Common Fisheries Policy. SFPAs coherently supported EU activities within the framework of international organisations** through alignment of access rules with the conservation and management measures adopted by RFMOs, with a potential leverage effect on other fleets through application of the non-discrimination clause. The EU contribution for sectoral support within the framework of SFPAs contributed to enhancing the capacities of the partner third countries to comply with their international obligations, particularly in the Indian Ocean. The clause on regional cooperation recently introduced in one SFPA (Seychelles) strengthened the role of SFPAs in supporting international cooperation. **EU interventions through SFPAs coherently supported the implementation of the IUU Regulation** through capacity building of the authorities of the partner third countries for monitoring, control and surveillance, and coherently accompanied the zero-tolerance approach promoted

by the EU through the European Commission's own initiative of refraining from negotiating SFPAs with third countries which have not tackled the shortcomings notified to them under IUU pre-notification procedures.

29. **SFPAs coherently supported the implementation of the EU's International Ocean Governance agenda and its Farm to Fork strategy** by promoting sustainable exploitation of commercial stocks falling under the scope of the instrument. However, SFPAs were less successful in contributing to the objectives of these overarching policies in relation to the protection of marine ecosystems and in incentivising partner third countries to ratify international instruments governing training and working conditions in the fisheries sector. By the end of 2020, SFPAs had had relatively few interventions in sectors of the blue economy outside traditional fisheries and aquaculture sectors. However, SFPAs are an instrument implementing the Common Fisheries Policy and as such, are expected to focus on measures falling under the scope of the policy.
30. **EU interventions within the framework of SFPAs were coherent with EU interventions for development.** The evaluation identified numerous examples of **synergies** between the activities implemented under the sectoral support component of SFPAs and activities implemented at national and regional levels under relevant EU cooperation programmes. There are also examples of **complementarities** where EU cooperation programmes addressed areas not included in the scope of the SFPAs' sectoral support programmes as a result of budgets available and/or priorities selected, and vice-versa. Furthermore, all EU Delegations consulted during the evaluation confirmed that the presence of an SFPA in the portfolio of EU activities in the partner third countries was useful in including fisheries in the scope of the political dialogue when dealing with cross-cutting issues such as governance, environment and economic growth. Coherence was ensured through regular ad-hoc consultations. However, several EU Delegations noted that there are no established formal mechanisms for such consultations.
31. **SFPAs coherently supported the EU trade agenda of certain third countries through interventions under the sectoral support component aimed at facilitating trade**, such as activities aimed at maintaining or obtaining the authorisations to export fisheries products to the EU, and interventions supporting the development and upgrading of fish landing sites. The framework of SFPAs provided a tool to contribute to the establishment of a level playing field for EU and foreign fishing fleets supplying the EU market for those fishing activities falling under the scope of the SFPAs, through the expected application of the non-discrimination clause.

EU added-value: the value resulting from the EU intervention through SFPAs

32. **The EU interventions through SFPAs resulted in added-value compared to what could have been achieved by other means**, noting that negotiation and implementation of public fishing agreements are an exclusive competence of the EU in accordance with the Treaty on the Functioning of the EU. SFPAs created a robust multiannual legal framework governing the activities of EU vessels in the waters of partner third countries, with a dedicated financial instrument to implement a partnership between the EU and the third countries to support the implementation of sustainable fisheries policy and to foster the economic and social development of their fishing sectors.

Acceptability: the perception of interventions under SFPAs by the targeted stakeholders and/or by the general public

33. **Public perception on SFPAs has remained largely focused on their access component, with feedback received during the evaluation suggesting mixed**

levels of acceptability by civil society in the partner third countries. The positive contribution of the activities implemented under the sectoral support component of SFPAs is often largely unknown by the expected beneficiaries and by civil society in the EU and in the partner third countries. **Feedback received from the evaluation's targeted consultation confirmed an almost unanimous request from stakeholders for improved transparency** on the implementation of the access and sectoral components of SFPAs to underpin informed public debate and to strengthen the accountability of the two parties. The need for adequate communication and visibility plans was clearly identified by the European Commission to improve public awareness about the activities funded by the EU contribution for sectoral support, with relevant measures introduced in the framework of certain recently negotiated Protocols.

CONCLUSION

34. The overall conclusion of the evaluation is that SFPAs are fit for purpose in their contribution to the objectives of: i) contributing towards resource conservation and environmental sustainability through rational and sustainable exploitation of living marine resources of the waters of the partner third countries; ii) contributing to the continued activities of the EU fishing fleets operating in external waters, and the employment linked to these fleets; and iii) supporting the development of a sustainable fisheries sector in the partner third countries.

35. The overall positive assessment of SFPAs performance is underpinned by the following key findings of the evaluation:

- SFPAs provided a relevant tool to address the needs and objectives of the different entities concerned (the EU, the owners of EU fishing vessels and the partner third countries). The decoupling of the EU contribution for access and the EU contribution for sectoral support was relevant to ensure the separate management of the two components.
- Identification and adaptation over time of fishing opportunities for EU vessels based on scientific advice, under the oversight of dedicated independent Joint Scientific Committees within the framework of multispecies SFPAs.
- Alignment of access conditions with conservation and management measures adopted by the relevant Regional Fisheries Management Organisations within the framework of tuna SFPAs.
- Proportionate provisions in the SFPAs for mandating or encouraging direct economic interactions between the EU fishing fleet and the fisheries sector of the partner third countries.
- Positive contributions of SFPAs to building the capacities of the partner third countries for monitoring, control and surveillance, to supporting implementation of research activities in support of fisheries management, and to promoting the social and economic development of the fisheries sector in the partner third countries as appropriate.
- Improvements in the alignment of the fishing opportunities negotiated with the actual needs of the EU fishing fleet from one Protocol to the next, particularly for tuna SFPAs.
- Satisfactory alignment of the EU contribution for sectoral support with the absorption capacity of the partner third countries, with appropriate measures to adapt payments when this was not the case.
- Good coherence between the interventions deployed within the framework of SFPAs and the interventions deployed under EU cooperation initiatives, as evidenced by the complementarities and synergies achieved.
- Clear added-value of the EU interventions through SFPAs compared to what could be achieved by other means.

36. However, the evaluation identified certain areas for improvement of the performance of the instrument, particularly related to implementation. The main suggested areas for action and improvement are:

- Increased consideration of the development status of the partner third country when identifying the EU financial contribution for sectoral support.
- Review of dormant SFPAs and consideration of how to address the interruption of fishing activities imposed by the exclusivity clause.
- Improved monitoring by the Joint Committees of the application of the non-discrimination clause and of its supporting transparency clause by the partner third countries. This would ensure the extension of the standards of the Common Fisheries Policy imposed on EU vessels through SFPAs to other fishing fleets having access to the waters of the partner third countries.
- Strengthening of the scientific inputs to the design of ecosystem measures and the formal identification of surplus within the framework of multispecies SFPAs.
- Harmonisation of templates governing the electronic exchange of monitoring information between the EU Member States and the partner third countries.
- Updating of the social clause governing working conditions onboard EU vessels to better reflect applicable international standards, and identification of mechanisms to monitor their implementation.
- Inclusion of provisions in the SFPAs for adaptation of the EU financial compensation for access in cases of low utilisation of fishing opportunities, and/or where changing technical conditions impact the operational capacity of the EU fleet to exploit the fishing opportunities obtained.
- Increased focus on assessing the technical and operational achievements resulting from the implementation over time of the EU contribution for sectoral support.
- Establishment of clear legal competences for the EU party to verify as appropriate expenses reported by the partner third countries about utilisation of the EU financial contribution for sectoral support.
- Definition of internal coordination mechanisms between the relevant Commission's services to ensure the continued consistency between SFPAs and other EU interventions affecting the partner third countries.
- Consideration of the introduction of a clause in SFPAs encouraging the partner third countries to refrain from granting fishing authorisations to fishing vessels flying the flag of a third country identified by the EU as non-cooperating in fighting illegal, unreported and unregulated fishing.
- Improved public transparency and communication about the outcomes and impacts of the implementation of the access and sectoral support components of SFPAs.

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RÉSUMÉ

- 1. Les Accords de Partenariat dans le domaine de la Pêche Durable (APPDs) sont des accords internationaux conclus avec des pays tiers partenaires visant à permettre d'accéder à leurs eaux et à leurs ressources** pour exploiter de manière durable une partie du surplus des ressources biologiques en échange d'une compensation financière de l'UE, laquelle comprend un soutien sectoriel. Il existe deux principaux types d'APPDs permettant l'accès des navires de l'UE aux eaux des pays tiers partenaires : les APPD donnant accès à l'exploitation d'un large éventail de stocks de poissons (les APPDs dits "multi-espèces"), et les APPDs donnant accès à l'exploitation des espèces hautement migratoires (les APPDs dits "thoniers").
- 2. En décembre 2020, il y avait treize APPDs avec des protocoles d'application en vigueur**, dont quatre APPDs multi-espèces (Groenland, Mauritanie, Maroc et Guinée-Bissau) et neuf APPDs thoniers (Cabo Verde, Îles Cook, Côte d'Ivoire, Gambie, Liberia, Maurice, São Tomé-et-Príncipe, Sénégal et Seychelles), avec, dans le cas de la Gambie et du Sénégal, des possibilités de pêche supplémentaires limitées pour l'exploitation des espèces démersales. En outre, il y avait sept APPDs sans protocole d'application en vigueur - les APPDs dits dormants (Guinée Équatoriale, Gabon jusqu'en 2021⁶, Kiribati, États Fédérés de Micronésie, Madagascar, Mozambique et Îles Salomon).
- 3. Les paiements de l'UE aux pays tiers partenaires entre 2015 et 2020 ont représenté une moyenne annuelle de 159 millions d'euros au total, dont 126 millions d'euros versés par le budget public de l'UE** (98 millions d'euros au titre de la contribution à l'accès et 28 millions d'euros au titre de la contribution au soutien sectoriel) et **33 millions d'euros versés par les propriétaires des navires de pêche de l'UE** bénéficiant des possibilités de pêche disponibles. Environ 90 % de la contribution de l'UE concernait les APPDs multi-espèces conclus avec la Guinée-Bissau, le Groenland, la Mauritanie et le Maroc.
- 4. Entre 2015 et 2020, une moyenne annuelle de 211 navires de pêche de l'UE battant pavillon de treize États membres de l'UE** a utilisé les possibilités de pêche disponibles pour capturer près de 300 000 tonnes de produits de la pêche, dont 49 % de petits pélagiques et 39 % de grands migrateurs. Les activités de la flotte de l'UE opérant dans le cadre des APPDs ont directement soutenu l'emploi de d'une moyenne annuelle de 3 650 ressortissants de l'UE et de 2 650 ressortissants de pays tiers, avec 15 000 emplois supplémentaires soutenus dans les pays tiers en moyenne annuelle dans le secteur de la transformation du poisson, dont 9 000 femmes. Les pays tiers partenaires qui ont pu offrir des conditions favorables aux interactions entre la flotte de l'UE et leur secteur de la pêche ont retiré des avantages économiques et sociaux supplémentaires des activités des navires de l'UE opérant dans le cadre des APPDs.
- 5. L'approche suivie dans les APPDs multi-espèces pour adapter les possibilités de pêche de l'UE d'un protocole à l'autre ou pendant leur mise en œuvre, a été efficace pour adapter la pression de pêche de l'UE sur certains stocks clés en Afrique de l'Ouest** qui ont été évalués comme surexploités (petits pélagiques, céphalopodes). L'approche a donné des résultats positifs pour certains stocks qui sont maintenant exploités dans les limites de la durabilité, mais elle n'a pas toujours été efficace pour assurer la conservation des stocks pour lesquels le cadre de gestion mis en œuvre par les pays tiers partenaires n'était pas suffisant pour empêcher une pression de pêche accrue de la part des flottes nationales ou étrangères. **Dans le cas des APPDs thoniers**, les APPDs ont été efficaces pour assurer que les mesures de conservation et de gestion adoptées dans le cadre multilatéral des organisations régionales de gestion des pêches (ORGP) étaient également appliquées dans les eaux des pays tiers partenaires.

⁶ L'APPD avec le Gabon est devenu actif en 2021 après l'entrée en vigueur le 29 juin 2021 d'un nouveau Protocole pour une période de cinq années

6. **La contribution de l'UE au soutien sectoriel a permis d'acheminer environ 200 millions d'euros entre 2015 et 2020 par l'intermédiaire des budgets des pays tiers partenaires afin de contribuer à la réalisation de l'Objectif de Développement Durable 14** des Nations unies, et notamment à la réalisation de ses cibles 14.b (accès aux marchés) 14.4 (réglementer les prélèvements et mettre fin à la surpêche et à la pêche INN) et 14.a (accroître les connaissances scientifiques). L'évaluation a confirmé que les interventions de l'UE dans le cadre des APPDs étaient cohérentes avec d'autres interventions de l'UE touchant le secteur de la pêche des pays tiers partenaires par le biais de programmes de développement mis en œuvre aux niveaux national ou régional, avec **de nombreux exemples de synergies et de complémentarités entre les différentes interventions de l'UE.**
7. **Les activités mises en œuvre dans le cadre du volet soutien sectoriel des APPDs ont contribué à renforcer les capacités des pays tiers partenaires à lutter contre la pêche INN et à mener des recherches scientifiques.** Les APPDs ont contribué au renforcement des capacités des pays tiers partenaires dans le domaine du suivi, du contrôle et de la surveillance, notamment par : i) la modernisation des centres de surveillance des pêches des pays tiers partenaires par l'acquisition de matériel et de logiciels permettant de suivre la position des navires de pêche par satellite (système de surveillance des navires) et de recevoir les déclarations électroniques de capture (système de déclaration électronique), ii) le renforcement du cadre juridique, et iii) l'équipement et le soutien pour la conduite de patrouilles de surveillance. **En ce qui concerne la recherche scientifique,** les APPDs ont soutenu la mise en œuvre de campagnes de recherche en mer et de systèmes de collecte de données, avec les résultats des activités de recherche directement utilisés par les pays tiers partenaires dans la conception des plans de gestion de pêcheries. Le programme d'appui sectoriel a également renforcé les capacités des pays tiers partenaires à maintenir ou à obtenir l'accord des autorités sanitaires de l'UE pour exporter des produits de la pêche et de l'aquaculture vers l'UE, et à mettre en œuvre et gérer des aires marines protégées.
8. **D'autres activités mises en œuvre dans le cadre du volet soutien sectoriel des APPDs ont soutenu des investissements publics bénéficiant au secteur de la pêche dans les pays tiers partenaires, particulièrement le secteur de la pêche artisanale.** En fonction du contexte et du budget disponible, la contribution de l'UE à l'appui sectoriel a été utilisée pour le développement d'infrastructures (sites de débarquement, sites de transformation, infrastructures sociales), la modernisation des sites de débarquement existants et l'amélioration des conditions de manutention et de transformation des débarquements après le débarquement, la sécurité en mer (capacités de recherche et de sauvetage, équipements de sécurité pour les pêcheurs artisanaux), la formation professionnelle pour attirer et améliorer les compétences professionnelles des travailleurs du secteur de la pêche, et la mise en œuvre de programmes nationaux pour encourager la modernisation ou l'adaptation des flottes artisanales.
9. **La conclusion générale de l'évaluation est que les APPDs sont adaptés aux besoins** en ce qui concerne leur contribution aux objectifs suivants : i) contribuer à la conservation des ressources et à la durabilité environnementale par une exploitation rationnelle et durable des ressources marines vivantes des eaux des pays tiers partenaires, ii) contribuer à la poursuite des activités des flottes de pêche de l'UE opérant dans les eaux extérieures et à l'emploi lié à ces flottes, et iii) soutenir le développement d'un secteur de la pêche durable dans les pays tiers partenaires. **Toutefois, l'évaluation a identifié certains domaines dans lesquels les performances de l'instrument peuvent être améliorées, notamment en ce qui concerne la mise en œuvre.**

RÉSUMÉ EXÉCUTIF

CONTEXTE DE L'ÉVALUATION

- 1. Les Accords de Partenariat dans le domaine de la Pêche Durable (APPDs) sont des accords internationaux conclus avec des pays tiers partenaires dans le but d'obtenir l'accès à leurs eaux et à leurs ressources** afin d'exploiter de manière durable une partie du surplus des ressources biologiques en échange d'une compensation financière de l'UE, qui comprend un appui sectoriel. Il existe deux principaux types d'APPDs permettant l'accès des navires de l'UE aux eaux des pays tiers partenaires : les APPDs donnant accès à l'exploitation d'un large éventail de stocks de poissons (les APPDs dits "multi-espèces") et les APPDs donnant accès à l'exploitation des espèces hautement migratoires (les APPDs dits "thoniers").
- 2. L'évaluation des interventions de l'UE dans le cadre des APPDs a été réalisée conformément aux lignes directrices pour une meilleure réglementation publiées par l'UE.** La méthodologie d'évaluation comprenait la collecte de données et la recherche documentaire dans les rapports et bases de données disponibles, des consultations ciblées des parties prenantes dans l'UE et dans les pays tiers partenaires, ainsi qu'une consultation publique. Cette dernière a été lancée sur le site internet⁷ de consultations de la Commission européenne entre mars et juin 2021. L'évaluation s'est concentrée sur la période 2015-2020, mais a pris en compte des périodes antérieures lorsque cela était pertinent pour l'évaluation.
- 3. L'objectif général des APPDs est de garantir que les activités de pêche dans les eaux des pays tiers partenaires sont déployées conformément aux obligations internationales de l'UE ainsi qu'aux objectifs et principes de la Politique Commune de la Pêche de l'UE.** Les objectifs spécifiques des APPDs sont i) de contribuer à la conservation des ressources et à l'exploitation durable des ressources marines dans les eaux des pays tiers partenaires, ii) de contribuer à la protection de la flotte hauturière de l'UE et de l'emploi lié à cette flotte, et iii) de soutenir le développement d'un secteur de la pêche durable dans les pays tiers partenaires.
- 4. Les APPDs comportent deux volets : le volet accès,** qui définit les conditions techniques et financières régissant l'accès des navires de pêche de l'UE aux eaux des pays tiers partenaires, **et le volet appui sectoriel,** qui définit la portée et les principes régissant l'utilisation du soutien de l'UE à la mise en œuvre de la politique de la pêche du pays tiers partenaire. Les contributions de l'UE pour l'accès et pour l'appui sectoriel sont découplées, ce qui signifie qu'elles sont soumises à des règles de paiement distinctes.
- 5. Quatre principes clés, promulgués par des clauses spécifiques dans tous les APPDs, sous-tendent le cadre de gouvernance des APPDs : les droits de l'homme et le respect des principes démocratiques** en tant qu'éléments essentiels des APPDs, **la non-discrimination** interdisant l'octroi de conditions plus favorables à d'autres flottes que celles accordées aux opérateurs de l'UE, **la transparence** pour garantir la disponibilité des informations pertinentes sur les accords accordant l'accès à d'autres flottes, et **l'exclusivité** interdisant l'accès aux eaux des pays tiers partenaires aux navires de l'UE à moins qu'ils ne soient en possession d'une autorisation de pêche délivrée conformément à l'APPD.
- 6. En décembre 2020, il y avait treize APPDs avec des Protocoles d'application en vigueur,** dont quatre APPDs multi-espèces (Groenland, Mauritanie, Maroc et Guinée-Bissau) et neuf APPDs thoniers (Cabo Verde, îles Cook, Côte d'Ivoire, Gambie,

⁷ <https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/12728-Fisheries-evaluation-of-the-EU%E2%80%99s-sustainable-fisheries-partnership-agreements-SFPAs- fr>

Liberia, Maurice, São Tomé-et-Príncipe, Sénégal et Seychelles). Dans le cas de la Gambie et du Sénégal, des possibilités de pêche supplémentaires limitées sont disponibles pour exploiter les espèces démersales. En outre, sept APPDs n'avaient pas de Protocole d'application en vigueur à cette date - les APPDs dits "dormants" (Guinée équatoriale, Gabon jusqu'en 2021⁸, Kiribati, États Fédérés de Micronésie, Madagascar, Mozambique et Îles Salomon). Le tableau suivant présente les contributions publiques de l'UE engagées au titre des treize APPDs dont les Protocoles d'application étaient en vigueur en décembre 2020.

Les treize APPDs avec un Protocole d'application en vigueur en décembre 2020

Pays tiers partenaire	Date d'entrée en vigueur de l'APPD	Date de début du Protocole	Date de fin du Protocole	Contribution annuelle de l'UE pour l'accès* (EUR)	Contribution annuelle de l'UE pour l'appui sectoriel* (EUR)	Total de la contribution annuelle de l'UE* (EUR)
Groenland	01/01/2013	01/01/2016	31/12/2020	13 168 978	2 931 000	16 099 978
Maroc	18/07/2019	18/07/2019	17/07/2023	19 100 000	17 900 000	37 000 000
Cabo Verde	20/03/2007	20/05/2019	19/05/2024	400 000	350 000	750 000
Mauritanie	30/11/2006	16/11/2015	15/11/2021	57 500 000**	4 125 000	61 625 000
Sénégal	20/11/2014	18/11/2019	17/11/2024	800 000	900 000	1 700 000
Gambie	31/07/2019	31/07/2019	30/07/2025	275 000	275 000	550 000
Guinée Bissau	16/06/2007	15/06/2019	14/06/2024	11 600 000	4 000 000	15 600 000
Côte d'Ivoire	01/07/2007	01/08/2018	31/07/2024	330 000	352 000	682 000
Liberia	09/12/2015	09/12/2015	08/12/2020	357 000	357 000	714 000
São Tomé-et-Príncipe	01/06/2006	19/12/2019	18/12/2024	400 000	440 000	840 000
Maurice	28/01/2014	08/12/2017	07/12/2021	220 000	355 000	575 000
Seychelles	24/02/2020	24/02/2020	23/02/2026	2 500 000	2 800 000	5 300 000
Îles Cook	14/10/2016	14/10/2016	13/11/2021	385 000	350 000	735 000

Source: DG MARE

Note: * Les contributions annuelles de l'UE indiquées dans le tableau sont pour la première années des Protocoles. Pour certains Protocoles, elles peuvent augmenter ou diminuer au fil du temps
 ** A partir de 2017 après l'introduction d'une nouvelle catégorie de pêche dans l'APPD

- 7. Les paiements de l'UE aux pays tiers partenaires entre 2015 et 2020 ont représenté une moyenne annuelle de 159 millions d'euros au total, dont 126 millions d'euros versés par le budget public de l'UE** (98 millions d'euros de contribution pour l'accès et 28 millions d'euros de contribution pour le soutien sectoriel) et 33 millions d'euros versés par les propriétaires de navires de pêche de l'UE bénéficiant des possibilités de pêche disponibles. Environ 90% des contributions publiques de l'UE ont été allouées aux quatre pays tiers partenaires signataires d'APPDs multi-espèces. Les autres pays tiers partenaires ont bénéficié de niveaux comparativement plus faibles d'engagements publics de l'UE (1% et moins), sauf dans le cas des Seychelles (4%). Par région, les engagements publics de l'UE dans le cadre des APPDs comprenaient 81% pour les pays tiers partenaires de l'Atlantique Centre-Est (principalement Afrique de l'Ouest), près de 13% pour le Groenland, 6% pour les pays tiers partenaires de l'océan Indien et 0,7% pour les pays tiers partenaires de l'océan Pacifique.
- 8. Entre 2015 et 2020, 211 navires de pêche de l'UE par an en moyenne ont utilisé les possibilités de pêche disponibles sous les APPDs.** La flotte de pêche de l'UE ayant accès aux eaux des pays tiers partenaires comprenait des navires

⁸ L'APPD avec le Gabon est devenu actif en 2021 après l'entrée en vigueur le 29 juin 2021 d'un nouveau Protocole pour une période de cinq années

hauturiers à grande échelle (par exemple, chalutiers démersaux et petits pélagiques, thoniers senneurs et palangriers de surface), ainsi que des navires de pêche à petite échelle basés dans les régions de l'UE adjacentes aux eaux des pays tiers partenaires, y compris dans les régions ultrapériphériques de l'Espagne (îles Canaries) et de la France (La Réunion et Mayotte). La flotte de pêche de l'UE ayant utilisé des possibilités de pêche au titre des APPDs représentait 0,3% du nombre total de navires de pêche de l'UE pour tous les États membres de l'UE, mais 19% de la capacité de pêche totale de la flotte de l'UE exprimée en tonnage (GT) et 6% de la capacité de pêche totale de la flotte de l'UE exprimée en puissance motrice (kW). Les navires de pêche ayant utilisé les possibilités de pêche disponibles entre 2015 et 2020 étaient enregistrés dans 13 États membres de l'UE différents⁹. Les navires de pêche de l'Espagne représentaient 66% du nombre total et 33% de la capacité totale en GT de la flotte de pêche de l'UE opérant dans le cadre des APPDs.

9. **Les captures de l'UE obtenues dans les eaux des pays tiers partenaires ont atteint en moyenne près de 300 000 tonnes par an** entre 2015 et 2020, dont 49% en poids de petits pélagiques, 39% de grands migrateurs, 10% de diverses autres espèces de poissons (principalement du merlu) et 2% de crustacés. **La valeur annuelle moyenne à la première vente de ces captures était de 410 millions d'euros.** Les captures totales de l'UE dans le cadre des APPDs représentaient 9% de la moyenne des captures totales de l'UE, contribuant à 21% des captures de l'UE d'espèces hautement migratoires et à 8% des espèces de petits pélagiques. La plupart des captures obtenues par les navires de l'UE dans le cadre des APPDs sont consommées sur le marché de l'UE. Elles répondent à 3% des besoins du marché de l'UE en produits de la pêche, la contribution étant de 6% pour les espèces hautement migratoires et de 7% pour les petits pélagiques. On estime que 27 000 tonnes de captures de l'UE approvisionnent chaque année les marchés intérieurs des pays tiers partenaires, principalement par la vente de captures accessoires par les thoniers de l'UE et par le débarquement de contributions en nature pour l'accès par certaines catégories de chalutiers de l'UE en Mauritanie et en Guinée-Bissau.
10. **L'emploi direct lié aux activités des navires de l'UE est estimé à près d'une moyenne annuelle de 6 500 personnes, dont 3 650 ressortissants de l'UE et 2 850 ressortissants de pays tiers.** La plupart des APPDs prévoient l'emploi d'un nombre ou d'une proportion définie de ressortissants des pays tiers partenaires ou des pays ACP. Les dispositions des APPDs sont généralement, mais pas toujours, respectées, voire dépassées, par les propriétaires des navires de l'UE. Les conditions de travail à bord des navires de pêche de l'UE sont régies par les normes internationales adoptées par l'Organisation Internationale du Travail, conformément aux dispositions pertinentes des APPDs. Les niveaux minimaux de formation professionnelle sont ceux prévus par la Convention adoptée par l'Organisation Maritime Internationale que les principaux États membres de l'UE concernés par les APPDs ont ratifiée¹⁰. En outre, on estime que les activités des navires de l'UE soutiennent en moyenne annuelle 15 000 emplois supplémentaires dans les pays tiers partenaires dans le secteur de la transformation du poisson, dont 9 000 emplois pour les femmes.
11. **Certains pays tiers partenaires ont tiré d'importants avantages économiques supplémentaires des activités des navires de pêche de l'UE par la fourniture de biens et de services aux navires de pêche de l'UE, l'emploi de marins à bord et le traitement des captures à terre.** Ces avantages ont été obtenus par les pays tiers partenaires offrant les conditions propices aux interactions avec les navires de

⁹ Par ordre alphabétique : Allemagne, Danemark, Espagne, Estonie, France, Grèce, Italie, Lettonie, Lituanie, Pays-Bas, Pologne, Portugal, et le Royaume-Uni

¹⁰ La convention STCW-F de l'Organisation Maritime Internationale a été ratifiée, entre autres, par le Danemark, l'Espagne, la France, la Lettonie, la Lituanie, les Pays-Bas, la Pologne et le Portugal (situation fin 2020).

pêche de l'UE (par exemple, le Maroc, la Mauritanie, le Cap-Vert, le Sénégal et la Côte d'Ivoire dans l'océan Atlantique, Madagascar, Maurice et les Seychelles dans l'océan Indien, et Kiribati dans l'océan Pacifique), tels que des ports ayant la capacité d'accueillir des navires de grande taille et/ou des industries de transformation du poisson conformes à la réglementation alimentaire de l'UE. En revanche, les pays tiers partenaires qui n'ont pas été en mesure d'offrir des conditions favorables ont eu peu ou pas d'interactions avec la flotte de l'UE (Gabon, Guinée-Bissau, Liberia et São Tomé-et-Príncipe dans l'océan Atlantique et Comores dans l'océan Indien). Les APPDs ont soutenu la création d'une moyenne annuelle de 477 millions d'euros de valeur ajoutée économique directe et indirecte, 52 % de cette valeur ajoutée économique bénéficiant aux pays tiers. Les APPDs comprenaient des dispositions proportionnées pour rendre obligatoire ou encourager les interactions entre la flotte de l'UE et les pays tiers partenaires, selon les cas.

- 12. La contribution de l'UE à l'appui sectoriel vise à soutenir les priorités définies par les deux parties conformément à la politique nationale de la pêche des pays tiers partenaires et à la Politique Commune de la Pêche de l'UE.** Pour chaque APPD, un programme pluriannuel couvrant la durée du protocole a été adopté dans le cadre des Commissions Mixtes, avec l'identification des différentes activités et projets, et de leurs budgets associés, prévus pour atteindre les objectifs définis dans le cadre de ces priorités identifiées par les deux parties. Conformément aux dispositions des protocoles, les progrès accomplis dans la réalisation des objectifs sont évalués chaque année par les Commissions Mixtes sur la base des rapports attendus des pays tiers partenaires, et le paiement de la fraction annuelle de la contribution de l'UE à l'appui sectoriel est libéré sur la base des résultats obtenus par les pays tiers partenaires. L'UE a le droit de suspendre en partie ou en totalité les paiements si les résultats ne répondent pas aux cibles approuvées dans le programme pluriannuel (ce qui s'est produit). Les modalités de mise en œuvre de la contribution de l'UE pour l'appui sectoriel sont généralement définies par des lignes directrices volontaires adoptées dans le cadre des Commissions Mixtes, sauf dans le contexte de l'APPD conclu avec la Mauritanie pour lequel les modalités de mise en œuvre constituaient une annexe aux protocoles mis en œuvre depuis 2012.
- 13. La contribution de l'UE pour le soutien sectoriel s'est traduite par l'acheminement d'environ 200 millions d'euros entre 2015 et 2020 par le biais des budgets des pays tiers partenaires afin de contribuer à la réalisation de l'Objectif de Développement Durable 14 des Nations unies,** et notamment à la réalisation de ses cibles 14.b (accès aux marchés) 14.4 (réglementer les prélèvements et mettre fin à la surpêche et à la pêche INN) et 14.a (accroître les connaissances scientifiques). L'intervention de l'UE a été axée différemment selon les contextes : pour la plupart des « petits APPDs » d'un point de vue financier (Cabo Verde, Comores, Îles Cook, Côte d'Ivoire, Gabon, Gambie, Kiribati, Liberia, Madagascar, Maurice et São Tomé-et-Príncipe), l'utilisation du budget s'est concentrée sur les activités contribuant à cible 14.4 de l'ODD (réglementer les prélèvements et mettre fin à la surpêche et à la pêche INN), tandis que des budgets importants ont été alloués en appui de la cible 14.b de l'ODD (accès aux marchés) dans le cadre des "grands APPDs" (Mauritanie, Maroc et Seychelles). Les budgets de l'appui sectoriel consacrés à l'ODD 14.a (accroître les connaissances scientifiques) ont représenté une part importante (au moins 15 %) de la contribution de l'UE au Cabo Verde, en Côte d'Ivoire, au Groenland, en Guinée-Bissau, à Maurice, au Maroc et au Sénégal.
- 14. Globalement, 48% de la contribution de l'UE pour le soutien sectoriel mis en œuvre dans le cadre du SFPAS entre 2015 et 2020 a été utilisée pour soutenir les autorités publiques des pays tiers partenaires dans la mise en œuvre de leurs tâches** (28% bénéficiant aux autorités de gestion et 20% aux instituts de recherche), **et 52% a été utilisée pour soutenir des investissements publics bénéficiant au secteur de la pêche** (19% pour les opérateurs des secteurs de la

pêche et de l'aquaculture, y compris la transformation, et 33% pour les communautés de pêche artisanale). L'équilibre entre les deux types de bénéficiaires a varié en fonction du contexte et du pays tiers partenaire, la majorité de la contribution de l'UE au soutien sectoriel ayant été utilisée pour soutenir des interventions publiques en faveur du secteur privé dans le cadre des APPDs conclus avec Kiribati, la Gambie, la Mauritanie, le Maroc et les Seychelles.

- 15. Le renforcement des capacités des autorités publiques des pays tiers partenaires en matière de suivi, de contrôle et de surveillance des activités de pêche, ainsi que de recherche scientifique, ont été les priorités des programmes d'appui sectoriel mis en œuvre dans la quasi-totalité des pays tiers partenaires** entre 2015 et 2020. Les activités mises en œuvre avec la contribution de l'UE pour le soutien sectoriel comprenaient notamment : la modernisation des Centres de Surveillance des Pêches des pays tiers partenaires par l'acquisition de matériel et de logiciels permettant de surveiller la position des navires de pêche par satellite (système de surveillance des navires) et de recevoir des déclarations électroniques de capture (système de déclaration électronique) ; le renforcement du cadre juridique ; l'équipement et le soutien pour la réalisation de patrouilles et d'enquêtes de recherche scientifique en mer ; et le soutien à la conception et à la mise en œuvre de systèmes de collecte de données scientifiques. D'autres initiatives mises en œuvre avec la contribution financière de l'UE pour le soutien sectoriel contribuant au renforcement des capacités des autorités de gestion comprenaient le soutien à l'identification et à la mise en œuvre de mesures nationales de gestion de la pêche (par exemple Îles Cook, Comores, Côte d'Ivoire, Gambie, Guinée Bissau, Groenland, Kiribati, Mauritanie, Maroc, Seychelles) et le soutien au paiement des contributions obligatoires dues par les pays tiers partenaires aux organisations internationales de pêche concernées (par exemple, Cabo Verde, Côte d'Ivoire, Guinée Bissau, Liberia, Sénégal, São Tomé-et-Príncipe).
- 16. La contribution de l'UE à l'appui sectoriel a été utilisée pour soutenir des interventions publiques bénéficiant directement au secteur de la pêche dans les pays tiers partenaires**, conformément aux priorités nationales, et notamment au secteur artisanal (33 % de la contribution totale de l'UE). Les principales activités bénéficiant au secteur de la pêche ont été le développement d'infrastructures (Guinée Bissau, Maroc, Mauritanie, Sénégal et Seychelles) qui a absorbé 24% de la contribution totale de l'UE pour l'appui sectoriel, l'amélioration des conditions sur les sites de débarquement existants (stockage et transformation des produits artisanaux à Cabo Verde, Côte d'Ivoire, Gambie, Guinée Bissau, Maroc, Sénégal et Seychelles), la sécurité en mer (fourniture d'équipements de sécurité aux pêcheurs artisanaux à Cabo Verde, aux Comores, aux îles Cook, à la Guinée Bissau, à Madagascar et au Sénégal), et le soutien à la formation professionnelle pour attirer et améliorer les compétences professionnelles des travailleurs du secteur de la pêche (Guinée Bissau, Mauritanie, Maroc et Seychelles). Certains pays tiers partenaires ont utilisé l'appui sectoriel pour développer des incitations (prêts, subventions) à la modernisation ou à l'adaptation des flottes artisanales (par exemple, les îles Cook, la Côte d'Ivoire, Maurice, São Tomé-et-Príncipe, les Seychelles).

PRINCIPALES CONCLUSIONS DE L'ÉVALUATION

Pertinence : la mesure dans laquelle les APPDs étaient (encore) pertinents pour répondre aux besoins.

17. L'évaluation de la pertinence des APP a confirmé que les APPDs constituaient un cadre adéquat pour satisfaire :
- les **besoins et les objectifs de la Politique Commune de la Pêche de l'UE** dans les eaux externes, grâce à l'identification et au suivi des modalités d'accès des navires de l'UE dans des conditions garantissant la durabilité de leurs opérations de

- pêche, conformément aux normes de la politique commune de la pêche et aux obligations de l'UE découlant des instruments internationaux pertinents ;
- les **besoins des pays tiers partenaires** en termes i) de bénéfices financiers générés par un excédent de leurs stocks et/ou par leur position géographique sur les voies de migration des espèces hautement migratoires et ii) d'établissement d'un partenariat avec un financement spécifique pour le renforcement de leur cadre de gouvernance de la pêche et le développement durable de leurs secteurs de la pêche ; et
 - **les besoins de la flotte de pêche lointaine de l'UE et de certains segments de la flotte artisanale de l'UE** en termes d'accès aux zones de pêche productives dans les eaux externes, et l'établissement de conditions de concurrence équitables entre les opérateurs de l'UE et les autres opérateurs étrangers.

Le découplage de la contribution de l'UE pour l'accès et de la contribution de l'UE pour l'appui sectoriel était pertinent pour faciliter la gestion séparée des deux composantes par les parties du fait de leurs natures différentes.

18. Toutefois, l'évaluation a révélé que la pertinence des APPDs était diminuée par i) **l'existence d'APPDs dormants** qui empêchent les navires de l'UE d'accéder aux eaux des pays tiers partenaires pendant des périodes pluriannuelles, alors que, dans le même temps, leurs concurrents étrangers pouvaient accéder aux zones de pêche, et ii) **la proportionnalité entre la contribution de l'UE à l'accès et la contribution de l'UE à l'appui sectoriel**, qui limite la pertinence des APPDs pour répondre aux besoins des pays tiers partenaires, en particulier des Pays les Moins Avancés et des Petits États Insulaires en Développement.

Efficacité : la mesure dans laquelle les APPDs ont réussi à atteindre leurs objectifs.

19. L'approche suivie dans le cadre des APPDs multi-espèces pour adapter les possibilités de pêche de l'UE d'un protocole à l'autre ou pendant leur mise en œuvre, a été efficace pour adapter la pression de pêche de l'UE sur certains stocks clés en Afrique de l'Ouest évalués comme surexploités (petits pélagiques, céphalopodes). L'approche a produit des résultats positifs pour certains stocks désormais exploités dans des limites de la durabilité, mais n'a pas toujours été efficace pour assurer la conservation des stocks pour lesquels le cadre de gestion mis en œuvre par le pays tiers partenaire n'était pas suffisant pour empêcher une pression de pêche accrue de la part des flottes nationales ou d'autres flottes étrangères. Toutefois, l'excédent des ressources s'est avéré difficile à identifier en raison de l'insuffisance des informations scientifiques. **Dans le cas des APPDs thoniers, les APPDs ont été efficaces** en assurant que les mesures de conservation et de gestion adoptées dans le cadre multilatéral des organisations régionales de gestion des pêches (ORGP) étaient également appliquées dans les eaux des pays tiers partenaires.

20. La mise en œuvre d'une approche écosystémique de la gestion des pêches dans le cadre des APPDs multi-espèces n'a été que peu efficace. Bien que la question ait été inscrite à l'ordre du jour des différents comités scientifiques conjoints, le manque d'informations scientifiques pertinentes a empêché l'identification de mesures visant à réduire les niveaux de captures indésirables, à éviter les interactions avec les espèces protégées et à atténuer les impacts potentiellement négatifs des engins de pêche sur les fonds marins, y compris sur les écosystèmes marins vulnérables. En revanche, les APPDs thoniers ont été efficaces pour assurer l'application des mesures écosystémiques adoptées par les ORGPs concernées dans les eaux des pays tiers partenaires, certains APPDs étant parvenus à imposer des mesures écosystémiques plus strictes (Cabo Verde, Gambie, Seychelles).

21. **Dans l'ensemble, les APPDs ont permis de renforcer les capacités des pays tiers partenaires à surveiller et à contrôler les activités de pêche** relevant de leur responsabilité, **avec une contribution positive à la lutte globale contre la pêche INN**. Les principaux avantages des interventions de l'UE dans le cadre des APPDs ont été : i) l'identification et la mise en œuvre de **mesures pour le suivi conjoint des navires de l'UE** opérant dans le cadre des APPDs ; et ii) la mise en œuvre d'une part importante de la contribution de l'UE à l'appui sectoriel pour **améliorer les capacités techniques et humaines des Centres de Surveillance des Pêches** des pays tiers partenaires, pour renforcer le cadre juridique et pour contribuer au déploiement des patrouilles de surveillance. Toutefois, les effets à long terme des interventions ne sont pas clairs, notamment en raison du manque d'informations sur la mesure dans laquelle les dispositions en matière de surveillance et de contrôle imposées aux navires de l'UE ont été étendues à d'autres flottes, et sur les impacts de la contribution de l'UE à l'appui sectoriel utilisée pour contribuer aux frais de fonctionnement des autorités de contrôle dans les pays tiers partenaires. En outre, l'évaluation a relevé un manque de consistance dans les dispositions relatives à l'échange d'informations électroniques pour la surveillance des navires de l'UE (systèmes de surveillance des navires, systèmes de notification électroniques) sous les différents protocoles.
22. **Les APPDs ont permis de soutenir efficacement le développement des capacités scientifiques dans les pays tiers partenaires**. Par le biais des mesures de suivi mises en œuvre sous le volet accès, les APPDs ont permis de collecter des informations sur les activités des navires de l'UE dans les eaux des pays tiers partenaires, qui sont utilisées par les comités scientifiques conjoints pour suivre l'abondance des ressources, et ont favorisé la participation des ressortissants des pays tiers partenaires aux travaux scientifiques (observateurs scientifiques, analyses dans le cadre des Comités Scientifiques Conjoints). Les APPDs ont également contribué au renforcement des capacités de recherche par l'utilisation de la contribution financière de l'UE pour l'appui sectoriel pour la modernisation des installations de recherche et la mise en œuvre de systèmes de collecte de données (campagnes scientifiques, enquêtes, échantillonnage des captures) à l'appui de la gestion du secteur de la pêche. Pour certains pays tiers partenaires (par exemple, la Guinée-Bissau, la Mauritanie, le Maroc et les Seychelles), **des preuves démontrent que les informations scientifiques générées par les interventions dans le cadre de la composante de soutien sectoriel des APPDs ont été utilisées par les autorités nationales de gestion** pour la conception de plans de gestion des pêcheries. Cependant, l'efficacité des APPDs a été entravée par les difficultés de certains pays partenaires à maintenir une réserve suffisante de personnel scientifique qualifié.
23. **Les interventions de l'UE dans le cadre du volet accès des APPDs ont contribué efficacement au maintien ou à la création de près de 20 000 emplois pour les ressortissants des pays tiers et à la création d'une valeur ajoutée économique annuelle moyenne de 477 millions d'euros**. Toutefois, les avantages socio-économiques tirés par les pays tiers des activités des navires de l'UE dans le cadre des APPDs ont été répartis de manière inégale, les avantages étant plus importants pour les pays tiers partenaires qui étaient en mesure d'offrir des conditions attractives pour les interactions entre leurs secteurs de la pêche et les flottes de l'UE. Bien que nécessitant une mise à jour selon les partenaires sociaux de l'UE, la clause sociale incluse dans tous les APPDs a permis de garantir des conditions de travail décentes aux ressortissants des pays tiers employés à bord des navires de l'UE, comme en témoignent les réactions reçues lors des consultations ciblées, à l'exception des niveaux des salaires qui, selon certains syndicats, pourraient être inférieur aux normes internationales dans certains cas.
24. **Les interventions de l'UE par le biais du volet appui sectoriel des APPDs ont été efficaces pour soutenir le développement social et économique du secteur**

de la pêche, et en particulier du secteur artisanal dans les pays tiers partenaires. Les activités mises en œuvre se sont concentrées sur le développement des infrastructures, l'amélioration des conditions sur les sites de débarquement, la sécurité en mer et la formation professionnelle, en fonction des besoins contextuels identifiés et des budgets disponibles. S'il est difficile d'évaluer pleinement l'impact des différentes interventions en raison du manque d'informations sur les effets à long terme des différentes activités incluses dans les programmes pluriannuels, les éléments disponibles auprès de certains pays tiers partenaires suggèrent que c'était globalement le cas. L'utilisation des contributions de l'UE pour maintenir ou obtenir l'autorisation d'exporter des produits de la pêche vers l'UE a été globalement efficace dans les contextes où les conditions sanitaires ont été retenues par les deux parties dans les priorités des programmes pluriannuels.

- 25. Les APPDs ont été globalement efficaces pour soutenir les activités d'une moyenne annuelle de 211 navires de pêche de l'UE entre 2015 et 2020, représentant 19 % de la capacité de pêche totale de l'UE exprimée en tonnage (GT) et 6 % de sa capacité de pêche totale exprimée en puissance (kW).** Les APPDs ont fourni un cadre efficace pour soutenir la durabilité économique de la flotte extérieure de l'UE, avec des effets positifs en termes d'emploi de 3 600 ressortissants des États membres de l'UE en moyenne annuelle. Selon les opérateurs européens concernés, l'efficacité des interventions de l'UE par le biais des APPDs pourrait être encore améliorée en : i) concluant de nouveaux APPDs avec les pays tiers dont les eaux présentent un intérêt pour eux ; et ii) en traitant le cas des APPDs dormants sans protocole d'application, qui ont des effets négatifs sur leurs stratégies de déploiement et sur l'établissement de conditions de concurrence équitables avec leurs concurrents étrangers dans les eaux externes.

Efficiences : les relations entre les ressources utilisées par les APPDs et les résultats de l'intervention.

- 26. La mesure dans laquelle les possibilités de pêche négociées étaient proportionnées aux intérêts de la flotte de l'UE depuis 2015 a été variable** comme le révèle l'examen du taux d'utilisation de ces possibilités de pêche par les navires de l'UE. Des efforts continus ont été déployés depuis le début des années 2000 pour adapter les possibilités de pêche d'un protocole à l'autre en tenant compte de l'utilisation des possibilités de pêche disponibles, ainsi que d'autres facteurs tels que les objectifs de conservation, notamment dans le cas des APPDs thoniers. Dans le cas des APPDs multi-espèces, il y a moins de signes d'adaptations d'un protocole à l'autre pour adapter les possibilités de pêche sous-utilisées, sauf dans le cas des possibilités de pêche pour les petits pélagiques en Mauritanie qui ont été réduites de moitié entre 2006 et 2015. Malgré cette constatation, la composante accès des APPDs s'est néanmoins traduite par un rapport coût-bénéfice positif pour l'investissement de l'UE. Le rapport coût-bénéfice était généralement plus élevé pour les APPDs thoniers que pour les APPDs multi-espèces, suggérant pour premier cas un meilleur ajustement de la contribution financière de l'UE à la valeur des espèces exploitées, et/ou de meilleures performances en termes d'utilisation des possibilités de pêche négociées. L'évaluation a révélé que les APPDs ne contenaient pas de dispositions adéquates pour l'adaptation de la contribution financière de l'UE à l'accès lorsqu'un niveau réduit d'exploitation des possibilités de pêche est établi, et que tous les APPDs ne prévoyaient pas de dispositions pour l'adaptation de la contribution financière de l'UE pour l'accès à la suite de changements substantiels de la politique nationale affectant les dispositions pertinentes des protocoles.

- 27. La contribution de l'UE au soutien sectoriel a généralement été alignée sur la capacité d'absorption des pays tiers partenaires,** comme en témoignent les paiements généralement complets de la contribution de l'UE à l'appui sectoriel identifiés par les APPDs au cours des périodes couvertes par les protocoles. Lorsque ce n'était

pas le cas, les APPDs ont pris des mesures d'adaptation de la contribution de l'UE pour le soutien sectoriel d'un protocole à l'autre, ou des dispositions spécifiques pour garantir l'utilisation de la contribution de l'UE identifiée dans le cadre d'un protocole précédent avant de libérer la contribution de l'UE identifiée dans le cadre du protocole en cours. **Toutefois, un examen de la mise en œuvre des différents APPDs a montré que les règles de paiement détaillées dans les lignes directrices de mise en œuvre volontaire n'ont pas permis de garantir la mise en œuvre technique complète des programmes pluriannuels** convenus au cours des périodes couvertes par les protocoles, ce qui a eu pour conséquence que certaines activités ont été entièrement payées avant l'expiration des protocoles pour une mise en œuvre ultérieure. Cela a également généré une incertitude quant aux dispositions juridiques régissant le suivi de ces activités. Cette situation pourrait être attribuée à la flexibilité des conditions prévues par les APPDs pour les dégagelements en cas de retard dans la mise en œuvre technique jusqu'à un passé récent. En outre, l'évaluation a révélé que la compétence juridique de la partie européenne pour exercer des contrôles financiers sur l'utilisation de la contribution de l'UE à l'appui sectoriel par les pays tiers partenaires n'est pas claire. La Commission européenne a évalué la mesure dans laquelle la gestion des finances publiques des pays tiers partenaires était suffisamment transparente, fiable et efficace pour garantir l'utilisation de la contribution de l'UE à l'appui sectoriel pour les pays tiers partenaires ayant un ou plusieurs contrats d'appui budgétaire mis en œuvre dans le cadre du programme de coopération de l'UE.

Cohérence : la mesure dans laquelle les interventions au titre des APPDs s'intègrent avec d'autres interventions.

28. Les interventions de l'UE par le biais des APPDs ont été cohérentes avec les autres interventions de l'UE dans le cadre de la Politique Commune de la Pêche. Les APPDs ont soutenu de manière cohérente les activités de l'UE dans le cadre des organisations internationales en alignant les règles d'accès sur les mesures de conservation et de gestion adoptées par les ORGPs, avec un effet de levier potentiel sur d'autres flottes grâce à l'application attendue de la clause de non-discrimination. La contribution de l'UE au soutien sectoriel dans le cadre des APPDs a contribué à renforcer les capacités des pays tiers partenaires à se conformer à leurs obligations internationales, notamment dans l'océan Indien. La clause relative à la coopération régionale récemment introduite dans un APPDs (Seychelles) a renforcé le rôle des APPDs dans le soutien à la coopération internationale. **Les interventions de l'UE par le biais des APPDs ont soutenu de manière cohérente la mise en œuvre du Règlement INN** par le biais du renforcement des capacités des autorités des pays tiers partenaires en matière de suivi, de contrôle et de surveillance, et ont accompagné de manière cohérente l'approche de tolérance zéro promue par l'UE par le biais de la propre initiative de la Commission européenne consistant à s'abstenir de négocier des APPDs avec les pays tiers qui n'ont pas corrigé les manquements qui leur ont été notifiés dans le cadre des procédures de pré-notification INN.

29. Les APPDs ont soutenu de manière cohérente la mise en œuvre du programme de Gouvernance Internationale des Océans de l'UE et de sa stratégie "de la Ferme à la Table" en favorisant l'exploitation durable des stocks commerciaux relevant du champ d'application des APPDs. Toutefois, les APPDs ont moins bien réussi à contribuer aux objectifs de ces politiques globales en ce qui concerne la protection des écosystèmes marins et pour inciter les pays tiers partenaires à ratifier les instruments internationaux régissant la formation et les conditions de travail dans le secteur de la pêche. À la fin de 2020, les APPDs avaient eu relativement peu d'interventions dans les secteurs de l'économie bleue en dehors des secteurs traditionnels de la pêche et de l'aquaculture. Toutefois, les APPDs sont un instrument de mise en œuvre de la Politique Commune de la Pêche de l'UE et, doivent à ce titre se concentrer sur les mesures relevant du champ d'application de cette politique.

30. **Les interventions de l'UE dans le cadre des APPDs ont été cohérentes avec les interventions de l'UE dans le domaine du développement.** L'évaluation a identifié de nombreux exemples de **synergies** entre les activités mises en œuvre dans le cadre du volet de soutien sectoriel des APPDs et les activités mises en œuvre aux niveaux national et régional dans le cadre des programmes de coopération pertinents de l'UE. Il existe également des exemples de **complémentarités** lorsque les programmes de coopération de l'UE ont abordé des domaines qui n'étaient pas inclus dans le champ d'application des programmes de soutien sectoriel des APPDs en raison des budgets disponibles et/ou des priorités choisies, et vice-versa. En outre, toutes les Délégations de l'UE consultées au cours de l'évaluation ont confirmé que la présence d'un APPD dans le portefeuille d'activités de l'UE dans les pays tiers partenaires était utile pour inclure la pêche dans le champ du dialogue politique lors de l'examen de questions transversales telles que la gouvernance, l'environnement et la croissance économique. La cohérence a été assurée par des consultations ad hoc régulières. Cependant, plusieurs délégations de l'UE ont noté qu'il n'y avait pas de mécanismes formels établis pour ces consultations.
31. **Les APPDs ont soutenu de manière cohérente l'agenda commerce de l'UE pour certains pays tiers par des activités dans le cadre du volet de soutien sectoriel visant à faciliter le commerce,** telles que des interventions visant à maintenir ou à obtenir les autorisations sanitaires d'exportation de produits de la pêche vers l'UE, et des interventions soutenant le développement et la modernisation des sites de débarquement du poisson favorisant l'accès aux marchés. Le cadre des APPDs a fourni un outil permettant de contribuer à l'établissement de conditions de concurrence équitables entre les flottes de pêche européennes et étrangères approvisionnant le marché de l'UE pour les activités de pêche relevant du champ d'application des APPDs, grâce à l'application prévue de la clause de non-discrimination.

Valeur ajoutée de l'UE : valeur ajoutée résultant de l'intervention de l'UE par le biais des APPDs.

32. **Les interventions de l'UE par le biais des APPDs ont apporté une valeur ajoutée par rapport à ce qui aurait pu être obtenu par d'autres moyens,** en notant que la négociation et la mise en œuvre des accords de pêche publics relèvent de la compétence exclusive de l'UE, conformément au Traité sur le Fonctionnement de l'UE. Les APPDs ont créé un cadre juridique pluriannuel robuste régissant les activités des navires de l'UE dans les eaux des pays tiers partenaires, avec un instrument financier dédié pour mettre en œuvre un partenariat entre l'UE et les pays tiers afin de soutenir la mise en œuvre d'une politique de pêche durable et de favoriser le développement économique et social de leurs secteurs de la pêche.

Acceptabilité : la perception des interventions dans le cadre des APP par les parties prenantes ciblées et/ou par le grand public

33. **La perception du public à l'égard des APPDs est restée largement axée sur leur volet accès, les réactions reçues au cours de l'évaluation suggérant des niveaux d'acceptabilité mitigés de la part de la société civile** dans les pays tiers partenaires. La contribution positive des activités mises en œuvre dans le cadre du volet appui sectoriel des APPDs est souvent largement méconnue des bénéficiaires ciblés et de la société civile dans l'UE et dans les pays tiers partenaires. **Les réactions à la consultation ciblée menée dans le cadre de l'évaluation ont confirmé une demande quasi unanime des parties prenantes en faveur d'une plus grande transparence dans la mise en œuvre des volets accès et soutien sectoriel des APPDs,** afin d'étayer un débat public éclairé et de renforcer la responsabilité des deux parties. La Commission européenne a clairement identifié le besoin de plans de communication et de visibilité adéquats pour améliorer la sensibilisation du public aux

activités financées par la contribution de l'UE au soutien sectoriel, avec des mesures pertinentes introduites dans le cadre de certains protocoles récemment négociés.

CONCLUSION

34. La conclusion générale de l'évaluation est que les APPDs sont adaptés à leur finalité en ce qui concerne leur contribution aux objectifs suivants : i) contribuer à la conservation des ressources et à la durabilité environnementale par une exploitation rationnelle et durable des ressources marines vivantes des eaux des pays tiers partenaires ; ii) contribuer à la poursuite des activités des flottes de pêche de l'UE opérant dans les eaux extérieures, et à l'emploi lié à ces flottes ; et iii) soutenir le développement d'un secteur de la pêche durable dans les pays tiers partenaires.

35. L'appréciation globalement positive des performances des APPDs est étayée par les principales conclusions suivantes de l'évaluation :

- Les APPDs ont fourni un outil pertinent pour répondre aux besoins et aux objectifs des différentes entités concernées (l'UE, les armateurs de navires de pêche de l'UE et les pays tiers partenaires). Le découplage de la contribution de l'UE pour l'accès et de la contribution de l'UE pour le soutien sectoriel était pertinent pour assurer la gestion séparée des deux composantes.
- Identification et adaptation au fil du temps des possibilités de pêche pour les navires de l'UE sur la base d'avis scientifiques, sous la supervision de Comités Scientifiques Conjoints indépendants spécialisés dans le cadre des APPDs multi-espèces.
- Alignement des conditions d'accès sur les mesures de conservation et de gestion adoptées par les organisations régionales de gestion des pêches concernées dans le cadre des APPDs thoniers.
- Dispositions proportionnées dans les APPDs pour rendre obligatoire ou encourager les interactions économiques directes entre la flotte de pêche de l'UE et le secteur de la pêche des pays tiers partenaires.
- Contributions positives des APPDs au renforcement des capacités des pays tiers partenaires en matière de suivi, de contrôle et de surveillance, à la mise en œuvre d'activités de recherche en l'appui de la gestion de la pêche, et à la promotion du développement social et économique du secteur de la pêche dans les pays tiers partenaires le cas échéant.
- Amélioration de l'alignement des possibilités de pêche négociées sur les besoins réels de la flotte de pêche de l'UE d'un protocole à l'autre, en particulier pour les APPDs thoniers.
- Alignement satisfaisant de la contribution de l'UE au soutien sectoriel sur la capacité d'absorption des pays tiers partenaires, avec des mesures appropriées pour adapter les paiements lorsque ce n'était pas le cas.
- Bonne cohérence entre les interventions déployées dans le cadre des APPDs et les interventions déployées dans le cadre des initiatives de coopération de l'UE, comme en témoignent les complémentarités et les synergies obtenues.
- Une valeur ajoutée claire des interventions de l'UE par le biais des APPDs par rapport à ce qui pourrait être réalisé par d'autres moyens.

36. Toutefois, l'évaluation a identifié certains domaines dans lesquels les performances de l'instrument pourraient être améliorées, notamment en ce qui concerne la mise en œuvre. Les principaux domaines d'action et d'amélioration suggérés sont les suivants :

- Prise en compte accrue du statut de développement du pays tiers partenaire lors de la détermination de la contribution financière de l'UE pour le soutien sectoriel.
- Révision des APPDs dormants et examen de la manière de traiter l'interruption des activités de pêche imposée par la clause d'exclusivité.

- Amélioration du suivi par les Commissions Mixtes de l'application de la clause de non-discrimination et de la clause de transparence par les pays tiers partenaires. Cela garantirait l'extension des normes de la Politique Commune de la Pêche imposées aux navires de l'UE par les APPDs aux autres flottes de pêche ayant accès aux eaux des pays tiers partenaires.
- Renforcement des contributions scientifiques à la conception des mesures écosystémiques et à l'identification formelle des excédents dans le cadre des APPDs multi-espèces.
- Harmonisation des modèles régissant l'échange électronique d'informations de suivi des navires de pêche entre les États membres de l'UE et les pays tiers partenaires.
- Mise à jour de la clause sociale régissant les conditions de travail à bord des navires de l'UE afin de mieux refléter les normes internationales applicables, et identification de mécanismes pour contrôler leur mise en œuvre.
- Intégration de dispositions dans les APPDs permettant d'adapter la compensation financière de l'UE pour l'accès en cas de faible utilisation des possibilités de pêche et/ou lorsque l'évolution des conditions techniques a une incidence sur la capacité opérationnelle de la flotte de l'UE à exploiter les possibilités de pêche obtenues.
- Accent accru sur l'évaluation des réalisations techniques et opérationnelles résultant de la mise en œuvre au fil du temps de la contribution de l'UE au soutien sectoriel.
- Établissement de compétences juridiques claires pour la partie européenne afin de vérifier, le cas échéant, les dépenses déclarées par les pays tiers partenaires concernant l'utilisation de la contribution financière de l'UE pour l'appui sectoriel.
- Définition de mécanismes interne de coordination entre les services concernés de la Commission européenne pour conforter la cohérence entre les APPDs et les autres interventions de l'UE affectant les pays tiers partenaires.
- Considération de l'introduction d'une clause dans les APPDs encourageant les pays tiers partenaires à s'abstenir d'accorder des autorisations de pêche aux navires de pêche battant pavillon d'un pays tiers identifié par l'UE comme ne coopérant pas à la lutte contre la pêche illicite, non déclarée et non réglementée.
- Amélioration de la transparence publique et de la communication sur les résultats et les impacts de la mise en œuvre des composantes accès et appui sectoriel des APPDs.

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RESUMEN

- 1. Los Acuerdos de Colaboración de Pesca Sostenible (ACPS) son acuerdos internacionales celebrados con un tercer Estado con el fin de obtener acceso a los recursos o a las aguas** y explotar de forma sostenible una parte del excedente de recursos biológicos marinos, a cambio de una compensación financiera de la Unión, que incluye apoyo sectorial. Hay dos tipos principales de ACPS que permiten a los buques pesqueros de la UE acceder a las aguas de terceros países socios: los ACPS que otorgan acceso para explotar gran variedad de poblaciones de especies pesqueras (los llamados ACPS «mixtos») y los ACPS que dan acceso a recursos de especies altamente migratorias (los llamados ACPS «atuneros»).
- 2. En diciembre de 2020 había trece ACPS con protocolos de aplicación vigentes**, cuatro de los cuales eran ACPS mixtos (Groenlandia, Mauritania, Marruecos y Guinea-Bissau) y nueve ACPS atuneros (Cabo Verde, Islas Cook, Costa de Marfil, Gambia, Liberia, Mauricio, Santo Tomé y Príncipe, Senegal y Seychelles), con permisos extra en los casos de Gambia y Senegal para explotar de modo limitado especies demersales. Había además otros siete ACPS considerados «durmientes», pues carecían de protocolos de aplicación vigentes (Guinea Ecuatorial, Gabón hasta 2021¹¹, Kiribati, Micronesia, Madagascar, Mozambique y las Islas Salomón).
- 3. Entre 2015 y 2020 los compromisos de la UE con los terceros países asociados totalizaron, de media anual, 159 millones de euros, de los que 126 millones de euros fueron con cargo al presupuesto público de la UE** (98 millones de euros en concepto de contrapartida por el acceso y 28 millones de euros para el apoyo sectorial) y **los armadores de los buques de la UE** que se beneficiaron de las posibilidades negociadas de pesca costearon **33 millones de euros**. Un 90 % de esta contribución de la UE fue para los ACPS mixtos celebrados con Guinea-Bissau, Groenlandia, Mauritania y Marruecos.
- 4. Entre 2015 y 2020 cada año hubo una media de 211 buques de la UE con pabellón de trece de sus Estados miembros** que aprovecharon las posibilidades negociadas de pesca para capturar cerca de 300 000 toneladas de productos pesqueros, de los cuales el 49 % fueron pequeños pelágicos y el 39 % especies altamente migratorias. Las actividades de la flota de la UE que operó en el marco de los ACPS proporcionaron anualmente empleo directo para una media de 3650 ciudadanos de la UE y 2650 ciudadanos de terceros países, además de generar una media de 15 000 empleos anuales en el sector de la transformación de los productos de la pesca, 9000 de ellos para mujeres. Los terceros países asociados que generaron condiciones favorables de interacción entre las flotas de la UE y su sector pesquero obtuvieron beneficios económicos y sociales adicionales de las actividades de los buques de la UE que operaron dentro del marco de los ACPS.
- 5. El enfoque contemplado en los ACPS mixtos para adaptar las posibilidades de pesca de la UE de un protocolo a otro, o durante su aplicación, ha resultado eficaz para adaptar la presión de la UE sobre ciertas poblaciones pesqueras estratégicas de África Occidental** evaluadas en estado de sobreexplotación (pequeños pelágicos, cefalópodos). Este enfoque ha logrado resultados positivos en ciertas poblaciones que actualmente se explotan dentro de sus límites de sostenibilidad, pero no ha conseguido garantizar la conservación de aquellas poblaciones para las que el tercer país asociado aplicó medidas de gestión inadecuadas para impedir que aumentara la presión pesquera ejercida sobre ellas por sus flotas nacionales o de otros países extranjeros. **Los ACPS atuneros** resultaron eficaces para garantizar que también se aplicaran en aguas de los terceros

¹¹ El ACPS con Gabón se activó en 2021 tras la entrada en vigor el 29 de junio de 2021 de un nuevo Protocolo de cinco años de duración.

- países asociados las medidas de conservación y gestión adoptadas en el marco multilateral de las organizaciones regionales de ordenación pesquera (OROP).
6. **La contribución de la UE al apoyo sectorial fue de unos 200 millones de euros, canalizados entre 2015 y 2020 a través de los presupuestos de los terceros países socios para contribuir al cumplimiento del Objetivo de Desarrollo Sostenible número 14 de Naciones Unidas**, y en concreto al cumplimiento de sus metas 14.b (acceso de los pescadores artesanales a los recursos marinos y los mercados), 14.4 (reglamentar eficazmente la pesquería y poner fin a la sobrepesca y la pesca INDNR) y 14.a (aumentar los conocimientos científicos). La evaluación ha confirmado que las intervenciones de la UE dentro del marco de los ACPS son coherentes con el resto de actuaciones de la UE en el sector pesquero de los terceros países gracias al desarrollo de programas a escala nacional o regional, con **numerosos ejemplos de sinergias y complementariedades entre distintas intervenciones de la UE**.
 7. **Las actuaciones dentro del componente de apoyo sectorial de los ACPS contribuyeron a reforzar la lucha de los terceros países asociados contra la pesca INDNR y mejoraron sus capacidades de investigación científica**. Los ACPS contribuyeron a mejorar las capacidades de los terceros países para el seguimiento, el control y la vigilancia, gracias principalmente a: 1) la modernización de los Centros de Seguimiento de la Pesca en los países asociados gracias al suministro de material y programas informáticos que permiten geolocalizar los buques de pesca (Sistema de Localización de Buques vía satélite) y recibir telemáticamente las declaraciones de captura (Sistema Electrónico de Comunicación de Información); 2) el fortalecimiento del marco jurídico, y 3) el equipamiento y apoyo para llevar a cabo patrullas de vigilancia. **Respecto a la investigación científica**, los ACPS han apoyado la realización de campañas oceanográficas y los programas de recopilación de datos cuyos resultados han sido directamente aprovechados por los terceros países socios para diseñar sus planes de gestión pesquera. El programa de apoyo sectorial ha reforzado asimismo la capacidad de los terceros países socios para conservar u obtener el visto bueno de las autoridades sanitarias de la UE para exportar sus productos de la pesca y la acuicultura a la UE, así como para crear y gestionar zonas marinas protegidas.
 8. **Otras actividades realizadas dentro del componente de apoyo sectorial de los ACPS han fomentado la inversión pública en beneficio directo de los operadores del sector pesquero de los terceros países asociados, sobre todo del sector artesanal**. Dependiendo del contexto y del presupuesto disponible, la contribución de la UE al apoyo sectorial se ha empleado para desarrollar las infraestructuras (lugares de desembarque, plantas de transformación, infraestructuras sociales); modernizar los puntos de desembarque existentes y mejorar las condiciones de mantenimiento y transformación de las capturas desembarcadas; mejorar la seguridad marítima (capacidades de búsqueda y rescate, equipos de salvamento para la flota artesanal) y hacer atrayente la formación profesional para mejorar la competencia profesional de los trabajadores del sector pesquero; así como para poner en marcha programas nacionales dirigidos a incentivar la modernización o la adaptación de la flota artesanal.
 9. **La conclusión global de la evaluación es que los ACPS están concebidos para cumplir con los siguientes objetivos**: 1) contribuir a la conservación de los recursos y a la sostenibilidad medioambiental gracias a una explotación razonada y sostenible de los recursos marinos vivos en aguas de los terceros países asociados; 2) contribuir al mantenimiento de las actividades pesqueras de la flota de la UE en aguas exteriores y de los empleos que generan, y 3) apoyar el desarrollo de un sector pesquero sostenible en los terceros países asociados. **Sin embargo, la evaluación de este instrumento ha identificado algunos ámbitos donde es necesario mejorar sus resultados, sobre todo en lo referido a su ejecución**.

RESUMEN EJECUTIVO

CONTEXTO DE LA EVALUACIÓN

- 1. Los Acuerdos de Colaboración de Pesca Sostenible (ACPS) son acuerdos internacionales celebrados con un tercer Estado con el fin de obtener acceso a los recursos o a las aguas** y explotar de forma sostenible una parte del excedente de recursos biológicos marinos, a cambio de una compensación financiera de la Unión, que incluye un componente de apoyo sectorial. Hay dos tipos principales de ACPS que permiten a los buques pesqueros de la UE acceder a las aguas de terceros países asociados: los ACPS que otorgan acceso para explotar gran variedad de poblaciones de especies pesqueras (los llamados ACPS «mixtos») y los ACPS que dan acceso a recursos de especies altamente migratorias (los llamados ACPS «atuneros»).
- 2. La evaluación de las intervenciones de la UE en el marco de los ACPS se llevó a cabo de acuerdo con las directivas de la UE para la mejora de la legislación.** La metodología de la evaluación incluyó la recopilación de datos y la búsqueda documental de informes y bases de datos disponibles, consultas específicamente dirigidas a las partes interesadas de la UE y los terceros países asociados, así como una consulta pública. Esta se lanzó entre marzo y junio de 2021 a través del sitio web de consultas de la Comisión Europea¹². La evaluación se ha concentrado en el periodo 2015-2020, pero cuando ha sido necesario se han tenido en cuenta periodos previos.
- 3. El objetivo general de los ACPS es garantizar que las actividades pesqueras en aguas de los terceros países asociados se lleven a cabo cumpliendo con las obligaciones internacionales de la UE, así como con los objetivos y principios de su Política Pesquera Común.** Los objetivos específicos de los ACPS son: 1) contribuir a la conservación y a la explotación sostenible de los recursos biológicos marinos en aguas de los terceros países asociados; 2) contribuir a la protección de la flota de la UE en aguas exteriores, así como de los empleos que genera, y 3) apoyar el desarrollo de un sector pesquero sostenible en los terceros países.
- 4. Los ACPS constan de dos componentes: un componente de acceso,** que define las condiciones técnicas y financieras que rigen el acceso de los buques pesqueros de la UE a las aguas de los terceros países asociados, **y un componente de apoyo sectorial,** que define el alcance y los principios rectores del uso de la contribución de la UE para poner en marcha una política sectorial pesquera en el tercer país socio. Las contribuciones de la UE dedicadas a los pagos por derecho de acceso y al apoyo sectorial están disociadas, de modo que se hallan sujetas a reglas de pago distintas.
- 5. Cuatro principios clave son los que, regulados mediante cláusulas específicas en todos los ACPS, respaldan sus marcos de gobernanza: los derechos humanos y el respeto de los principios democráticos** como elementos esenciales de los ACPS; la **no discriminación** que prohíbe otorgar mejores condiciones a otras flotas que las concedidas a los operadores de la UE; la **transparencia** que garantiza la disponibilidad de información relevante sobre los acuerdos que dan acceso a otras flotas, y la **exclusividad** que prohíbe a los buques de pesca de la UE faenar en aguas del tercer país asociado sin estar en posesión de una autorización de pesca expedida con arreglo a las disposiciones negociadas en el ACPS.
- 6. En diciembre de 2020 había trece ACPS con protocolos de aplicación vigentes,** incluyendo cuatro ACPS mixtos (Groenlandia, Mauritania, Marruecos y Guinea-Bissau) y nueve ACPS atuneros (Cabo Verde, Islas Cook, Costa de Marfil, Gambia, Liberia, Mauricio, Santo Tomé y Príncipe, Senegal y Seychelles). En los casos de Gambia y

¹² <https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/12728-Fisheries-evaluation-of-the-EU%E2%80%99s-sustainable-fisheries-partnership-agreements-SFPAs- en>

Senegal existen posibilidades de pesca adicionales para explotar de modo limitado poblaciones de especies demersales. Había además otros siete ACPS considerados «durmientes» en ausencia de protocolos de aplicación vigentes (Guinea Ecuatorial, Gabón hasta 2021¹³, Kiribati, Micronesia, Madagascar, Mozambique y las Islas Salomón). La siguiente tabla muestra las contribuciones públicas de la UE comprometidas en los trece ACPS con protocolos de aplicación vigentes en diciembre de 2020.

Los trece ACPS con protocolos de aplicación vigentes en diciembre de 2020

Tercer Estado asociado	Fecha de entrada en vigor del ACPS	Fecha de inicio del protocolo	Fecha de fin del protocolo	Contribución anual de la UE para el acceso (EUR)	Contribución anual de la UE para el apoyo sectorial (EUR)	Contribución total anual de la UE (EUR)
Groenlandia	01/01/2013	01/01/2016	31/12/2020	13 168 978	2 931 000	16 099 978
Marruecos	18/07/2019	18/07/2019	17/07/2023	19 100 000	17 900 000	37 000 000
Cabo Verde	20/03/2007	20/05/2019	19/05/2024	400 000	350 000	750 000
Mauritania	30/11/2006	16/11/2015	15/11/2021	57 500 000**	4 125 000	61 625 000
Senegal	20/11/2014	18/11/2019	17/11/2024	800 000	900 000	1 700 000
Gambia	31/07/2019	31/07/2019	30/07/2025	275 000	275 000	550 000
Guinea Bissau	16/06/2007	15/06/2019	14/06/2024	11 600 000	4 000 000	15 600 000
Costa de Marfil	01/07/2007	01/08/2018	31/07/2024	330 000	352 000	682 000
Liberia	09/12/2015	09/12/2015	08/12/2020	357 000	357 000	714 000
Santo Tomé y Príncipe	01/06/2006	19/12/2019	18/12/2024	400 000	440 000	840 000
Mauricio	28/01/2014	08/12/2017	07/12/2021	220 000	355 000	575 000
Seychelles	24/02/2020	24/02/2020	23/02/2026	2 500 000	2 800 000	5 300 000
Islas Cook	14/10/2016	14/10/2016	13/11/2021	385 000	350 000	735 000

Fuente: DG MARE

Nota: * las contribuciones de la UE de la tabla son para el primer año de los protocolos. Para algunos protocolos, estas cantidades pueden aumentar o disminuir con el tiempo.

** A partir de 2017, tras introducirse una nueva categoría de pesca en el ACPS

7. **Los compromisos financieros de la UE con los terceros países asociados totalizaron entre 2015 y 2020 una media anual de 159 millones de euros, de los que 126 millones fueron con cargo al presupuesto público de la UE** (98 millones de euros para el pago por derechos de acceso y 28 millones de euros para el apoyo sectorial) y 33 millones de euros costeados por los armadores de los buques de la UE que se beneficiaron de las posibilidades negociadas de pesca. Un 90 % de las contribuciones públicas de la UE se destinaron a los cuatro países asociados firmantes de ACPS mixtos. En comparación, el resto de terceros países asociados recibió ayudas públicas de la UE de menor nivel (un 1 % o menos), excepto en el caso de Seychelles (un 4 %). Por región, los fondos públicos de la UE comprometidos en el marco de los ACPS, se destinaron en un 81 % al Atlántico Centro Oriental (África Occidental), cerca de un 23 % a Groenlandia, un 6 % a los terceros países asociados del océano Índico, y un 0,7 % a los países asociados del océano Pacífico.
8. **Entre 2015 y 2020, cada año una media de 211 buques pesqueros de la UE se beneficiaron de las posibilidades de pesca negociadas en los ACPS.** La flota pesquera de la UE con acceso a las aguas de terceros países asociados estuvo compuesta tanto grandes buques para la pesca de altura (por ejemplo, arrastreros

¹³ El ACPS con Gabón volvió a estar active en 2021, después de la aprobación de un nuevo Protocolo el 29 de junio de 2021 por un periodo de cinco años.

demersales y de pequeños pelágicos, atuneros cerqueros y palangreros de superficie), como pequeñas embarcaciones de pesca artesanal con puertos base en regiones de la UE adyacentes a las aguas de terceros países asociados, lo que comprende las regiones ultraperiféricas de España (Islas Canarias) y Francia (islas de La Reunión y Mayotte). La flota pesquera de la UE que se ha beneficiado de las posibilidades de pesca contempladas en los ACPS representa el 0,3 % del número total de buques de pesca de la UE para todos sus Estados miembros, lo que supone un 19 % de la capacidad pesquera de la flota de la UE en arqueo bruto (TAB), y un 6 % de su potencia en kilowatios (kW). Los buques pesqueros que aprovecharon las posibilidades de pesca disponibles entre 2015 y 2020 arbolaban pabellón de 13 Estados miembros diferentes de la UE¹⁴. Dentro de la flota pesquera de la UE que operó en el marco de los ACPS, los pesqueros españoles representaron el 66 % en número y el 33 % en términos de capacidad pesquera total en TRB.

9. **Las capturas de la UE en aguas de los terceros países asociados alcanzaron una media anual de 300 000 toneladas** entre 2015 y 2020, de las cuales el 49 % en peso fueron de pequeños pelágicos, el 39 % de especies altamente migratorias, el 10 % de otras especies de pescado (sobre todo merluza) y el 2 % de crustáceos. **En primera venta, el valor anual medio de estas capturas ascendió a 410 millones de euros.** La captura total de la UE dentro del marco de los ACPS representó el 9 % de la captura media total de la UE, contribuyendo así al 21 % de las capturas de la UE de especies altamente migratorias y al 8 % de pequeños pelágicos. La mayoría de la captura de los buques de la UE en el marco de los ACPS se destina al mercado interior de la UE. Cubren el 3 % de las necesidades del mercado de la UE en productos pesqueros, siendo de un 6 % para las especies altamente migratorias y de un 7 % para los pequeños pelágicos. Se estima que la captura de la UE suministra anualmente 27 000 toneladas a los mercados nacionales de los terceros países asociados, gracias sobre todo a la venta de capturas accesorias de los atuneros de la UE y al desembarco de capturas como contrapartida por acceso a las aguas de Mauritania y Guinea-Bissau en ciertas categorías de arrastreros de la UE.
10. **Se estima que las actividades de los buques de la UE emplean anualmente, de media, a 6500 personas, de las cuales 3650 son ciudadanas de la UE y 2850 de terceros países.** La mayoría de los ACPS obligan a emplear a un número o porcentaje determinado de ciudadanos de los terceros países asociados o de países de África Caribe y Pacífico (países ACP). En general, aunque existen excepciones, los operadores de los buques de la UE suelen cumplir estas estipulaciones, e incluso superarlas. Las condiciones laborales a bordo de los buques pesqueros de la UE se rigen por la normativa internacional adoptada por la Organización Internacional del Trabajo, conforme a las disposiciones pertinentes de los ACPS. Los niveles mínimos de formación profesional son los que establece el Convenio adoptado por la Organización Marítima Internacional, ratificado por los principales Estados miembros de la UE implicados en los ACPS¹⁵. Además, se estima que las actividades de los buques de la UE generaron una media anual de 15 000 empleos en el sector de la transformación de los productos de la pesca en los terceros países asociados, 9000 de ellos para mujeres.
11. **Algunos de los terceros países asociados han obtenido cuantiosos beneficios económicos adicionales de las actividades de los buques pesqueros de la UE gracias al suministro de bienes y servicios a la flota de la UE, al empleo de marineros a bordo y a la transformación de las capturas en tierra.** Estos beneficios fueron para aquellos países asociados (p. ej., Marruecos, Mauritania, Cabo

¹⁴ Por orden alfabético: Alemania, Dinamarca, España, Estonia, Francia, Grecia, Italia, Letonia, Lituania, Países Bajos, Polonia y Reino Unido.

¹⁵ Convenio Internacional sobre Normas de Formación, Titulación y Guardia para el personal de los buques pesqueros (STCW-F) de la Organización Marítima Internacional, ratificado, entre otros países, por Dinamarca, Francia, Letonia, Lituania, Países Bajos, Polonia, Portugal y España (situación a finales de 2020)

Verde, Senegal y Costa de Marfil en el océano Atlántico; Madagascar, Mauricio y Seychelles en el océano Índico; y Kiribati en el océano Pacífico) que fueron capaces de generar condiciones favorables de interacción con las flotas de la UE, como por ejemplo, puertos para buques de gran calado o plantas de transformación de productos de la pesca que cumplen con las normas de seguridad alimentaria de la UE. Por el contrario, los terceros países que no fueron capaces de ofrecer este tipo de condiciones favorables tuvieron poca o ninguna interacción con la flota de la UE (Gabón, Guinea-Bissau, Liberia y Santo Tomé y Príncipe en el océano Atlántico, y las Comoras en el océano Índico). Los ACPS han favorecido la creación de un valor económico añadido anual medio, directo e indirecto, de 477 millones de euros, de los que un 52 % ha beneficiado a los terceros países asociados. Los ACPS incluían disposiciones proporcionadas y adaptadas a cada situación, cuyo objeto era obligar o fomentar las interacciones entre la flota de la UE y de los terceros países.

12. **La contribución de la UE al apoyo sectorial busca respaldar las prioridades identificadas por ambas partes, de acuerdo con las políticas pesqueras nacionales de los terceros países asociados y la Política Pesquera Común de la UE.** En cada ACPS, los Comités Mixtos adoptaron un programa plurianual que cubría toda la duración del Protocolo, donde se identificaban tanto las distintas actividades y proyectos, como sus presupuestos asociados, con vistas a cumplir los objetivos definidos por las prioridades establecidas por ambas partes. De acuerdo con las disposiciones de los protocolos, corresponde a las Comisiones Mixtas la evaluación anual del grado de consecución de los objetivos. Se basan para ello en informes elaborados por los terceros países asociados, de modo que el pago de la correspondiente contribución anual de la UE al apoyo sectorial queda condicionado a los resultados obtenidos por el tercer país socio. La UE tiene derecho a suspender parcial o totalmente estos pagos si los resultados no cumplen con los objetivos pactados en el programa plurianual (algo que ya ha ocurrido). Las modalidades de aplicación de la contribución de la UE al apoyo sectorial suelen estar definidas por directrices voluntarias adoptadas en el marco de los Comités Mixtos, excepto en el caso del ACPS celebrado con Mauritania, cuyas modalidades de aplicación quedaron reflejadas en un anexo a los Protocolos aplicados desde 2012.
13. **La contribución de la UE al apoyo sectorial fue de unos 200 millones de euros, canalizados entre 2015 y 2020 a través de los presupuestos de los terceros países asociados para contribuir al cumplimiento del Objetivo de Desarrollo Sostenible número 14 de Naciones Unidas,** y en concreto al cumplimiento de sus metas 14.b (acceso de los pescadores artesanales a los recursos marinos y los mercados), 14.4 (reglamentar eficazmente la pesquería y poner fin a la sobrepesca y la pesca INDNR) y 14.a (aumentar los conocimientos científicos). La contribución financiera de la UE se ha orientado de distinto modo según los contextos: en la mayoría de los «pequeños ACPS» desde el punto de vista financiero (Cabo Verde, las Comoras, Islas Cook, Costa de Marfil, Gabón, Kiribati, Liberia, Madagascar, Mauricio, Santo Tomé y Príncipe y Gambia), el presupuesto se usó preferentemente para actuaciones dentro de la componente de apoyo sectorial relativas a la meta 14.4 de los ODS (reglamentar eficazmente la pesquería y acabar con la sobrepesca y la pesca INDNR), mientras que en los «grandes ACPS» (Mauritania, Marruecos y Seychelles) se otorgaron presupuestos importantes en apoyo del ODS 14.b (acceso de los pescadores artesanales a los recursos marinos y los mercados). La cuota de los presupuestos de la UE de la componente de apoyo sectorial enfocada a la consecución de la meta 14.a de los ODS (aumentar los conocimientos científicos) fue importante (al menos un 15 %) en Cabo Verde, Costa de Marfil, Groenlandia, Guinea-Bissau, Mauricio y Senegal.
14. **En conjunto, el 48 % de la contribución para el apoyo sectorial contemplada en el marco de los ACPS entre 2015 y 2020 respaldó las acciones de las instituciones públicas de los terceros países asociados en favor de la realización de sus tareas** (el 28 % para las instituciones gestoras y el 20 % para los

institutos de investigación), **y el 52 % se empleó en apoyo de las inversiones públicas realizadas en el sector pesquero** (un 19 % para los operadores de los sectores de la pesca y la acuicultura, incluyendo las operaciones de transformación, y un 33 % para la pesca artesanal). El equilibrio entre ambos tipos de beneficiarios fue variable según el contexto y el país socio, con predominio de la contribución de la UE dedicada al apoyo sectorial para respaldar las inversiones públicas a favor del sector privado en los ACPS celebrados con Kiribati, Gambia, Mauritania, Marruecos y Seychelles.

15. Entre 2015 y 2020, **los principales objetivos de los programas de apoyo sectorial llevados a cabo en casi todos los países asociados se enfocaron al fortalecimiento de la capacidad de sus autoridades públicas, tanto para efectuar el seguimiento, control y vigilancia de las actividades pesqueras, como para la investigación científica.** Las actividades realizadas con la componente de apoyo sectorial de la contribución de la UE incluyeron, entre otras: la modernización de los Centros de Seguimiento de la Pesca en los países asociados, gracias al suministro de material y programas informáticos que permiten geolocalizar los buques de pesca (Sistema de Localización de Buques vía satélite) y recibir telemáticamente las declaraciones de captura (Sistema Electrónico de Comunicación de Información); el fortalecimiento del marco jurídico, del equipamiento y del apoyo para llevar a cabo patrullas de vigilancia; y el apoyo para diseñar e implementar programas de recopilación de datos científicos. Otras iniciativas, llevadas a cabo gracias a la contribución financiera del apoyo sectorial de la UE, se dirigieron a reforzar las competencias de las autoridades en materia de gestión, respaldaron la identificación y la puesta en marcha de medidas nacionales de gestión pesquera (por ejemplo, en las Islas Cook, las Comoras, Costa de Marfil, Gambia, Guinea-Bissau, Groenlandia, Kiribati, Mauritania, Marruecos y Seychelles), y financiaron las cuotas obligatorias debidas por los terceros países asociados a importantes organizaciones pesqueras internacionales (por ejemplo, Cabo Verde, Costa de Marfil, Guinea-Bissau, Liberia, Senegal, Santo Tomé y Príncipe).
16. **La contribución de la UE al apoyo sectorial se empleó para respaldar intervenciones públicas que beneficiaron directamente al sector pesquero en los terceros países asociados,** de acuerdo con sus prioridades nacionales, y muy enfocadas a las comunidades de pesca artesanal (33 % de la contribución total de la UE). Las principales actividades llevadas a cabo en beneficio del sector pesquero han dedicado un 24 % del total del apoyo sectorial de la UE para desarrollar las infraestructuras (Guinea-Bissau, Marruecos, Mauritania, Senegal y Seychelles); mejorar las condiciones en lugares de desembarco (almacenamiento y transformación de productos artesanales en Cabo Verde, Costa de Marfil, Gambia, Guinea-Bissau, Marruecos, Senegal y Seychelles); mejorar la seguridad marítima (suministro de equipos de salvamento para la flota artesanal de Cabo Verde, las Comoras, Islas Cook, Guinea-Bissau, Madagascar y Senegal), y hacer que la formación profesional sea atrayente y mejore la competencia profesional de los trabajadores del sector pesquero (Guinea Bissau, Mauritania, Marruecos y Seychelles). Algunos terceros países han empleado el apoyo sectorial para incentivar (con préstamos, becas) la modernización o la adaptación de sus flotas artesanales (por ejemplo, Islas Cook, Costa de Marfil, Santo Tomé y Príncipe, Seychelles).

PRINCIPALES CONCLUSIONES DE LA EVALUACIÓN

Pertinencia: mide si los ACPS siguieron siendo adecuados para responder a las necesidades.

17. **La evaluación de la pertinencia de los ACPS ha confirmado que proporcionan un marco adecuado para satisfacer:**

- las **necesidades y objetivos de la Política Pesquera Común (PPC)** de modo que el acceso a los recursos de la flota de la UE en aguas exteriores obedezca a principios y normas de acceso que aseguren la sostenibilidad de unas prácticas pesqueras respetuosas con las normas de la Política Pesquera Común y de cuantas obligaciones emanen de reglamentos internacionales pertinentes;
- **las necesidades del tercer país asociado**, en términos de 1) generación de beneficios económicos gracias sus recursos excedentarios o por su localización geográfica en las rutas de especies altamente migratorias, y 2) establecimiento de una dotación presupuestaria para fortalecer su marco de gobernanza en materia pesquera y garantizar el desarrollo sostenible de su sector pesquero;
- **la necesidad para la flota de larga distancia de la UE y para ciertos segmentos de la flota artesanal de la UE** de acceder a zonas pesqueras productivas en aguas exteriores a la UE, asegurándose de crear condiciones de competencia equitativa entre los operadores de la UE y de otros países extranjeros.

La disociación de la contribución de la UE por el acceso y de la contribución para el apoyo sectorial ha sido importante para facilitar que las partes implicadas manejen de modo diferenciado dos componentes bien distintos.

18. **Sin embargo, la evaluación encontró que la pertinencia de los ACPS se redujo debido a** 1) la existencia de ACPS durmientes que impidieron, durante períodos de varios años, que la flota de la UE accediera a aguas de terceros países asociados, mientras que sus competidores extranjeros gozaban de acceso a la pesquería, y a 2) **la proporcionalidad en las contribuciones de la UE para el acceso y el apoyo sectorial**, que ha limitado el alcance de los ACPS respecto a la consecución de los objetivos de los terceros países asociados, sobre todo para los Países Menos Adelantados y los Pequeños Estados Insulares en Desarrollo.

Eficacia: mide si los ACPS lograron cumplir sus objetivos.

19. **El enfoque del marco de los ACPS mixtos para adaptar las posibilidades de pesca de la UE de un protocolo a otro, o durante su aplicación, ha resultado eficaz para adaptar la presión pesquera de la UE sobre ciertas poblaciones pesqueras estratégicas de África Occidental** evaluadas en estado de sobreexplotación (pequeños pelágicos, cefalópodos). Este enfoque arrojó resultados positivos para ciertas poblaciones que actualmente se explotan dentro de sus límites de sostenibilidad, pero no siempre consiguió garantizar la conservación de aquellas poblaciones gestionadas por el tercer país socio con medidas que resultaron inadecuadas para impedir que aumentara la presión pesquera ejercida por sus flotas nacionales o de otros países extranjeros. Sin embargo, ha resultado difícil determinar los recursos excedentarios cuando los datos científicos son insuficientes. **Los ACPS atuneros lograron garantizar** que también se aplicaran en aguas de los terceros países asociados las medidas de conservación y gestión adoptadas en el marco multilateral de las organizaciones regionales de ordenación pesquera (OROP).

20. **La adopción del enfoque ecosistémico para gestionar las pesquerías dentro del marco de los ACPS mixtos no ha resultado lo suficientemente eficaz.** Aunque esta cuestión ha estado en el orden del día de los distintos Comités Científicos Mixtos, la falta de datos científicos apropiados ha impedido establecer medidas que reduzcan las capturas no deseadas, eviten las interacciones con especies protegidas y mitiguen los eventuales impactos negativos de los artes de pesca sobre fondos marinos, como los de ecosistemas marinos vulnerables. Por el contrario, **los ACPS atuneros resultaron eficaces para garantizar que las medidas ecosistémicas** adoptadas por las correspondientes OROP se aplicaran en aguas de los terceros países asociados, con algunos ACPS que han logrado, incluso, imponer medidas ecosistémicas más restrictivas (Cabo Verde, Gambia, Seychelles).

- 21. Los ACPS han servido globalmente para reforzar las capacidades de seguimiento y control de la actividad pesquera de los terceros países asociados** en aguas bajo su soberanía, **y han arrojado resultados positivos en la lucha generalizada contra la pesca INDNR.** Los principales beneficios de las actuaciones de la UE dentro del marco de los ACPS son: 1) haber identificado y aplicado **medidas para la gestión conjunta de los buques de la UE** que operan dentro del marco de los ACPS; y 2) haber destinado una parte significativa de la contribución de la UE al apoyo sectorial para **reforzar las capacidades técnicas y humanas de los Centros de Seguimiento de la Pesca** en los terceros países asociados, fortalecer su marco jurídico y contribuir al despliegue de patrullas de vigilancia. A pesar de ello, los efectos a largo plazo de estas intervenciones no están claros, sobre todo cuando falta información acerca de la extensión al resto de flotas de las medidas de seguimiento y control impuestas a la flota de la UE, así como sobre el impacto del apoyo sectorial de la UE empleado por los terceros países para sufragar los costes de funcionamiento de sus autoridades de control. La evaluación ha identificado además una falta de coherencia en las disposiciones para el intercambio electrónico de información que permite el seguimiento de la flota de la UE (Sistemas de Localización de Buques, Sistemas Electrónicos de Comunicación de Información) entre los distintos protocolos.
- 22. Los ACPS han mejorado el desarrollo de las competencias en investigación científica de los terceros países asociados.** Gracias a las medidas de seguimiento contempladas en las condiciones de acceso, los ACPS han fomentado la recopilación de datos de la pesquería relativos a las actividades de los buques de la UE en aguas de terceros países asociados, para que los Comités Científicos Mixtos puedan llevar a cabo el seguimiento de la abundancia de sus recursos. Han fomentado así mismo la implicación de los terceros países en el trabajo científico (por ejemplo, observadores científicos, análisis conjuntos con ocasión de los Comités Científicos Mixtos). Los ACPS también han reforzado las capacidades de investigación gracias a la contribución financiera de apoyo sectorial de la UE dedicada a modernizar las infraestructuras para la investigación y a poner en marcha programas de recopilación de datos (campañas oceanográficas, muestreo de capturas) que fundamenten la gestión de la actividad pesquera. **Se ha comprobado que los datos científicos recogidos gracias a las actuaciones financiadas por el apoyo sectorial de los ACPS han sido los empleados por las autoridades nacionales de algunos países asociados** (como Guinea-Bissau, Mauritania, Marruecos y Seychelles) para diseñar sus planes de gestión pesquera. A pesar todo, algunos países asociados siguen teniendo dificultades para mantener operativa una plantilla científica cualificada, lo que limita la eficacia de los ACPS.
- 23. Gracias los cánones de acceso que paga la UE, los ACPS han contribuido a que se mantengan o creen cerca de 20 000 empleos para los ciudadanos de los terceros países, y han generado un valor económico añadido medio anual de 477 millones de euros.** Sin embargo, los beneficios socioeconómicos que los terceros países han obtenido de las actividades de la flota de la UE en el marco de los ACPS son muy desiguales, con beneficios mayores para aquellos terceros países asociados que fueron capaces de generar condiciones favorables de interacción entre su sector pesquero y las flotas de la UE. A pesar de que los interlocutores sociales de la UE la consideran desfasada, la serie de encuestas dirigidas a las partes interesadas ha mostrado que la cláusula social incluida en todos los ACPS ha garantizado unas condiciones de trabajo decentes para los marineros de terceros países embarcados en buques de la UE, excepto en lo referente al nivel de los salarios, que en ciertos casos y para algunos sindicatos, estarían por debajo de lo fijado por la normativa internacional.
- 24. Las intervenciones de la UE gracias al componente sectorial de los ACPS han sido eficaces para fomentar en los terceros países asociados el desarrollo socioeconómico de su sector pesquero, y principalmente del artesanal.** Las

actividades realizadas se centraron en desarrollar infraestructuras, mejorar los lugares de desembarque, la seguridad marítima y la formación profesional en función de las necesidades contextuales identificadas y de los presupuestos disponibles. Aunque resulta difícil evaluar el impacto de las distintas acciones contempladas en los programas plurianuales porque se desconocen sus efectos a largo plazo, los elementos aportados por algunos de los países socios parecen indicar que, en general, fueron eficaces. Globalmente, el uso que hacen los terceros países asociados de las contribuciones de la UE para conservar u obtener la autorización de exportar sus productos pesqueros hacia la UE ha sido eficaz en aquellos contextos en los que ambas partes consensuaron las disposiciones sanitarias como parte de las prioridades de los programas plurianuales.

25. **En general, entre 2015 y 2020 los ACPS respaldaron eficazmente las actividades pesqueras anuales de la media de 211 buques de la UE, lo que representó el 19 % de la capacidad pesquera total de la UE en arqueo bruto (TAB) y el 6 % en potencia (kW).** Los ACPS han supuesto un marco eficaz para apoyar la sostenibilidad económica de la flota de la UE en aguas exteriores, y sus efectos positivos se han traducido, en términos laborales, en empleo medio anual para 3600 ciudadanos de Estados miembros de la UE. Según los operadores más destacados de la UE, podría mejorarse la eficacia de las actuaciones de la Unión a través de los ACPS si: 1) se establecen nuevos ACPS con terceros países cuyas aguas tienen interés para ellos; y 2) se resuelven los casos de ACPS durmientes, o sin protocolo de aplicación vigente, que penalizan las estrategias de despliegue de la flota europea y suponen un agravio comparativo frente a las flotas extranjeras competidoras en aguas exteriores.

Eficiencia: evalúa la relación entre los recursos empleados por los ACPS y los resultados de sus actuaciones

26. **La proporcionalidad entre las posibilidades negociadas de pesca y los intereses de la flota de la UE ha variado desde 2015,** como demuestra el análisis de los porcentajes de uso de estas posibilidades de pesca por parte de los buques de la UE. Desde principios de los años 2000 se están haciendo esfuerzos continuados para adaptar las posibilidades de pesca entre un protocolo y el siguiente, teniendo en cuenta tanto el uso de estas posibilidades como otros factores, entre los que cabe citar los objetivos de conservación de los recursos, sobre todo en el caso de ACPS atuneros. En el caso de los ACPS mixtos, no están tan claras las adaptaciones entre protocolos sucesivos para aprovechar las posibilidades de pesca infrautilizadas, excepto en el caso de las posibilidades de pesca de pequeños pelágicos en Mauritania, cuyas poblaciones se redujeron a la mitad entre 2006 y 2015. A pesar de esta circunstancia, la inversión de la UE en la contrapartida financiera para el acceso de los ACPS ha arrojado un resultado positivo en términos de coste-beneficio. En general, esta razón coste-beneficio ha sido mayor para los ACPS atuneros que para los ACPS mixtos, lo que sugiere que los primeros ajustan mejor los costes de acceso respecto al valor de las especies que explotan, o que sacan mejor rendimiento de las posibilidades de pesca negociadas. La evaluación ha mostrado que no existen disposiciones adecuadas en los ACPS para adaptar la contribución financiera que la UE paga por el acceso en caso de que se demuestre una reducción del nivel de explotación, y que tampoco todos los ACPS incorporan una disposición que permita adaptar esta contrapartida financiera de la UE en caso de que cambie de modo sustancial la política que afecta a disposiciones relevantes de los protocolos.

27. **La contribución de la UE para el apoyo sectorial estuvo generalmente en línea con el índice de absorción de los terceros países asociados,** como demuestran los pagos, generalmente completos dentro de los periodos estipulados en los protocolos, de la contribución de la UE para el apoyo sectorial en los ACPS. En los casos en los que no fue así, los ACPS contemplaron adaptar la contribución de la UE para el apoyo sectorial entre protocolos sucesivos, o se adoptaron disposiciones específicas

que garantizaran el uso de la contribución de la UE correspondiente al protocolo previo, antes de abonar la contribución de la UE correspondiente al protocolo en vigor. **Sin embargo, al revisar la aplicación de los distintos ACPS, se observa que las condiciones de pago establecidas en las directrices voluntarias no han logrado garantizar la ejecución completa de los programas plurianuales** consensuados para los periodos de aplicación de los protocolos, y se pagaron en su totalidad ciertas actividades pendientes de ejecución antes de que expiraran los protocolos, en espera de su posterior finalización. Esto ha generado incertidumbre en cuanto a las disposiciones jurídicas que rigen el seguimiento de la ejecución de esas actividades. Quizá esta situación se deba a la flexibilidad que hasta hace poco existía en las condiciones de desistimiento previstas en caso de retraso en la ejecución técnica. Además, la evaluación ha mostrado que la competencia jurídica de la UE para verificar el uso dado a la contribución financiera que los terceros países asociados reciben del componente de apoyo sectorial de la UE no es lo suficientemente clara. La Comisión Europea ha evaluado en qué medida es transparente, fiable y eficaz la gestión que hacen los terceros países de la contribución que reciben de la UE para garantizar que esta se destine al apoyo sectorial en los terceros países asociados con los que la UE celebra uno o más contratos de apoyo presupuestario en el marco de su programa de cooperación.

Coherencia: mide si las actuaciones de los ACPS pueden integrarse con otras

- 28. Las actuaciones de la UE a través de los ACPS fueron coherentes con el resto de intervenciones de la Unión previstas en la Política Pesquera Común. Las ACPS han apoyado de forma coherente las actuaciones de la UE en el seno de los organismos internacionales** supeditando las condiciones de acceso a las medidas de conservación y gestión adoptadas por los OROP, con eventuales efectos positivos sobre el resto de flotas, en virtud de la aplicación de la cláusula de no discriminación. En los ACPS, la contrapartida de apoyo sectorial de la UE ha contribuido a que los terceros países asociados cumplan con sus obligaciones internacionales, sobre todo en el océano Índico. La cláusula de cooperación regional recientemente introducida en un ACPS (Seychelles) ha reforzado el papel que juegan los ACPS en apoyo de la cooperación internacional. **Las actuaciones de la UE a través de los ACPS han apoyado de modo coherente la aplicación del Reglamento INDNR**, gracias al fortalecimiento de las capacidades de seguimiento, control y vigilancia de los poderes públicos de los terceros países, y han sido coherentes en su apoyo a la política de tolerancia cero promovida por la UE a iniciativa de la propia Comisión Europea, que impide negociar ACPS con terceros países que no hayan atendido las amonestaciones recibidas dentro del protocolo notificación previa por pesca INDNR.
- 29. Los ACPS apoyaron de modo coherente la aplicación del programa de la UE para la gobernanza internacional de los océanos, así como de su estrategia «De la granja a la mesa»**, a través de la promoción de la explotación sostenible de las poblaciones comerciales reguladas por estos ACPS. Sin embargo, los ACPS no fueron demasiado eficaces incentivando políticas globales de protección de los ecosistemas marinos, ni promoviendo la ratificación en los terceros países asociados de disposiciones internacionales que regulan las condiciones de formación y trabajo en el sector pesquero. A finales de 2020, los ACPS habían intervenido relativamente poco en sectores de la economía azul que no fueran los tradicionales de la pesca y la acuicultura. Sin embargo, los ACPS son un instrumento de la Política Pesquera Común y, como tales, deben centrarse en las medidas de su ámbito de aplicación.
- 30. Las actuaciones de la UE a través de los ACPS han sido coherentes con la promoción de actuaciones europeas en favor del desarrollo.** La evaluación identificó numerosos ejemplos de sinergias entre las actividades puestas en marcha gracias al apoyo sectorial de los ACPS y las actividades llevadas a cabo tanto a escala nacional como regional en importantes programas de cooperación de la UE. También

hay ejemplos de complementariedad en los programas de cooperación de la UE en áreas que quedaron fuera del alcance de los programas de apoyo sectorial de los ACPS por motivos presupuestarios o de priorización, y viceversa. Todas las delegaciones de la UE consultadas durante la evaluación han confirmado además que la existencia de un ACPS dentro del conjunto de actividades de la UE en el tercer país socio hizo más fácil abordar los temas pesqueros inscribiéndolos en un diálogo político sobre temas transversales como la gobernanza, el medioambiente y el crecimiento económico. La frecuente realización de consultas específicas garantizó esta coherencia. Sin embargo, varias delegaciones de la UE han apuntado que no existen mecanismos formales establecidos para llevar a cabo estas consultas.

31. **Los ACPS apoyaron de modo coherente la agenda comercial de la UE con algunos de los terceros países asociados, a través de las actuaciones previstas en la ayuda sectorial orientada a promover el comercio**, como algunas dirigidas a mantener u obtener autorización para exportar productos de la pesca hacia la UE y otras intervenciones para desarrollar y mejorar los puntos de desembarque de capturas. Gracias a la aplicación de la cláusula de no discriminación, los ACPS han resultado ser una herramienta que ha contribuido a establecer un marco de competencia equitativa entre las flotas pesqueras de la UE y las extranjeras que abastecen el mercado europeo, y cuyas actividades pesqueras se hallan dentro del ámbito de aplicación de los ACPS.

Valor añadido de la UE: el valor que aportan las actuaciones de la UE gracias a los ACPS

32. **Las actuaciones de la UE han generado valor añadido gracias a los ACPS en comparación con el que se hubiera logrado por otros medios**, teniendo en cuenta que la negociación y la aplicación de los acuerdos públicos de pesca son competencia exclusiva de la UE, conforme a lo establecido en el Tratamiento de Funcionamiento de la Unión. Los ACPS han creado un sólido marco jurídico plurianual que rige las actividades de los buques de la UE en aguas de los terceros países asociados, y están dotados con un instrumento financiero propio de colaboración entre la UE y sus socios, enfocado a poner en marcha una política pesquera sostenible que fomente el desarrollo económico y social del sector pesquero en los terceros países.

Aceptabilidad: evalúa cómo perciben las partes interesadas o el gran público las actuaciones llevadas a cabo en el marco de los ACPS

33. **La percepción que tiene el público de los ACPS ha permanecido muy centrada en su componente de acceso, con respuestas a la evaluación que sugieren cierta disparidad en la aceptabilidad que percibe la sociedad civil** de los terceros países asociados. Tanto los beneficiarios a los que se dirigen las ayudas, como la sociedad civil de la UE y de los terceros países asociados suelen desconocer, en gran medida, el efecto positivo de las actividades llevadas a cabo dentro del componente de apoyo sectorial de los ACPS. **Las respuestas recibidas a la encuesta específica de evaluación han confirmado la petición casi unánime de las partes interesadas de que mejore la transparencia** en la ejecución de los componentes de acceso y ayuda sectorial de los ACPS, fomentando un debate público de calidad que refuerce la responsabilidad de ambas partes. La Comisión Europea ve necesario elaborar un buen plan de comunicación y campañas de sensibilización que mejoren la percepción pública de las actuaciones del apoyo sectorial financiadas por la UE, con importantes medidas introducidas en el marco de algunos protocolos recientemente renegociados.

CONCLUSIÓN

34. **La conclusión general de la evaluación es que los ACPS están bien diseñados para lograr los siguientes objetivos:** 1) Contribuir a la conservación de los recursos y

la sostenibilidad medioambiental gracias a una explotación racional y sostenible de los recursos marinos vivos en aguas de los terceros países asociados; 2) contribuir a la continuidad de la actividad de las flotas pesqueras de la UE que operan en aguas exteriores, así como mantener el entramado de empleo que sustentan; y 3) apoyar el desarrollo de un sector pesquero sostenible en los terceros países asociados.

35. Los siguientes puntos clave de la evaluación son los que refuerzan la valoración globalmente positiva de los resultados de los ACPS:

- Los ACPS son una herramienta importante para atender las necesidades y objetivos de las distintas partes implicadas (la UE, los armadores de los buques pesqueros de la UE y los terceros países asociados). La disociación de las contrapartidas financieras de la UE abonadas para el acceso por un lado, y destinadas al apoyo sectorial por otro, ha sido importante para manejar de modo independiente ambas contribuciones.
- En los ACPS mixtos ha sido posible identificar las posibilidades de pesca para los buques de la UE, y adaptarlas en función de las recomendaciones científicas dictadas por los Comités Científicos Mixtos especializados e independientes.
- En los ACPS atuneros se han supeditado las condiciones de acceso a las medidas de conservación y gestión adoptadas por las Organizaciones Regionales de Ordenación Pesquera competentes.
- Las disposiciones proporcionadas y adaptadas a cada situación de los ACPS para obligar o fomentar las interacciones entre la flota de la UE y el sector pesquero de los terceros países asociados.
- Los ACPS han contribuido positivamente al fortalecimiento de las capacidades de seguimiento, control y vigilancia en los países asociados, han apoyado la investigación científica en la que basar la gestión de sus pesquerías, y han promovido el desarrollo social y económico de su sector pesquero en su justa medida.
- Conviene supeditar mejor las posibilidades de pesca negociadas con las necesidades reales de la flota de la UE entre un protocolo y el siguiente, sobre todo en el caso de los túnidos.
- Supeditar satisfactoriamente la contribución de la UE dedicada al apoyo sectorial al índice de absorción de los terceros países asociados, con medidas adecuadas para adaptar los pagos cuando esto no ocurre.
- Buena coherencia entre aquellas intervenciones desplegadas en el seno de los ACPS y las desplegadas por otras iniciativas de la UE en materia de cooperación, como demuestran las complementariedades y sinergias conseguidas.
- Las actuaciones de la UE a través de los ACPS han generado un claro valor añadido en comparación con lo que se hubiera logrado por otros medios.

36. Sin embargo, la evaluación de este instrumento ha identificado algunos ámbitos donde es necesario mejorar sus resultados, sobre todo en lo referido a su ejecución. Las principales sugerencias en lo que respecta a ámbitos de actuación y mejora son:

- Tener más en cuenta el nivel de desarrollo del tercer país socio en el momento de establecer la contribución financiera de la UE para el apoyo sectorial.
- Revisar los ACPS durmientes y reflexionar acerca de cómo resolver la interrupción de las actividades pesqueras impuestas por la cláusula de exclusividad.
- Mejorar el seguimiento que hacen los Comités Mixtos de la aplicación que realizan los terceros países asociados de la cláusula de no discriminación y del modo en que fomentan la cláusula de transparencia. Esto garantizará que las normas de la Política Pesquera Común impuesta a los buques de la UE a través de los ACPS se extienda al resto de flotas con acceso a las aguas de los terceros países asociados

- Reforzar el trabajo científico que permita diseñar medidas ecosistémicas e identificar con rigor los recursos excedentarios dentro del marco de los ACPS mixtos.
- Armonizar los formularios de los Sistemas Electrónicos de Comunicación de Información entre los Estados miembros y los terceros países asociados.
- Actualizar la cláusula social que rige las condiciones de trabajo a bordo de los buques de la UE para que refleje mejor la normativa internacional en vigor, así como buscar mecanismos para vigilar su cumplimiento.
- Incluir en los ACPS disposiciones que modulen la contrapartida financiera que la UE abona para el acceso a las aguas en caso de aprovechamiento insuficiente de las posibilidades de pesca, o si los cambios en las condiciones técnicas afectaran a la capacidad operativa de la flota de la UE para explotar las posibilidades de pesca negociadas.
- Centrarse en evaluar los logros técnicos y operativos que resultan de la ejecución a lo largo del tiempo de las acciones de apoyo sectorial financiadas por la UE.
- Establecer un marco de competencias jurídicas claras que permitan a la UE comprobar los gastos declarados por los terceros países asociados y correspondientes al uso del apoyo sectorial de la UE.
- Definir los mecanismos de coordinación interna entre los servicios de la Comisión Europea encargados de velar por la coherencia entre los ACPS y el resto de actuaciones de la UE.
- Considerar la pertinencia de introducir en los ACPS una cláusula invitando al país asociado a que se abstenga de otorgar autorizaciones de pesca a buques pesqueros con pabellón identificado por la UE como perteneciente a un país que no coopera en la lucha contra la pesca ilegal, no declarada y no regulada.
- Mejorar la transparencia pública y comunicar sobre los resultados y el impacto derivados de la ejecución de los componentes de acceso y apoyo sectorial de los ACPS.

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ZUSAMMENFASSUNG

- 1. Nachhaltige partnerschaftliche Fischereiabkommen (SFPA) sind internationale Abkommen, die mit Partnerdrittländern zu dem Zweck geschlossen werden, Zugang zu ihren Gewässern und Ressourcen zu erhalten**, um gegen eine finanzielle Gegenleistung der EU, die eine Förderung des Fischereisektors einschließt, einen Anteil am Überschuss der biologischen Meeresschätze nachhaltig zu nutzen. Es gibt im Wesentlichen zwei Arten von SFPA, die EU-Fischereifahrzeugen den Zugang zu Gewässern von Partnerdrittländern erlauben: SFPA, die einen Zugang zwecks Nutzung eines breiten Spektrums an Fischbeständen einräumen (so genannte „Mehrarten-SFPA“), und SFPA, die den Zugang zwecks Nutzung weit wandernder Arten gewähren (so genannte „Thunfisch-SFPA“).
- 2. Im Dezember 2020 waren dreizehn SFPA mit Durchführungsprotokollen in Kraft**, darunter vier Mehrarten-SFPA (Grönland, Guinea-Bissau, Mauretanien und Marokko) und neun Thunfisch-SFPA (Cookinseln, Côte d'Ivoire, Gambia, Kap Verde, Liberia, Mauritius, São Tomé und Príncipe, Senegal und die Seychellen), wobei im Fall von Gambia und Senegal in begrenztem Maße zusätzliche Fangmöglichkeiten zur Nutzung bodenlebender Arten bestehen. Darüber hinaus gab es sieben SFPA, für die keine Durchführungsprotokolle in Kraft waren – die so genannten ‚ruhenden‘ SFPA (Äquatorialguinea, Gabun bis 2021¹⁶, Kiribati, Föderierte Staaten von Mikronesien, Madagaskar, Mosambik und Salomonen).
- 3. Zwischen 2015 und 2020 beliefen sich die EU-Finanzzusagen an Partnerdrittländer im Durchschnitt auf einen Jahresgesamtbetrag von 159 Millionen Euro, von denen 126 Millionen Euro aus dem öffentlichen EU-Haushalt stammten** (98 Millionen Euro als Beitrag für Zugangsrechte und 28 Millionen Euro als sektorbezogene finanzielle Unterstützung) und 33 Millionen Euro von Eignern von EU-Fischereifahrzeugen gezahlt wurden, denen die verfügbaren Fangmöglichkeiten zugutekamen. Rund 90 % des EU-Beitrags entfielen auf die mit Guinea-Bissau, Grönland, Mauretanien und Marokko abgeschlossenen Mehrarten-SFPA.
- 4. Zwischen 2015 und 2020 machten pro Jahr durchschnittlich 211 Fischereifahrzeuge unter den Flaggen von 13 EU-Mitgliedstaaten** von den verfügbaren Fangmöglichkeiten Gebrauch und erzielten eine Fangmenge von rund 300.000 Tonnen an Fischereierzeugnissen, von denen 49 % auf kleine pelagische Arten und 39 % auf weit wandernde Arten entfielen. Die Tätigkeiten der EU-Fangflotte, die im Rahmen von SFPA im Einsatz war, haben direkt zur Beschäftigung von durchschnittlich 3.650 Angehörigen von EU-Mitgliedstaaten und 2.650 Drittlandsangehörigen pro Jahr beigetragen, wobei jährlich durchschnittlich 15.000 zusätzliche Arbeitsplätze im Fischverarbeitungssektor von Drittländern gefördert wurden, darunter 9.000 Arbeitsplätze für Frauen. Die Partnerdrittländer, die günstige Bedingungen für Interaktionen zwischen der EU-Flotte und ihrem Fischereisektor bieten konnten, haben zusätzliche wirtschaftliche und soziale Vorteile aus den Fangtätigkeiten der EU-Fischereifahrzeuge gezogen, die im Rahmen von SFPA im Einsatz waren.
- 5. Der in Mehrarten-SFPA zur Anpassung der Fangmöglichkeiten der EU von Protokoll zu Protokoll oder während deren Umsetzung verfolgte Ansatz hat sich als wirksam für die Anpassung des von der EU ausgeübten Befischungsdrucks auf bestimmte als überfischt bewertete Schlüsselbestände in Westafrika** (kleine pelagische Arten, Kopffüßer) erwiesen. Dieser Ansatz hat bei bestimmten Beständen, die nun innerhalb der Grenzen der Nachhaltigkeit genutzt werden, zu positiven Ergebnissen geführt, konnte jedoch nicht immer den Erhalt jener Bestände wirksam gewährleisten, für die der von den Partnerdrittländern

¹⁶ Das SFPA mit Gabun wurde 2021 nach Inkrafttreten eines neuen Protokolls am 29. Juni 2021 für einen Zeitraum von fünf Jahren wirksam.

umgesetzte Bewirtschaftungsrahmen nicht ausreichte, um einen erhöhten Befischungsdruck seitens der nationalen oder ausländischen Flotten zu verhindern. **Im Fall der Thunfisch-SFPA** haben die Abkommen wirksam gewährleistet, dass die im multilateralen Rahmen der regionalen Fischereiorganisationen (RFO) ergriffenen Erhaltungs- und Bewirtschaftungsmaßnahmen auch in den Gewässern der Partnerdrittländer angewendet wurden.

6. **Der EU-Beitrag zur sektorbezogenen Unterstützung hat dazu geführt, dass zwischen 2015 und 2020 rund 200 Millionen Euro über die Haushalte der Partnerdrittländer gelenkt wurden, um zur Erreichung von Ziel 14 der Vereinten Nationen für nachhaltige Entwicklung beizutragen**, und insbesondere zur Umsetzung der Unterziele 14.b (Zugang zu Märkten), 14.4 (die Fangtätigkeit regeln und Überfischung sowie IUU-Fischerei beenden) und 14.a (die wissenschaftlichen Kenntnisse vertiefen). Die Evaluierung hat bestätigt, dass die im Rahmen der SFPA erfolgten EU-Interventionen im Einklang mit anderen Maßnahmen der EU standen, die auf nationaler oder regionaler Ebene über Entwicklungsprogramme umgesetzt wurden und Auswirkungen auf den Fischereisektor von Partnerdrittländern hatten, wobei es **zahlreiche Beispiele für Synergien und Komplementaritäten zwischen den verschiedenen EU-Maßnahmen** gibt.
7. **Die im Rahmen der SFPA-Komponente „sektorbezogene Unterstützung“ durchgeführten Maßnahmen haben dazu beigetragen, die Kapazitäten der Partnerdrittländer zur Bekämpfung der IUU-Fischerei und für wissenschaftliche Forschung auszubauen.** Die SFPA haben zur Stärkung der Beobachtungs-, Kontroll- und Überwachungskapazitäten der Partnerdrittländer beigetragen, insbesondere über: i) die Modernisierung der Fischereiüberwachungszentren der Partnerdrittländer über den Erwerb von Geräten und Software zur Satellitenüberwachung der Position von Fischereifahrzeugen (Schiffsüberwachungssysteme) und für den Empfang elektronischer Fangmeldungen (elektronische Meldesysteme), ii) die Stärkung des Rechtsrahmens und iii) Ausrüstung und Unterstützung bei der Durchführung von Überwachungspatrouillen. **Was die wissenschaftliche Forschung betrifft**, so haben die SFPA die Durchführung von Forschungskampagnen auf See und die Einführung von Datenerhebungssystemen gefördert, wobei die Forschungsergebnisse direkt von den Partnerdrittländern zur Ausarbeitung von Fischereimanagementplänen genutzt wurden. Überdies hat das Sektorförderungsprogramm die Kapazitäten der Partnerdrittländer zur Aufrechterhaltung oder Erlangung von Genehmigungen der Gesundheitsbehörden der EU für die Ausfuhr von Fischerei- und Aquakulturerzeugnissen in die EU sowie zur Ausweisung und Verwaltung von Meeresschutzgebieten gestärkt.
8. **Weitere im Rahmen der SFPA-Komponente „sektorbezogene Unterstützung“ durchgeführte Maßnahmen haben öffentliche Investitionen zugunsten des Fischereisektors in den Partnerdrittländern gefördert, insbesondere des handwerklichen Sektors.** Je nach Kontext und den verfügbaren Mitteln wurde der EU-Beitrag zur sektorbezogenen Unterstützung für die Entwicklung von Infrastruktur (Anlandestellen, Verarbeitungsstätten, soziale Einrichtungen), die Modernisierung der vorhandenen Anlandestellen und die Verbesserung der Bedingungen für den Umschlag und die Verarbeitung der angelandeten Fänge, die Sicherheit auf See (Such- und Rettungskapazitäten, Sicherheitsausrüstungen für handwerkliche Fischer), die berufliche Ausbildung zu dem Ziel, Arbeitnehmer des Fischereisektors anzuwerben und fachlich weiterzuqualifizieren, und die Umsetzung nationaler Programme zur Förderung der Modernisierung oder Anpassung der handwerklichen Flotten verwendet.
9. **Insgesamt gelangt die Evaluierung zu dem Schluss, dass die SFPA den Anforderungen** im Hinblick auf folgende Ziele **gerecht werden**: i) Beitrag zur Erhaltung der Ressourcen und zur ökologischen Nachhaltigkeit über eine rationale und nachhaltige Nutzung der in den Gewässern der Partnerdrittländer lebenden

Meeresressourcen, ii) Beitrag zur Aufrechterhaltung der Tätigkeiten der EU-Fischereiflotten, die außerhalb der Unionsgewässer fischen, und zur hiermit verbundenen Beschäftigung, und iii) Förderung der Entwicklung eines nachhaltigen Fischereisektors in den Partnerdrittländern. **Die Evaluierung hat jedoch bestimmte Bereiche aufgezeigt, in denen sich die Leistung des Instruments insbesondere hinsichtlich seiner Umsetzung verbessern ließe.**

KURZFASSUNG

BEWERTUNGSKONTEXT

- 1. Nachhaltige partnerschaftliche Fischereiabkommen (SFPA) sind internationale Abkommen, die mit Partnerdrittländern zu dem Zweck geschlossen werden, Zugang zu ihren Gewässern und Ressourcen zu erhalten,** um gegen eine finanzielle Gegenleistung der EU, die eine Förderung des Fischereisektors einschließt, einen Anteil am Überschuss nachhaltig zu nutzen. Es gibt im Wesentlichen zwei Arten von SFPA, die EU-Fischereifahrzeugen den Zugang zu Gewässern von Partnerdrittländern erlauben: SFPA, die einen Zugang zwecks Nutzung eines breiten Spektrums an Fischbeständen einräumen (so genannte „Mehrarten-SFPA“), und SFPA, die den Zugang zwecks Nutzung weit wandernder Arten gewähren (so genannte „Thunfisch-SFPA“).
- 2. Die Evaluierung der im Rahmen von SFPA erfolgten Interventionen wurde im Einklang mit den von der EU veröffentlichten Leitlinien für eine bessere Rechtsetzung vorgenommen.** Ihre Ergebnisse basieren auf veröffentlichten Dokumenten und Datenbanken sowie gezielten Befragungen von Interessensvertretern in der EU und in Partnerdrittländern. Des Weiteren wurde auf der Website¹⁷ der Europäischen Kommission zwischen März und Juni 2021 eine öffentliche Konsultation durchgeführt. Die Untersuchung konzentrierte sich auf den Zeitraum 2015-2020, wobei jedoch auch frühere Zeiträume berücksichtigt wurden, sofern sie für die Evaluierung relevant waren.
- 3. Das übergeordnete Ziel von SFPA besteht darin, sicherzustellen, dass Fangtätigkeiten in den Gewässern von Partnerdrittländern im Einklang mit den internationalen Verpflichtungen der EU sowie mit den Zielsetzungen und Grundsätzen der Gemeinsamen Fischereipolitik der Union erfolgen.** Konkret zielen SFPA darauf ab, i) zu Ressourcenschonung und nachhaltiger Nutzung von Meeresschätzen in den Gewässern der Partnerdrittländer beizutragen, ii) zum Schutz der Fernfischereiflotte der EU und der mit ihr verbundenen Arbeitsplätze beizutragen und iii) die Entwicklung eines nachhaltigen Fischereisektors in den Partnerdrittländern zu fördern.
- 4. SFPA umfassen zwei Komponenten: die Komponente „Zugangsrechte“,** die die technischen und finanziellen Voraussetzungen für den Zugang von Fischereifahrzeugen aus der EU zu den Gewässern der Partnerdrittländer regelt, und **die Komponente „sektorbezogene Unterstützung“** zur Festlegung des Anwendungsbereichs und der Grundsätze für die Verwendung der EU-Beihilfen zugunsten der Umsetzung der Fischereipolitik des Partnerdrittlandes. Die für Zugangsrechte und zur sektorbezogenen Unterstützung geleisteten EU-Zuwendungen sind voneinander abgekoppelt, das heißt Gegenstand jeweils eigener Auszahlungsregeln.
- 5. Der Regelungsrahmen der SFPA beruht auf vier Grundprinzipien, die über spezifische Klauseln in sämtlichen SFPA verankert sind: Menschenrechte und die Einhaltung demokratischer Grundsätze** als wesentliche Bestandteile der SFPA, **Nichtdiskriminierung** über das Verbot, anderen Flotten günstigere Bedingungen als Betreibern aus der EU zu gewähren, **Transparenz**, um sicherzustellen, dass relevante Informationen zu Abkommen verfügbar sind, die anderen Flotten Zugang einräumen, und **Ausschließlichkeit**, wodurch europäischen Fischereifahrzeugen der Zugang zu den Gewässern der Partnerdrittländer untersagt bleibt, solange sie keine im Einklang mit dem SFPA erteilte Fangerlaubnis vorweisen können.

¹⁷ https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/12728-Fischerei-Bewertung-der-partnerschaftlichen-Abkommen-uber-nachhaltige-Fischerei-der-EU_de

6. **Im Dezember 2020 waren dreizehn SFPA mit Durchführungsprotokollen in Kraft**, darunter vier Mehrarten-SFPA (Grönland, Guinea-Bissau, Mauretanien und Marokko) und neun Thunfisch-SFPA (Cookinseln, Côte d'Ivoire, Gambia, Kap Verde, Liberia, Mauritius, São Tomé und Príncipe, Senegal und Seychellen). Im Fall von Gambia und Senegal bestehen in begrenztem Maße zusätzliche Fangmöglichkeiten zur Nutzung bodenlebender Arten. Darüber hinaus gab es sieben SFPA, für die keine Durchführungsprotokolle in Kraft waren – so genannte ‚ruhende‘ SFPA (Äquatorialguinea, Gabun bis 2021¹⁸, Kiribati, Föderierte Staaten von Mikronesien, Madagaskar, Mosambik und Salomonen). Die folgende Tabelle zeigt die öffentlichen Beiträge, zu deren Zahlung sich die EU im Rahmen der dreizehn SFPA verpflichtet hat, zu denen im Dezember 2020 ein Durchführungsprotokoll in Kraft war.

Die dreizehn SFPA mit gültigem Durchführungsprotokoll im Dezember 2020

Partnerdrittland	SFPA-Datum	Protokoll-Anfangsdatum	Protokoll-Enddatum	Jahresbeitrag der EU gegen Zugang* (EUR)	Jahresbeitrag der EU zur sektorbezogenen Unterstützung* (EUR)	Jährlicher Gesamtbeitrag der EU* (EUR)
Grönland	01.01.2013	01.01.2016	31.12.2020	13.168.978	2.931.000	16.099.978
Marokko	18.07.2019	18.07.2019	17.07.2023	19.100.000	17.900.000	37.000.000
Kap Verde	20.03.2007	20.05.2019	19.05.2024	400.000	350.000	750.000
Mauretanien	30.11.2006	16.11.2015	15.11.2021	57.500.000**	4.125.000	61.625.000
Senegal	20.11.2014	18.11.2019	17.11.2024	800.000	900.000	1.700.000
Gambia	31.07.2019	31.07.2019	30.07.2025	275.000	275.000	550.000
Guinea-Bissau	16.06.2007	15.06.2019	14.06.2024	11.600.000	4.000.000	15.600.000
Côte d'Ivoire	01.07.2007	01.08.2018	31.07.2024	330.000	352.000	682.000
Liberia	09.12.2015	09.12.2015	08.12.2020	357.000	357.000	714.000
São Tomé und Príncipe	01.06.2006	19.12.2019	18.12.2024	400.000	440.000	840.000
Mauritius	28.01.2014	08.12.2017	07.12.2021	220.000	355.000	575.000
Seychellen	24.02.2020	24.02.2020	23.02.2026	2.500.000	2.800.000	5.300.000
Cookinseln	14.10.2016	14.10.2016	13.11.2021	385.000	350.000	735.000

Quelle: GD MARE

Anmerkung: *Die in der Tabelle aufgeführten EU-Beiträge beziehen sich auf das jeweils erste Protokolljahr. Bei bestimmten Protokollen können sie im Laufe der Zeit zu- oder abnehmen.

**Ab 2017 nach Aufnahme einer neuen Fangkategorie in das SFPA.

7. **Zwischen 2015 und 2020 beliefen sich die EU-Finanzzusagen an Partnerdrittländer im Durchschnitt auf einen Jahresgesamtbetrag von 159 Millionen Euro, von denen 126 Millionen Euro aus dem öffentlichen EU-Haushalt stammten** (98 Millionen Euro als Beitrag für Zugangsrechte und 28 Millionen Euro als sektorbezogene finanzielle Unterstützung) und 33 Millionen Euro von Eignern von EU-Fischereifahrzeugen gezahlt wurden, die von den verfügbaren Fangmöglichkeiten Gebrauch machten. Rund 90 % der öffentlichen EU-Beiträge wurden an die vier Partnerdrittländer gezahlt, mit denen Mehrarten-SFPA bestanden. Die weiteren Partnerdrittländer erhielten jeweils vergleichsweise niedrige Anteile der öffentlichen EU-Beiträge (1 % und weniger). Eine Ausnahme stellten hier die Seychellen dar (4 %). Nach Regionen aufgeschlüsselt setzten sich die im Rahmen von SFPA gezahlten öffentlichen EU-Beiträge aus 81 % an Partnerdrittländer im Mittelostatlantik (hauptsächlich Westafrika), nahezu 13 % an Grönland, 6 % an Partnerdrittländer im Indischen Ozean und 0,7 % an Partnerdrittländer im Pazifischen Ozean zusammen.

¹⁸ Das SFPA mit Gabun wurde 2021 nach Inkrafttreten eines neuen Protokolls am 29. Juni 2021 für einen Zeitraum von fünf Jahren wirksam.

8. **Zwischen 2015 und 2020 nutzten pro Jahr durchschnittlich 211 EU-Fischereifahrzeuge die über SFPA gewährten Fangmöglichkeiten.** Die Fischereiflotte der EU mit Zugang zu Gewässern von Partnerdrittländern umfasst große Hochseeschiffe (z. B. Grund- und kleine pelagische Trawler, Thunfischfänger und Oberflächenlangleiner) sowie kleine Fischereifahrzeuge aus EU-Regionen, die an die Gewässer der Partnerdrittländer angrenzen, einschließlich der Regionen in äußerster Randlage Spaniens (Kanarische Inseln) und Frankreichs (Réunion und Mayotte). Auf die EU-Fischereiflotte, die im Rahmen von SFPA Fangmöglichkeiten nutzte, entfielen 0,3 % der Gesamtanzahl der EU-Fischereifahrzeuge aus allen EU-Mitgliedstaaten, jedoch 19 % der in Tonnage (BRZ) gemessenen gesamten Fangkapazität der EU-Flotte und 6 % ihrer in Maschinenleistung (kW) ausgedrückten Gesamtfangkapazität. Die Fischereifahrzeuge, die zwischen 2015 und 2020 von den verfügbaren Fangmöglichkeiten Gebrauch machten, waren in 13 verschiedenen EU-Mitgliedstaaten registriert¹⁹. Fischereifahrzeuge aus Spanien stellten 66 % der Gesamtanzahl und 33 % der Gesamtkapazität in kW der EU-Fangflotte dar, die im Rahmen von SFPA im Einsatz war.
9. Zwischen 2015 und 2020 **betrogen die in den Gewässern von Partnerdrittländern erzielten EU-Fangmengen durchschnittlich rund 300.000 Tonnen pro Jahr**, von denen nach Gewicht 49 % auf kleine pelagische Arten, 39 % auf weit wandernde Arten, 10 % auf verschiedene weitere Fischarten (überwiegend Seehecht) und 2 % auf Krebstierarten entfielen. **Der durchschnittliche jährliche Erstverkaufswert dieser Fänge belief sich auf 410 Millionen Euro.** Der gesamte im Rahmen von SFPA erzielte EU-Fang stellte 9 % der durchschnittlichen Gesamtfangmengen der EU dar und trug zu 21 % der EU-Fangmengen bei weit wandernden Arten sowie zu 8 % bei kleinen pelagischen Arten bei. Ein Großteil des von EU-Schiffen im Rahmen von SFPA erzielten Fangs wird im Unionsmarkt verbraucht. Er deckt 3 % des Bedarfs des EU-Markts an Fischereierzeugnissen, wobei er zur Deckung von 6 % des Bedarfs an weit wandernden Arten und 7 % des Bedarfs an kleinen pelagischen Arten beiträgt. Schätzungsweise 27.000 Tonnen der EU-Fangmenge dienen jährlich der Versorgung des inländischen Markts in den Partnerdrittländern, überwiegend über den Verkauf von Beifängen von EU-Thunfischfängern und Anlandungen von Sachbeiträgen für Zugangsrechte für EU-Trawler bestimmter Kategorien in Mauretanien und Guinea-Bissau.
10. **Die Anzahl der direkt mit den Tätigkeiten der EU-Fischereifahrzeuge verbundenen Arbeitsplätze wird auf rund 6.500 Beschäftigte im Jahresdurchschnitt geschätzt, darunter 3.650 EU-Bürger und 2.850 Staatsangehörige von Drittländern.** In den meisten SFPA ist die Beschäftigung einer bestimmten Anzahl oder eines festen Anteils an Staatsangehörigen der Partnerdrittländer oder von AKP-Ländern festgelegt. In der Regel – wenngleich nicht immer – werden die Bestimmungen der SFPA von den Betreibern von EU-Fischereifahrzeugen eingehalten oder übertroffen. Die Arbeitsbedingungen an Bord von EU-Fischereifahrzeugen unterliegen gemäß den einschlägigen SFPA-Bestimmungen den von der Internationalen Arbeitsorganisation ausgearbeiteten internationalen Normen. Die Mindestausbildungsniveaus entsprechen jenen des von der Internationalen Seeschiffahrtsorganisation verabschiedeten Übereinkommens, das von den wichtigsten EU-Mitgliedstaaten, die an SFPA beteiligt sind, ratifiziert wurde²⁰. Darüber hinaus sichern die Tätigkeiten von EU-Fischereifahrzeugen im Jahresdurchschnitt schätzungsweise zusätzliche 15.000 Arbeitsplätze im Fischverarbeitungssektor der Partnerdrittländer, von denen 9.000 Arbeitsplätze auf Frauen entfallen.

¹⁹ In alphabetischer Reihenfolge: Dänemark, Deutschland, Estland, Frankreich, Griechenland, Italien, Lettland, Litauen, Niederlande, Polen, Portugal, Spanien und das Vereinigte Königreich.

²⁰ Das Übereinkommen STCW-F der Internationalen Seeschiffahrtsorganisation ist unter anderem von Dänemark, Frankreich, Lettland, Litauen, den Niederlanden, Polen, Portugal und Spanien ratifiziert worden (Stand: Ende 2020).

- 11. Bestimmte Partnerdrittländer haben über die Erbringung von Waren und Dienstleistungen an EU-Fischereifahrzeuge, die Beschäftigung von Arbeitskräften an Bord und die Verarbeitung des Fangs an Land erhebliche zusätzliche wirtschaftliche Vorteile aus den Tätigkeiten der EU-Fischereifahrzeuge gezogen.** Diese Vorteile kamen jenen Partnerdrittländern zugute, die günstige Rahmenbedingungen für Interaktionen mit EU-Fischereifahrzeugen boten (u. a. Marokko, Mauretanien, Kap Verde, Senegal und Côte d'Ivoire im Atlantischen Ozean, Madagaskar, Mauritius und Seychellen im Indischen Ozean und Kiribati im Pazifischen Ozean), beispielsweise Häfen mit Liegekapazitäten für große Schiffe und/oder EU-lebensmittelrechtskonforme Fischverarbeitungsindustrien. Partnerdrittländer hingegen, die diese Rahmenbedingungen nicht bieten konnten, hatten keine oder kaum Interaktionen mit der EU-Flotte (Gabun, Guinea-Bissau, Liberia und São Tomé und Príncipe im Atlantischen Ozean sowie die Komoren im Indischen Ozean). SFPA führten zu einem direkten und indirekten wirtschaftlichen Mehrwert in Höhe von durchschnittlich 477 Millionen Euro pro Jahr, wobei 52 % dieses wirtschaftlichen Mehrwerts Drittländern zugutekamen. Die SFPA umfassten verhältnismäßige Bestimmungen, die Interaktionen zwischen der EU-Flotte und den Partnerdrittländern – je nach Fall – vorschreiben oder fördern.
- 12. Der EU-Beitrag zur Förderung des Fischereisektors zielt darauf ab, die von beiden Parteien im Einklang mit der nationalen Fischereipolitik des Partnerdrittlandes sowie der Gemeinsamen EU-Fischereipolitik festgelegten Prioritäten zu unterstützen.** Zu jedem SFPA wurde im Rahmen der Gemischten Ausschüsse ein Mehrjahresplan für die Protokolllaufzeit verabschiedet, der die verschiedenen Maßnahmen und Vorhaben samt der jeweiligen Budgets festlegte, die zur Umsetzung der von beiden Vertragspartnern innerhalb dieser Prioritäten abgesteckten Ziele vorgesehen waren. Gemäß den Protokollbestimmungen wurden die Fortschritte bei der Umsetzung dieser Ziele jährlich von den Gemischten Ausschüssen anhand der von den Partnerdrittländern erwarteten Berichte bewertet, und die Zahlung des jährlichen Anteils des EU-Beitrags für die sektorbezogene Unterstützung wird auf der Grundlage der von den Drittpartnerländern erzielten Ergebnisse ausgezahlt. Die EU ist berechtigt, die Zahlungen ganz oder teilweise auszusetzen, falls die Ergebnisse nicht mit den im Mehrjahresplan vereinbarten Zielsetzungen übereinstimmen (was bereits vorgekommen ist). Die Modalitäten der Umsetzung des EU-Beitrags zur sektorbezogenen Unterstützung sind in der Regel in den seitens der Gemischten Ausschüsse verabschiedeten freiwilligen Leitlinien festgelegt. Eine Ausnahme bildet hier das SFPA mit Mauretanien, dessen Umsetzungsmodalitäten einen Anhang zu den seit 2012 umgesetzten Protokollen darstellten.
- 13. Der EU-Beitrag zur sektorbezogenen Unterstützung hat dazu geführt, dass zwischen 2015 und 2020 rund 200 Millionen Euro über die Haushalte der Partnerdrittländer gelenkt wurden, um zur Erreichung von Ziel 14 der Vereinten Nationen für nachhaltige Entwicklung beizutragen,** insbesondere zur Umsetzung der Unterziele 14.b (Zugang zu Märkten), 14.4 (die Fangtätigkeit regeln und Überfischung sowie IUU-Fischerei beenden) und 14.a (die wissenschaftlichen Kenntnisse vertiefen). Je nach Kontext wurde der Schwerpunkt des EU-Beitrags unterschiedlich gelagert: Bei der Mehrzahl der finanziell betrachtet ‚kleinen‘ SFPA (Cookinseln, Côte d'Ivoire, Gabun, Gambia, Kap Verde, Kiribati, Komoren, Liberia, Madagaskar, Mauritius und São Tomé und Príncipe) konzentrierte sich die Verwendung der Haushaltsmittel auf Tätigkeiten, die zum Nachhaltigkeitsziel 14.4 (die Fangtätigkeit regeln und Überfischung sowie IUU-Fischerei beenden) beitrugen, während im Rahmen der ‚großen‘ SFPA (Mauretanien, Marokko und Seychellen) erhebliche Mittel für die Unterstützung des Nachhaltigkeitsziels 14.b (Zugang zu Märkten) aufgewendet wurden. Die dem Nachhaltigkeitsziel 14.a (die wissenschaftlichen Kenntnisse vertiefen) gewidmeten Sektorförderungsmittel stellten einen erheblichen Anteil (mindestens

15 %) des EU-Beitrags in Côte d'Ivoire, Grönland, Guinea-Bissau, Kap Verde, Mauritius, Marokko und Senegal dar.

14. **Insgesamt wurden 48 % des EU-Beitrags für die zwischen 2015 und 2020 im Rahmen von SFPA erfolgte sektorbezogene Unterstützung darauf verwendet, die Behörden der Partnerdrittländer bei der Wahrnehmung ihrer Aufgaben zu unterstützen** (28 % kamen Verwaltungsbehörden, 20 % Forschungsinstituten zugute), **und 52 % wurden zur Unterstützung öffentlicher Investitionen zugunsten des Fischereisektors verwendet** (19 % für die Akteure des Fischerei- und des Aquakultursektors einschließlich der Verarbeitung und 33 % für handwerkliche Fischereigemeinschaften). Das Gleichgewicht zwischen diesen beiden Begünstigtenkategorien unterschied sich je nach Kontext und Partnerdrittländ, wobei der überwiegende Teil des zur sektorbezogenen Unterstützung geleisteten EU-Beitrags für die Förderung öffentlicher Maßnahmen zugunsten des Privatsektors im Rahmen der SFPA mit Gambia, Kiribati, Mauretanien, Marokko und den Seychellen verwendet wurde.
15. **Der Ausbau der Kapazitäten der Behörden der Partnerdrittländer im Hinblick auf die Überwachung, Kontrolle und Beaufsichtigung der Fischfang- und wissenschaftlichen Forschungstätigkeiten bildeten zwischen 2015 und 2020 die Schwerpunkte der in nahezu sämtlichen Partnerdrittländern umgesetzten sektorspezifischen Förderprogramme.** Zu den mithilfe des EU-Beitrags zur sektorbezogenen Unterstützung durchgeführten Maßnahmen zählten insbesondere: die Modernisierung der Fischereiüberwachungszentren der Partnerdrittländer über den Erwerb von Geräten und Software zur Satellitenüberwachung der Position von Fischereifahrzeugen (Schiffsüberwachungssysteme) und für den Empfang elektronischer Fangmeldungen (elektronische Meldesysteme), die Stärkung des Rechtsrahmens, Ausrüstung und Unterstützung bei der Durchführung von Patrouillen und meereswissenschaftlichen Erhebungen und die Unterstützung bei der Entwicklung und Anwendung von Systemen zur Erhebung wissenschaftlicher Daten. Weitere Initiativen zum Kapazitätsausbau der Verwaltungsbehörden, die mithilfe des zur sektorbezogenen Förderung geleisteten finanziellen EU-Beitrags ergriffenen wurden, umfassten die Unterstützung bei der Identifizierung und Umsetzung einzelstaatlicher Maßnahmen zum Fischereimanagement (zum Beispiel Cookinseln, Côte d'Ivoire, Gambia, Grönland, Guinea-Bissau, Kiribati, Komoren, Mauretanien, Marokko und Seychellen) sowie Unterstützung bei der Zahlung von Pflichtbeiträgen der Partnerdrittländer an die jeweiligen internationalen Fischereiorganisationen (zum Beispiel Côte d'Ivoire, Guinea-Bissau, Kap Verde, Liberia, Senegal und São Tomé und Príncipe).
16. **Der EU-Beitrag zur sektorbezogenen Förderung wurde zur Unterstützung öffentlicher Maßnahmen verwendet, die direkt dem Fischereisektor in den Partnerdrittländern zugutekamen** und im Einklang mit den nationalen Prioritäten standen, insbesondere dem handwerklichen Sektor (33 % des Gesamtbeitrags der EU). Bei den Maßnahmen zugunsten des Fischereisektors handelte es sich hauptsächlich um die Entwicklung von Infrastruktur (Guinea-Bissau, Marokko, Mauretanien, Senegal und Seychellen), auf die 24 % des Gesamtbeitrags der EU zur sektorbezogenen Unterstützung entfielen, die Verbesserung der Bedingungen an den vorhandenen Anlandestellen (Lagerung und Verarbeitung handwerklicher Erzeugnisse in Côte d'Ivoire, Gambia, Guinea-Bissau, Kap Verde, Marokko, Senegal und Seychellen), die Sicherheit auf See (Bereitstellung von Sicherheitsausrüstung für handwerkliche Fischer auf den Cookinseln, in Guinea-Bissau, in Kap Verde, auf den Komoren, in Madagaskar und in Senegal) und die Förderung der beruflichen Ausbildung, um Arbeitnehmer des Fischereisektors anzuwerben und fachlich weiterzuqualifizieren (Guinea-Bissau, Mauretanien, Marokko und Seychellen). Bestimmte Partnerdrittländer haben die sektorbezogene Unterstützung dazu genutzt, Anreize (Darlehen, Finanzhilfen) zur Modernisierung oder Anpassung der handwerklichen Flotten zu entwickeln

(beispielsweise die Cookinseln, Côte d'Ivoire, Mauritius, São Tomé und Príncipe und Seychellen).

WESENTLICHE SCHLUSSFOLGERUNGEN DER EVALUIERUNG

Relevanz: Inwieweit wurden die SFPA den Anforderungen (noch) gerecht?

17. Bei der Bewertung der Relevanz der FPA hat sich bestätigt, dass die SFPA einen angemessenen Rahmen darstellten, um Folgendes zu erfüllen:

- die **Anforderungen und Ziele der Gemeinsamen Fischereipolitik der EU** in unionsfremden Gewässern dank der Identifizierung und Überwachung der Zugangsmodalitäten für Fischereifahrzeuge der EU unter Bedingungen, die die Nachhaltigkeit ihrer Fangtätigkeiten im Einklang mit den Normen der Gemeinsamen Fischereipolitik und den im Rahmen der einschlägigen internationalen Übereinkommen bestehenden Pflichten der EU gewährleisten;
- die **Anforderungen der Partnerdrittländer** im Hinblick auf i) finanzielle Erträge aus überschüssigen Beständen und/oder ihrer geografischen Lage an den Migrationspfaden weit wandernder Arten und ii) den Aufbau einer mit spezifischen Finanzmitteln ausgestatteten Partnerschaft zur Stärkung ihrer Fischereipolitik und zur nachhaltigen Entwicklung ihrer Fischereisektoren; und
- die **Anforderungen der Hochseeflotte der EU und bestimmter Segmente der handwerklichen EU-Flotte** hinsichtlich des Zugangs zu den ertragreichen Fanggebieten in unionsfremden Gewässern und der Schaffung gleicher Ausgangsbedingungen für Betreiber aus der EU und Betreiber aus Drittländern.

Die Abkoppelung des EU-Beitrags gegen Zugangsrechte vom EU-Beitrag zur sektorbezogenen Unterstützung hat sich angesichts der unterschiedlichen Natur der beiden Komponenten als sinnvolle Erleichterung ihrer getrennten Verwaltung durch die Parteien erwiesen.

18. **Bei der Evaluierung hat sich indes gezeigt, dass die Relevanz der SFPA eingeschränkt wurde durch i) das Fortbestehen ruhender SFPA**, die EU-Schiffe während mehrjähriger Zeiträumen am Zugang zu den Gewässern von Partnerdrittländern hindern, während zugleich ihre ausländischen Wettbewerber Zugang zu den Fanggebieten hatten, **und ii) die Verhältnismäßigkeit zwischen dem im Gegenzug zu Zugangsrechten geleisteten EU-Beitrag und jenem zur sektorbezogenen Unterstützung**, was die Relevanz der SFPA im Hinblick auf die Anforderungen der Partnerdrittländer und insbesondere der am wenigsten entwickelten Länder und der kleinen Inselentwicklungsländer einschränkt.

Wirksamkeit: Inwieweit haben die SFPA ihre Ziele erreicht?

19. **Der im Rahmen der Mehrarten-SFPA zur Anpassung der Fangmöglichkeiten der EU** in den einzelnen Protokollen oder während ihrer Umsetzung **verfolgte Ansatz hat sich als wirksam für die Anpassung des von der EU ausgeübten Befischungsdrucks auf bestimmte** als überfischt bewertete Schlüsselbestände **in Westafrika** (kleine pelagische Arten, Kopffüßer) erwiesen. Der Ansatz hat bei bestimmten Beständen, die nun innerhalb der Grenzen der Nachhaltigkeit genutzt werden, zu positiven Ergebnissen geführt, war jedoch nicht immer wirksam, um den Erhalt der Bestände zu gewährleisten, für die der vom Partnerdrittländ umgesetzte Bewirtschaftungsrahmen nicht ausreichte, um einen erhöhten Befischungsdruck seitens der nationalen oder anderer ausländischer Flotten zu verhindern. Mangels ausreichender wissenschaftlicher Daten hat sich die Bestimmung des Ressourcenüberschusses jedoch als schwierig erwiesen. **Im Fall der Thunfisch-SFPA haben die Abkommen wirksam gewährleistet**, dass die im multilateralen Rahmen der regionalen Fischereiorganisationen (RFO) ergriffenen Erhaltungs- und

Bewirtschaftungsmaßnahmen auch in den Gewässern der Partnerdrittländer angewendet wurden.

20. **Die Anwendung eines ökosystembasierten Ansatzes bei der Bestandsbewirtschaftung hat im Rahmen der Mehrarten-SFPA kaum Wirkung gezeigt.** Obwohl dieser Punkt Teil der Tagesordnung der verschiedenen gemeinsamen wissenschaftlichen Ausschüsse war, stand der Mangel an einschlägigen wissenschaftlichen Daten der Identifizierung von Maßnahmen zur Verringerung unerwünschter Beifänge, zur Verhinderung von Interaktionen mit geschützten Arten und zur Reduzierung der potenziell negativen Auswirkungen von Fanggeräten auf den Meeresboden einschließlich empfindlicher mariner Ökosysteme entgegen. Die Thunfisch-SFPA haben hingegen wirksam gewährleistet, dass die von den zuständigen RFO in den Gewässern der Partnerdrittländer ergriffenen ökosystemischen Maßnahmen zur Anwendung kamen, wobei es über einzelne SFPA gelungen ist, strengere Ökosystemmaßnahmen vorzuschreiben (Gambia, Kap Verde und Seychellen).
21. **Insgesamt haben es die SFPA erlaubt, die Kapazitäten der Partnerdrittländer zur Überwachung und Kontrolle** der in ihrer Zuständigkeit liegenden **Fangtätigkeiten zu stärken und damit positiv zur weltweiten Bekämpfung der IUU-Fischerei beizutragen.** Die Hauptvorteile der EU-Interventionen im Rahmen der SFPA bestanden in: i) der Identifizierung und Umsetzung von **Maßnahmen zur gemeinsamen Beobachtung** der im Rahmen der SFPA betriebenen **EU-Fischereifahrzeuge** und ii) der Verwendung eines erheblichen Anteils des zur sektorbezogenen Förderung geleisteten EU-Beitrags für die **Verbesserung der technischen und personellen Kapazitäten der Fischereiüberwachungszentren** der Partnerdrittländer, für die Stärkung des Rechtsrahmens und als Beitrag zur Entsendung von Überwachungspatrouillen. Unklarheit besteht indes in Bezug auf die langfristigen Effekte der Maßnahmen, insbesondere aufgrund mangelnder Informationen dazu, inwieweit die für EU-Fischereifahrzeuge geltenden Bestimmungen hinsichtlich der Überwachung und Kontrolle auf andere Flotten ausgeweitet wurden, und zu den Auswirkungen des zur sektorbezogenen Unterstützung geleisteten EU-Beitrags, der für die Übernahme eines Teils der Betriebskosten der Kontrollbehörden in den Partnerdrittländern verwendet wurde. Darüber hinaus hat die Evaluierung eine mangelnde Konsistenz der Bestimmungen über den elektronischen Informationsaustausch zur Überwachung von EU-Fischereifahrzeugen (Schiffsüberwachungssysteme, elektronische Meldesysteme) gemäß den verschiedenen Protokollen offengelegt.
22. **Dank der SFPA wurde der Ausbau der wissenschaftlichen Kapazitäten in den Partnerdrittländern wirksam gefördert.** Über die im Rahmen der Zugangskomponente umgesetzten Beobachtungsmaßnahmen haben es die SFPA erlaubt, Informationen zu den Tätigkeiten der EU-Fischereifahrzeuge in den Gewässern der Partnerdrittländer zu erheben, die von den gemeinsamen wissenschaftlichen Ausschüssen zur Beobachtung der Ressourcenbestände genutzt werden, und die Mitwirkung von Staatsangehörigen der Partnerdrittländer an den wissenschaftlichen Arbeiten gefördert (wissenschaftliche Beobachter, Analysen im Rahmen der Gemeinsamen Wissenschaftlichen Ausschüsse). Die SFPA haben zudem zum Ausbau der Forschungskapazitäten über die Verwendung des zur sektorbezogenen Förderung geleisteten finanziellen EU-Beitrags für die Modernisierung der Forschungseinrichtungen und die Anwendung von Datenerfassungssystemen (wissenschaftliche Untersuchungen, Umfragen, Probenentnahmen aus den Fängen) zur Unterstützung des Managements im Fischereisektor beigetragen. In Bezug auf bestimmte Partnerdrittländer (beispielsweise Guinea-Bissau, Mauretanien, Marokko und Seychellen) wurde der **Nachweis erbracht, dass die über die Interventionen im Rahmen der Komponente „sektorbezogene Unterstützung“ der SFPA gewonnenen wissenschaftlichen Daten von den nationalen Verwaltungsbehörden** für die Ausarbeitung von Fischereimanagementplänen

genutzt wurden. Beeinträchtigt wurde die Wirksamkeit der SFPA hingegen von den Schwierigkeiten bestimmter Partnerländer, einen ausreichenden Pool an qualifizierten wissenschaftlichen Mitarbeitern aufrechtzuerhalten.

23. **Die im Rahmen der SFPA-Komponente „Zugangsrechte“ erfolgten EU-Interventionen haben wirksam zum Erhalt oder der Schaffung von rund 20.000 Arbeitsplätzen für Staatsangehörige der Drittländer sowie zur Schaffung eines wirtschaftlichen Mehrwerts von durchschnittlich 477 Millionen Euro pro Jahr beigetragen.** Der sozioökonomische Nutzen, den die Drittländer im Rahmen der SFPA aus den Tätigkeiten der EU-Fischereifahrzeuge ziehen, war jedoch ungleichmäßig verteilt. So ergaben sich größere Vorteile für die Partnerdrittländer, die in der Lage waren, attraktive Bedingungen für Interaktionen zwischen ihrem Fischereisektor und den EU-Flotten zu bieten. Wenngleich sie laut den Sozialpartnern der EU einer Aktualisierung bedarf, hat es die in allen SFPA enthaltene Sozialklausel erlaubt, menschenwürdige Arbeitsbedingungen für die an Bord von EU-Fischereifahrzeugen beschäftigten Drittstaatsangehörigen zu gewährleisten, wie die Antworten auf die gezielten Befragungen belegen. Eine Ausnahme stellen hier die Lohnniveaus dar, die bestimmten Gewerkschaften zufolge in einzelnen Fällen möglicherweise unterhalb der internationalen Normen liegen.
24. **Die im Rahmen der SFPA-Komponente „sektorbezogene Unterstützung“ erfolgten EU-Interventionen haben sich als wirksam für die Förderung der sozialen und wirtschaftlichen Entwicklung des Fischereisektors und insbesondere des handwerklichen Sektors in den Partnerdrittländern erwiesen.** Die durchgeführten Maßnahmen haben sich je nach den kontextabhängigen Bedingungen und den verfügbaren Budgets auf die Entwicklung von Infrastruktur, die Verbesserung der Bedingungen an den Anlandeorten, die Sicherheit auf See und die berufliche Ausbildung konzentriert. Obwohl eine umfassende Bewertung der Effekte der verschiedenen Interventionen aufgrund mangelnder Informationen über die langfristigen Auswirkungen der verschiedenen Maßnahmen, die im Rahmen der Mehrjahrespläne umgesetzt wurden, schwierig ist, sprechen die bei bestimmten Partnerdrittländern erhältlichen Daten dafür, dass dies insgesamt der Fall war. Die Verwendung der EU-Beiträge für die Aufrechterhaltung oder Erlangung der Genehmigung für die Ausfuhr von Fischereierzeugnissen in die EU waren insgesamt dann wirksam, wenn beide Parteien die sanitären Bedingungen als Prioritäten der Mehrjahrespläne ausgewählt hatten.
25. **Insgesamt haben die SFPA zwischen 2015 und 2020 die Tätigkeiten von durchschnittlich 211 EU-Fischereifahrzeugen im Jahr, die 19 % der gesamten Fangkapazität der EU in Tonnage (BRZ) und 6 % ihrer gesamten Fangkapazität in Maschinenleistung (kW) entsprechen, wirksam gefördert.** Die SFPA haben einen wirksamen Rahmen für die Förderung der wirtschaftlichen Nachhaltigkeit der EU-Außenflotte mit positiven Effekten im Hinblick auf die Beschäftigung von 3.600 Angehörigen von EU-Mitgliedstaaten im Jahresdurchschnitt geliefert. Den betroffenen europäischen Betreibern zufolge ließe sich die Wirksamkeit der über SFPA erfolgten EU-Interventionen weiter verbessern, indem: i) neue SFPA mit den Drittländern abgeschlossen würden, deren Gewässer für sie von Interesse sind, und ii) man sich des Falls der ruhenden SFPA ohne Durchführungsprotokoll annähme, die sich negativ auf ihre Einsatzstrategien und auf die Schaffung gleicher Ausgangsbedingungen für sie und ihre ausländischen Wettbewerber in unionsfremden Gewässern auswirken.

Effizienz: Inwieweit stand der Ressourcenaufwand für die SFPA in einem ausgewogenen Verhältnis zu den Ergebnissen der Intervention?

26. **Die ausgehandelten Fangmöglichkeiten standen seit 2015 in schwankendem Maße in einem angemessenen Verhältnis zu den Interessen der EU-Flotte, wie**

die Untersuchung der Nutzungsraten dieser Fangmöglichkeiten seitens der EU-Fischereifahrzeuge zeigt. Seit Anfang der 2000er Jahre wurden kontinuierlich Anstrengungen unternommen, um die Fangmöglichkeiten unter Berücksichtigung der Nutzung der verfügbaren Fangmöglichkeiten sowie weiterer Faktoren wie etwa – insbesondere im Fall der Thunfisch-SFPA – der Erhaltungsziele von Protokoll zu Protokoll anzupassen. Im Fall der Mehrarten-SFPA gibt es abgesehen vom Fall der Fangmöglichkeiten für kleine pelagische Arten in Mauretanien, die zwischen 2006 und 2015 um die Hälfte verringert wurden, weniger Belege für eine protokollindividuelle Anpassung bei Nichtausschöpfung der Fangmöglichkeiten. Trotz dieser Erkenntnis hat die Komponente „Zugangsrechte“ der SFPA zu einem positiven Kosten-Nutzen-Verhältnis für die EU-Investition geführt. Thunfisch-SFPA wiesen in der Regel ein überlegenes Kosten-Nutzen-Verhältnis gegenüber Mehrarten-SFPA auf, was für den ersten Fall eine bessere Anpassung des finanziellen EU-Beitrags an den Wert der genutzten Arten und/oder eine höhere Wirtschaftlichkeit im Hinblick auf die Ausschöpfung der ausgehandelten Fangmöglichkeiten nahelegt. Die Evaluierung hat ergeben, dass die SFPA keine angemessenen Bestimmungen für die Anpassung des finanziellen EU-Beitrags für Zugangsrechte für den Fall enthielten, dass eine niedrigere Ausschöpfung der Fangmöglichkeiten festgestellt wird, und dass nicht alle SFPA Bestimmungen zur Anpassung des finanziellen EU-Beitrags für Zugangsrechte in Reaktion auf grundlegende Änderungen der nationalen Politik vorsahen, die sich auf die einschlägigen Protokollbestimmungen niederschlugen.

27. **Der zur sektorbezogenen Unterstützung gezahlte EU-Beitrag wurde im Allgemeinen auf die Aufnahmekapazität der Partnerdrittländer ausgerichtet**, wie die in der Regel vollständigen Zahlungen des EU-Beitrags für die sektorbezogene Unterstützung belegen, die in den SFPA während der protokollgedeckten Zeiträume identifiziert wurden. Wo dies nicht der Fall war, sahen die SFPA protokollabhängige Anpassungen des EU-Beitrags zur sektorbezogenen Unterstützung oder Sonderbestimmungen vor, um zu gewährleisten, dass vor der Freigabe des im laufenden Protokoll genannten EU-Beitrags der im Rahmen eines Vorgängerprotokolls angegebene EU-Beitrag ausgeschöpft wird. **Eine Überprüfung der Umsetzung der verschiedenen SFPA hat jedoch gezeigt, dass die in den Leitlinien zur freiwilligen Umsetzung beschriebenen Zahlungsregeln nicht die vollständige technische Umsetzung der während der protokollgedeckten Zeiträume vereinbarten Mehrjahrespläne gewährleisten konnten**, was zur Folge hatte, dass in Erwartung einer vollständigen Umsetzung der Protokolle bestimmte Tätigkeiten gänzlich bezahlt waren, bevor die Protokolle ausliefen. Dies hat zudem Ungewissheit hinsichtlich der rechtlichen Bestimmungen über die Beobachtung dieser Tätigkeiten hervorgerufen. Diese Situation könnte auf die bis jüngst bestehende Flexibilität der SFPA-Bestimmungen hinsichtlich der Aufhebung von Mittelbindungen im Fall von Verzögerungen bei der technischen Umsetzung zurückzuführen sein. Darüber hinaus ergab die Evaluierung, dass Unklarheit über die rechtliche Zuständigkeit des europäischen Vertragspartners für die Ausübung der finanziellen Kontrollen der Verwendung des EU-Beitrags zur sektorbezogenen Unterstützung durch die Partnerdrittländer besteht. Für Partnerdrittländer mit mindestens einem Budgethilfevertrag, der im Rahmen des EU-Kooperationsprogramms umgesetzt wird, hat die Europäische Kommission bewertet, inwieweit die Verwaltung der öffentlichen Finanzen durch die Partnerdrittländer hinreichend transparent, zuverlässig und effizient ist, um die Verwendung des EU-Beitrags für die sektorbezogene Unterstützung zu gewährleisten.

Kohärenz: Das Zusammenspiel der SFPA-Interventionen mit anderen Maßnahmen

28. **Die über SFPA geleisteten EU-Interventionen standen im Einklang mit den anderen Interventionen der EU im Rahmen ihrer Gemeinsamen Fischereipolitik. So haben die SFPA die im Rahmen internationaler**

Organisationen vorangetriebenen EU-Maßnahmen auf kohärente Weise unterstützt, indem die Zugangsregeln an den seitens der RFO verabschiedeten Erhaltungs- und Bewirtschaftungsmaßnahmen ausgerichtet wurden, mit potenziellen Hebeleffekten auf weitere Flotten aufgrund der erwarteten Anwendung der Nichtdiskriminierungsklausel. Die im Rahmen der SFPA zur sektorbezogenen Unterstützung geleisteten EU-Hilfen haben dazu beigetragen, die Kapazitäten der Partnerdrittländer für die Einhaltung ihrer internationalen Verpflichtungen insbesondere im Indischen Ozean zu stärken. Die jüngst in ein SFPA (Seychellen) aufgenommene Bestimmung bezüglich der regionalen Zusammenarbeit hat die Rolle der SFPA bei der Förderung der internationalen Kooperation gestärkt. **Die über SFPA erfolgten Interventionen der EU haben** über die Stärkung der Beobachtungs-, Kontroll- und Überwachungskapazitäten der Behörden der Partnerdrittländer **die Umsetzung der IUU-Verordnung auf kohärente Weise unterstützt** und auf kohärente Weise die Nulltoleranzstrategie flankiert, die von der EU dadurch gefördert wird, dass die Europäische Kommission auf eigene Initiative von der Aushandlung von SFPA mit Drittländern absieht, die die ihnen im Rahmen der IUU-Vorabanzeigeverfahren zur Kenntnis gebrachten Vertragsverletzungen nicht korrigiert haben.

29. **Die SFPA haben die Umsetzung der EU-Agenda für eine internationale Governance der Ozeane und ihre Strategie „Vom Hof auf den Tisch“ auf kohärente Weise unterstützt**, indem sie eine nachhaltige Bewirtschaftung der kommerziell genutzten Bestände begünstigt haben, die in den Anwendungsbereich des Instruments fallen. Demgegenüber ist es über die SFPA weniger gut gelungen, zu den Zielen dieser übergeordneten Strategien beizutragen, was den Schutz der marinen Ökosysteme sowie die Anreize für Partnerdrittländer betrifft, die internationalen Übereinkünfte über die Ausbildung und die Arbeitsbedingungen im Fischereisektor zu ratifizieren. Ende 2020 hatte es über SFPA relativ wenige Interventionen in den Zweigen der blauen Wirtschaft außerhalb der traditionellen Fischerei- und Aquakultursektoren gegeben. SFPA stellen indes ein Instrument für die Umsetzung der Gemeinsamen Fischereipolitik der EU dar und müssen sich vor diesem Hintergrund auf die Maßnahmen konzentrieren, die in deren Anwendungsbereich fallen.

30. **Die im Rahmen der SFPA erfolgten EU-Interventionen standen im Einklang mit den Maßnahmen der EU im Entwicklungsbereich.** Bei der Evaluierung wurden zahlreiche Beispiele für **Synergien** zwischen den im Rahmen der SFPA-Komponente „sektorbezogene Unterstützung“ durchgeführten Maßnahmen und den auf einzelstaatlicher und regionaler Ebene im Rahmen der einschlägigen Kooperationsprogramme der EU umgesetzten Maßnahmen identifiziert. Überdies gibt es Beispiele für **Komplementarität**, wo Kooperationsprogramme der EU Bereiche anschnitten, die aufgrund der verfügbaren Mittel und/oder der gewählten Schwerpunkte nicht vom Anwendungsbereich der SFPA-Programme für die sektorbezogene Unterstützung abgedeckt waren, und umgekehrt. Darüber hinaus haben alle im Verlauf der Evaluierung befragten EU-Delegationen bestätigt, dass ein SFPA im Portfolio der EU-Tätigkeiten im Partnerdrittland hilfreich war, um die Fischerei bei der Behandlung von Querschnittsthemen wie Governance, Umwelt und Wirtschaftswachstum in den politischen Dialog aufzunehmen. Die Kohärenz wurde über regelmäßige Ad-hoc-Konsultationen gewährleistet. Mehrere EU-Delegationen haben jedoch angemerkt, dass keine förmlichen Mechanismen für diese Konsultationen bestanden.

31. **Die SFPA haben die Handelsagenda der EU im Hinblick auf bestimmte Drittländer auf kohärente Weise über Maßnahmen im Rahmen der Komponente „sektorbezogene Unterstützung“ zur Erleichterung des Handels unterstützt**, etwa über Interventionen zur Aufrechterhaltung oder Erlangung von Genehmigungen für die Ausfuhr von Fischereierzeugnissen in die EU und Interventionen zugunsten der Entwicklung und Modernisierung von Anlandestellen für Fisch zur Förderung des Marktzugangs. Vor dem Hintergrund der vorgesehenen Anwendung der

Nichtdiskriminierungsklausel wurde mit dem SFPA-System ein Instrument geschaffen, das zur Sicherstellung gleicher Ausgangsbedingungen für europäische und ausländische Fischereiflotten beiträgt, die den EU-Markt versorgen, was die vom Anwendungsbereich der SFPA abgedeckten Fangtätigkeiten betrifft.

EU-Mehrwert: Welcher Mehrwert ergibt sich aus den EU-Interventionen im Rahmen von SFPA?

32. **Die über SFPA erfolgten EU-Interventionen haben einen Mehrwert gegenüber dem geschaffen, was sich mit anderen Mitteln hätte erzielen lassen**, wobei anzumerken ist, dass die Aushandlung und Durchführung öffentlicher Fischereiabkommen gemäß dem Vertrag über die Arbeitsweise der EU der ausschließlichen Zuständigkeit der EU unterliegen. Mit den SFPA wurde ein solider mehrjähriger Rechtsrahmen für die Tätigkeiten von EU-Fischereifahrzeugen in den Gewässern von Partnerdrittländern geschaffen, der mit einem dedizierten Finanzinstrument für die Verwirklichung einer Partnerschaft zwischen der EU und den Drittländern ausgestattet ist, um die Umsetzung einer nachhaltigen Fischereipolitik zu unterstützen und die wirtschaftliche und soziale Entwicklung ihrer Fischereisektoren zu fördern.

Akzeptanz: Wie wurden die im Rahmen von FPA erfolgten Interventionen von den anvisierten Interessengruppen und/oder der Öffentlichkeit wahrgenommen?

33. **Die öffentliche Wahrnehmung der SFPA ist nach wie vor weitgehend auf die Zugangskomponente fokussiert, wobei die im Verlauf der Evaluierung eingeholten Reaktionen gemischte Akzeptanzniveaus seitens der Zivilgesellschaft in den Partnerdrittländern nahelegen.** Der positive Beitrag der im Rahmen der SFPA-Komponente „sektorbezogene Unterstützung“ erfolgten Maßnahmen wird von der begünstigten Zielgruppe und der Zivilgesellschaft in der EU wie in den Partnerdrittländern oft weitgehend verkannt. **Das Feedback auf die gezielten Befragungen, die im Rahmen der Evaluierung durchgeführt wurden, hat eine nahezu einstimmige Forderung der Interessenträger nach höherer Transparenz** bei der Umsetzung der SFPA-Komponenten „Zugangsrechte“ und „sektorbezogene Unterstützung“ als Grundlage für eine sachlich fundierte öffentliche Debatte und zur Stärkung der Rechenschaftspflicht der beiden Parteien **bestätigt**. Die Europäische Kommission hat einen eindeutigen Bedarf an angemessenen Kommunikations- und Sichtbarkeitsplänen für eine verbesserte Sensibilisierung der Öffentlichkeit für die als EU-Beitrag zur sektorbezogenen Unterstützung finanzierten Tätigkeiten identifiziert, wobei im Rahmen bestimmter jüngst ausgehandelter Protokolle entsprechende Maßnahmen eingeführt wurden.

SCHLUSSFOLGERUNG

34. **Insgesamt gelangt die Evaluierung zu dem Schluss, dass die SFPA ihrem Zweck** im Hinblick auf folgende Ziele **gerecht werden**: i) Beitrag zur Erhaltung der Ressourcen und zur ökologischen Nachhaltigkeit über eine rationale und nachhaltige Nutzung der in den Gewässern der Partnerdrittländer lebenden Meeresressourcen, ii) Beitrag zur Aufrechterhaltung der Tätigkeiten der EU-Fischereiflotten, die außerhalb der Unionsgewässer fischen, und zur hiermit verbundenen Beschäftigung, und iii) Förderung der Entwicklung eines nachhaltigen Fischereisektors in den Partnerdrittländern.
35. **Die insgesamt positive Bewertung der Leistung der SFPA wird von den folgenden Hauptschlussfolgerungen der Evaluierung untermauert:**
- Die SFPA haben ein zweckdienliches Instrument zur Erfüllung der Anforderungen und Ziele der verschiedenen Beteiligten (die EU, Eigner von EU-Fischereifahrzeugen

und die Partnerdrittländer) dargestellt. Die Abkopplung des EU-Beitrags gegen Zugang vom EU-Beitrag zur sektorbezogenen Unterstützung war sinnvoll, um eine separate Verwaltung der beiden Komponenten zu gewährleisten.

- Identifizierung der Fangmöglichkeiten für EU-Fischereifahrzeuge und ihre Anpassung im Zeitverlauf auf der Grundlage wissenschaftlicher Stellungnahmen, unter der Aufsicht der unabhängigen gemeinsamen Fachausschüsse im Rahmen der Mehrarten-SFPA
- Abstimmung der Zugangsbedingungen auf die Erhaltungs- und Bewirtschaftungsmaßnahmen, die von den betroffenen regionalen Fischereiorganisationen verabschiedet wurden, im Rahmen der Thunfisch-SFPA
- verhältnismäßige SFPA-Bestimmungen, die direkte wirtschaftliche Interaktionen zwischen der EU-Fischereiflotte und dem Fischereisektor der Partnerdrittländer vorschreiben oder fördern
- positive Beiträge der SFPA zum Ausbau der Beobachtungs-, Kontroll- und Überwachungskapazitäten der Partnerdrittländer, zur Durchführung von Forschungstätigkeiten zur Unterstützung des Fischereimanagements sowie gegebenenfalls zur Förderung der sozialen und wirtschaftlichen Entwicklung des Fischereisektors in den Partnerdrittländern
- eine verbesserte protokollindividuelle Abstimmung der ausgehandelten Fangmöglichkeiten auf den tatsächlichen Bedarf der EU-Fischereiflotte, insbesondere bei Thunfisch-SFPA
- zufriedenstellende Ausrichtung des zur sektorbezogenen Unterstützung geleisteten EU-Beitrags an der Aufnahmekapazität der Partnerdrittländer mit geeigneten Vorkehrungen zur Anpassung der Zahlungen, wo dies nicht der Fall war
- eine gute Kohärenz zwischen den im Rahmen der SFPA erfolgten Interventionen und den Maßnahmen, die im Rahmen der Kooperationsinitiativen der EU umgesetzt wurden, wie die erzielten Komplementaritäten und Synergien belegen
- ein eindeutiger Mehrwert der über SFPA durchgeführten EU-Interventionen gegenüber dem, was sich mit anderen Mitteln erzielen ließe

36. Die Evaluierung hat jedoch bestimmte Bereiche aufgezeigt, in denen die Leistung des Instruments insbesondere hinsichtlich seiner Umsetzung verbessert werden könnte. Es wurden im Wesentlichen die folgenden Handlungs- und Verbesserungsbereiche vorgeschlagen:

- verstärkte Berücksichtigung des Entwicklungsstatus des Partnerdrittlandes bei der Festlegung des finanziellen EU-Beitrags zur sektorbezogenen Unterstützung
- Überprüfung der ruhenden SFPA und Anstellung von Überlegungen dazu, wie sich der Unterbrechung von Fangtätigkeiten begegnen ließe, die sich aus der Ausschließlichkeitsklausel ergibt
- verbesserte Beobachtung der Anwendung der Nichtdiskriminierungsklausel und der Transparenzklausel seitens der Partnerdrittländer durch die Gemischten Ausschüsse; dies würde eine Ausdehnung der Normen der Gemeinsamen Fischereipolitik, denen die EU-Fischereifahrzeuge kraft der SFPA unterliegen, auf weitere Fischereiflotten sicherstellen, die Zugang zu den Gewässern der Partnerdrittländer haben
- Stärkung der wissenschaftlichen Beiträge bei der Gestaltung der ökosystemischen Maßnahmen und der förmlichen Festlegung von Überschüssen im Rahmen der Mehrarten-SFPA
- Harmonisierung der in den EU-Mitgliedstaaten und in den Partnerdrittländern verwendeten Vorlagen für den elektronischen Informationsaustausch zur Überwachung von Fischereifahrzeugen
- Aktualisierung der Sozialklausel, die die Arbeitsbedingungen an Bord der EU-Fischereifahrzeuge regelt, um die geltenden internationalen Normen besser widerzuspiegeln, und Festlegung von Mechanismen zur Kontrolle ihrer Umsetzung
- Erweiterung der SFPA um Bestimmungen, die eine Anpassung der finanziellen Gegenleistung der EU für Zugangsrechte im Fall einer geringen Ausschöpfung der

Fangmöglichkeiten und/oder im Fall einer Änderung der technischen Bedingungen erlauben, die sich auf die operationelle Kapazität der EU-Flotte zur Ausschöpfung der eingeräumten Fangmöglichkeiten auswirkt

- verstärkte Fokussierung auf die Bewertung der technischen und operationellen Errungenschaften, die der Umsetzung des EU-Beitrags zur sektorbezogenen Unterstützung im Zeitverlauf zu verdanken sind
- Ausstattung der europäischen Partei mit eindeutigen rechtlichen Zuständigkeiten, um die vom Partnerdrittland geltend gemachten Ausgaben bezüglich der Verwendung des finanziellen EU-Beitrags zur sektorbezogenen Unterstützung gegebenenfalls überprüfen zu können
- Festlegung interner Mechanismen für die Koordinierung der beteiligten Dienststellen der Europäischen Kommission, um die Kohärenz zwischen den SFPA und den anderen EU-Interventionen mit Auswirkungen für die Partnerdrittländer zu verstärken
- Überlegungen über die Aufnahme einer Bestimmung in die SFPA, die die Partnerdrittländer dazu anhält, keine Fangerlaubnisse an Fischereifahrzeuge zu vergeben, die die Flagge eines Drittlands führen, das von der EU als nicht mit der Bekämpfung der illegalen, nicht gemeldeten und unregulierten Fischerei kooperierend eingestuft wurde
- Verbesserung der öffentlichen Transparenz und Kommunikation über die Ergebnisse und Auswirkungen der Umsetzung der SFPA-Komponenten „Zugangsrechte“ und „sektorbezogene Unterstützung“

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Introduction

Background to SFPAs

Bilateral fisheries agreements between the EU and third countries have long been a feature of the Common fisheries Policy (CFP). The 2002 reform of the external dimension of the CFP signalled the end of the exclusively commercial nature of fisheries agreements and the start of a new approach based on Fisheries Partnership Agreements (FPA), which considered access to fishing opportunities in the light of the best scientific advice available and implementation of actions to promote the sustainable development of fisheries through sectoral support. This was further underpinned by the Council's conclusions of July 2004 on Fisheries Partnership Agreements with third countries²¹.

In July 2011, the Commission adopted a Communication on the external dimension of the CFP²² and proposed several actions to transform FPAs into Sustainable Fisheries Partnership Agreements (SFPAs), focusing on resource conservation and environmental sustainability, improved governance, and effectiveness of sectoral support. The Council adopted conclusions regarding the External Dimension of the Common Fisheries Policy (CFP) on 19 March 2012²³ and the European Parliament expressed its views in a report adopted in November 2012²⁴. The new framework for SFPAs²⁵ was laid down in Articles 28, 31 and 32 of the basic CFP (EU) Regulation 1380/2013²⁶. Based on Council conclusions (2004 and 2012) and the relevant articles of the CFP (EU) Regulation 1380/2013, general and specified objectives of SFPAs can be defined as follows:

Box1: General and specific objectives of Sustainable Fisheries Partnership Agreements

The overarching objective of the external dimension of the CFP is to promote high standards in terms of fisheries management at the international and regional levels as well under bilateral agreements with the aim to ensure a level playing field. General and specific objectives of SFPAs are the following:

- To contribute towards resource conservation and environmental sustainability through rational and sustainable exploitation of living marine resources of the coastal state, in particular by:
 - ✓ directing fisheries exclusively at surplus resources and preventing the overfishing of stocks, on the basis of the best scientific advice and reinforced transparency on the global fishing efforts in third countries' waters;
 - ✓ following the same principle and promote the same standards for fisheries management as applied in EU waters;

²¹ Council conclusions on a Communication from the Commission on an integrated framework for fisheries partnership agreements with third countries - 11485/1/04 15 July 2004

²² COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS on External Dimension of the Common Fisheries Policy. (COM/2011/0424 final)

²³ Council conclusions on a Communication from the Commission on the External dimension of the Common Fisheries Policy – 3155th Agriculture and Fisheries Council meeting – 19 and 20 March 2012

²⁴ European Parliament report on the external dimension of the Common Fisheries Policy Procedure 2011/2318 INI (2012)

²⁵ According to Article 4.37 of the CFP Regulation (EU) 1380/2013, Sustainable Fisheries Partnership Agreement (SFPAs) means “an international agreement concluded with a third state for the purpose of obtaining access to waters and resources in order to sustainably exploit a share of the surplus of marine biological resources, in exchange for financial compensation from the Union, which may include sectoral support”.

²⁶ Regulation (EU) No 1380/2013 of the European Parliament and of the Council of 11 December 2013 on the Common Fisheries Policy, amending Council Regulations (EC) No 1954/2003 and (EC) No 1224/2009 and repealing Council Regulations (EC) No 2371/2002 and (EC) No 639/2004 and Council Decision 2004/585/EC. OJ L 354, 28.12.2013, p. 22–61

- ✓ improving the scientific and technical evaluation of the fisheries concerned (notably by improving data collection and transparency on fishing efforts);
- ✓ ensuring compliance and combating illegal, unreported and unregulated (IUU) fishing;
- To contribute to continuing the activity of the Union fleets and the employment linked to the fleets operating within SFPAs by:
 - ✓ seeking appropriate share of the surplus resources, fully commensurate with the EU fleets interests;
 - ✓ ensuring that the level of fees payable by Union ship-owners for their fishing activities is fair, non-discriminatory and commensurate to the benefits provided through the access conditions while avoiding any discriminatory treatment towards EU vessels and promoting a level playing field among the different fleets;
 - ✓ ensuring supply for the EU and for the markets of certain developing countries;
 - ✓ encouraging the creation of a secure environment that is favourable to private investment and economic activities;
 - ✓ taking into account the specific interests of the Union's outermost regions located in the vicinity;
- To support the development of a sustainable fisheries sector in partner countries by:
 - ✓ contributing to the capacity building in the third countries (notably by improving fisheries legal framework, control and surveillance and science);
 - ✓ promoting the employment of local seamen, improving infrastructures and encouraging landings, supporting the third country in developing local fisheries and processing industry.

Source: DG MARE - terms of reference

The identification of SFPAs objectives in their broader policy context and the tools and mechanisms foreseen by SFPAs and their implementing multi-annual Protocols underpinned the preparation of a reconstructed intervention logic of EU interventions under SFPAs, as shown in Annex 2.

Purpose of the evaluation

The objective of this evaluation study is to provide DG MARE with an overall analysis of the SFPAs features, content, implementation, results and impacts. The results of the evaluation are expected to help the Commission to understand what has worked well, be considered of added value or a success story and, for what has not worked well, why and what could have been a suitable alternative option.

More specifically, the terms of reference of the assignment required the evaluation to assess:

- the fit for purpose and added value of the SFPAs based on the governance framework, the socio-economic and environmental benefits and impacts that they create in the EU and in third countries. In that context it evaluates the effectiveness of SFPAs, notably the extent to which the objectives of i) the Regulation (EU) No 1380/2013 on the CFP, ii) the Communication on the external dimension of the CFP and the following 2012 Council conclusions, iii) the agreements and their implementing protocols, are met;
- the extent to which the expected objectives and results fulfil the needs and expectations of EU in its different dimensions, including the EU fleet and the fisheries industry as well as local population, the partner countries, including on the distribution of the EU financial compensation between the access to the resource component and the sectoral support component;
- the overall global, regional and type of agreement coherence of the current SFPAs network, in terms of policy orientations as well as in terms of concrete implementation and the overall coherence with other EU relevant policies , including

the impact of SFPAs on EU Outermost Regions neighbouring SFPAs countries, and with the policies and intervention of other international organisations involved in fisheries;

- the contribution of the SFPAs to development and reinforcement of the technical and scientific capacity of partner countries and their impact on the local fisheries sectors, on food security, trade relations with the EU; assess the SFPAs' contribution towards combating IUU fishing in third countries;
- the sectoral support component including the programming process, the main types of activities carried out, their results, impacts, and effectiveness within the sector and in related policy areas,
- the perception in terms of appreciation of SFPAs and their actions;
- the relevance of SFPAs and their sectoral support with respect to the EU needs and objectives.

Scope of the evaluation

- In terms of temporal scope, the evaluation concentrates on interventions in the framework of SFPAs between 2015 and 2020, with considerations of earlier periods of time where relevant to inform the analysis. The temporal scope of the evaluation prevented consideration of developments in 2021.
- In terms of geographical scope, the evaluation focuses on the seventeen partner third countries for which a Protocol implementing the SFPAs was active during any period of time over 2015 to 2020²⁷ with consideration of their broader regional context where relevant to inform the analysis.

Note that this evaluation focuses on the EU interventions through SFPAs at a policy level. **This evaluation is not intended to replace or to update the ex-post evaluations implemented for each Protocol according to Article 31.10 of the CFP Regulation (EU) 1380/2013.**

1 Method / Process followed

1.1 Collection and analysis of relevant information (published and unpublished)

1.1.1 Published information

The identification of public documents of potential relevance for use in the evaluation started during the inception phase and was continued on an ongoing basis during the evaluation. The list of documents collected and reviewed is presented in Annex 14.

1.1.2 Unpublished information

A list of unpublished documents required to inform the evaluation was submitted to DG MARE at the beginning of the evaluation. The documents included *inter alia* data on catch and utilisation of fishing opportunities, the minutes of the different Joint Committees, the annual and multi-annual programmes implementing the EU contribution for sectoral support, and the reports on implementation of the sectoral support submitted by partner third countries.

²⁷ By alphabetical order: Cabo Verde (2014-2018 and 2019-2024), Comoros (2014-2016), Cook Islands (2016-2021), Côte d'Ivoire (2013-2018 and 2018-2024), Gabon (2013-2016), Guinea Bissau (2014-2017 and 2019-2024), Greenland (2013-2015 and 2016-2020), Kiribati (2012-2015), Liberia (2015-2020), Madagascar (2015-2018), Mauritania (2015-2021), Mauritius (2014-2017 and 2017-2021), Morocco (2014-2018 and 2019-2023), São Tomé-et-Príncipe (2014-2018 and 2019-2024), Senegal (2014-2019 and 2019-2024), Seychelles (2014-2020 and 2020-2026), The Gambia (2019-2025)

About 600 different files were received. All files were checked to review their content and to assess their relevance to the evaluation. On 12 March 2021, a note was sent to DG MARE to list the information provided and to require transmission of potentially missing information. Additional documents were subsequently received and reviewed. In-depth analysis of non-public documents started in April 2021.

1.2 The Public Consultation

A draft questionnaire for the Public Consultation was prepared during the inception phase of the assignment and presented in the inception report. The questionnaire included two sections: a first section with general questions for respondents without a detailed knowledge of SFPAs, and a second optional section aimed at respondents with a more in-depth knowledge of the instrument. The final version of the questionnaire was translated into the different EU languages by the Commission, and the Public Consultation published on the "Have your Say" page of the Better Regulation website on 31 March 2021 with opportunities for stakeholders to submit contributions until 23 June 2021. The questionnaire for the Public Consultation can be accessed [here](#).

Twenty-three respondents participated in the Public Consultation, of whom 15 (65%) also responded to the specialised questions. The 23 respondents represented 18 EU Member States (78%) and 5 (22%) non-EU countries (Cabo Verde, Iceland, Namibia, Senegal and Turkey) of which two (Cabo Verde and Senegal) are a partner country of the EU within the framework of an SFPA. Contributions were given in majority as EU citizen (30%, 7 out of 23) and Academic/Research institutions (26%, 7 out of 23).

A factual summary of the results of the Public Consultation is provided in Annex 15.

Before the Public Consultation, DG MARE published the roadmap for the evaluation on the Better Regulation website between 28 January 2021 and 25 February 2021. The consultation on the roadmap attracted 13 contributions, mainly from NGOs. Full results of the consultation on the roadmap can be accessed [here](#).

1.3 The targeted consultations

1.3.1 Mapping of stakeholders

A preliminary mapping of stakeholders was prepared during the inception phase. Stakeholders with an interest in SFPAs can be classified into three categories:

Category 1: Stakeholders in charge of the implementation of SFPAs

- DG MARE and fisheries attachés in the third countries.
- Competent authorities in the EU Member States in charge of the monitoring of the activities of their flag vessels using fishing opportunities negotiated.
- Competent authorities in the partner third countries in charge of the implementation of the SFPAs.
- Research institutes in the EU Member States and in the third countries involved in the joint scientific committees created under SFPAs.

Category 2: Stakeholders impacted by SFPAs

- Associations of EU shipowners utilising fishing opportunities available under SFPAs.
- Associations representing the fishing industry (capture and processing sectors) in the partner third countries.
- Trade Unions representing fishers.
- Small-scale fishery organisations and fish workers in third countries.

Category 3: Stakeholders having a stated interest in SFPAs

- Delegations of the European Union in the partner third countries.
- EU advisory councils (Long-Distance AC, Market AC).
- Non-governmental organisations with a stated interest in SFPAs and in the development of the fisheries sector in the third countries.
- International donors active in the fisheries sector in partner coastal states either at national or at regional levels.
- Regional Fisheries Bodies.

1.3.2 Implementation of the targeted consultations

The consultation took place by sending customised questionnaires to the stakeholders identified during the inception phase. The different questionnaire templates presented in the inception report in French were translated into English, Spanish and where appropriate, into Portuguese. The targeted consultation period ran from March 2021 to July 2021.

About 160 stakeholders were approached to answer the questionnaires and nearly 80 stakeholders provided feedback to the consultation. The list of entities contacted and an indication on whether they responded can be found in Annex 17. The following points summarise the status of contributions received:

- Concerning public authorities ('management authorities') from third countries, Côte d'Ivoire, Greenland, Guinea Bissau, Liberia, Madagascar, Mauritius, Morocco, Senegal, and Seychelles responded to the consultation, while in EU Member States responses were received from Denmark, Estonia, Germany, Greece, Italy, Lithuania, Netherlands, Poland and Spain.
- Most EU associations of fishing operators responded. Some contributions were received from operators in the fishing sector in third countries (Côte d'Ivoire, Guinea Bissau, Madagascar, Mauritania, and The Gambia).
- The EU NGOs having an interest in SFPAs contributed to the evaluation, as well as some NGOs based in the partner third countries (Cabo Verde, Madagascar, The Gambia).
- Scientific experts from Spain and from Mauritania, Morocco, and Senegal involved in the Joint Scientific Committees responded.
- All EU Delegations in the third countries with an SFPA responded. Fisheries attachés also contributed through written replies to the questionnaires and through video calls.
- The evaluation team had exchanges of views with the Long Distance Advisory Council and the Market Advisory Council during (virtual) meetings of relevant working / focus groups.

A summary of feedback received under the targeted consultation programme is shown in the synopsis report on consultation results and feedback in Annex 16.

1.4 Steering of the evaluation

The implementation of this evaluation of SFPAs was overseen by an Interservice Steering Group (ISG) composed of representatives of the European Commission (DG MARE, DG TRADE, DG INTPA, DG NEAR, Secretariat-General) and of the European External Action Service. The main interactions between the contractors and the ISG took place during:

- A kick-off meeting held on 12 January 2021 after contract signature on 17 December 2020.
- An inception meeting held on 12 March 2021 to discuss the methodology and the workplan presented in an inception report submitted on 12 February 2021.
- A meeting held on 12 July 2021 to discuss the interim findings presented in an interim report submitted on 18 June 2021.

- A meeting held on 25 October 2021 to discuss the draft final report submitted on 1 October 2021.

Members of the ISG provided written comments on each of the deliverables cited above.

1.5 Main limitations to the evaluation

Concerning the access component of SFPAs, most information of potential use to the evaluation was successfully collected, with relevant feedback provided by the stakeholders approached in the framework of the targeted consultation programme. Quantitative data on access were swiftly provided by DG MARE through queries of internal databases containing continuously updated information on *inter alia* the number of fishing authorisations issued and the catch of EU vessels within the framework of SFPAs.

Concerning the sectoral support component of SFPAs, the research carried out was hindered by the complexity of the documentation provided by DG MARE on the implementation of the sectoral support²⁸, compounded by a lack of written records on the implementation of certain sectoral support annual programmes, or the limited amount of information in reports available. In addition, feedback from stakeholders on the implementation of the sectoral support component was relatively minimal due to i) a low level of engagement with the evaluation by beneficiary institutions in certain partner third countries approached during the targeted consultation programme, and ii) a frequently reported lack of detailed knowledge of the sectoral support activities by the different categories of stakeholders not directly involved in the management of the sectoral support (e.g. civil society and fishing operators in the EU and in the partner third countries). The restrictions on international travel that prevailed during the evaluation period as a result of the COVID pandemic prevented fact-finding missions to the partner third countries.

As a result, information on the activities implemented under the sectoral support component of the different SFPAs was gathered at various levels of granularity, but partial information was available on the outcomes of the activities (i.e. what were the immediate results of the activities) and on their impacts (i.e. the long-term changes induced by the activities). This limited the ability of the consultants to provide a fully comprehensive evaluation of the effectiveness of the sectoral support.

Finally, the relatively low number of contributions received through the Public Consultation (23 in total) meant that the views presented can not necessarily be taken as being fully representative of all stakeholders, except perhaps where there was a consensus in the views provided.

²⁸ *Inter alia* the various successive versions of the multi-annual and annual programmes, implementation reports submitted by third countries, minutes of the meetings of the Joint Committees

2 Overview of SFPAs concluded between the EU and partner third countries

2.1 Broad characteristics of the SFPAs concluded with partner third countries

At the end of 2020, there were thirteen SFPAs with active implementing Protocols, and seven SFPAs without (the so-called dormant agreements). There are two categories of SFPAs:

- The SFPAs considering only access to the stocks of highly migratory species in the waters of partner third countries. Highly migratory species are defined in Annex 1 of the United Nations Convention on the Law of the Sea (UNCLOS). Highly migratory species include tuna and tuna-like species, marlins and billfish species and some oceanic shark species. By convention, these SFPAs are designated as 'tuna' SFPAs.
- The SFPAs considering access to different types of commercial species in the water of the partner countries. The species covered by these SFPAs consider access to small pelagic species (e.g. sardines, horse mackerel), demersal fish species (e.g. hake), crustacea species (e.g. shrimps, crabs), cephalopods species (e.g. octopus, squids) and highly migratory species. By convention, these SFPAs are designated as 'multispecies' SFPAs.

Note: the SFPAs concluded with Senegal and The Gambia straddle these two categories. Their major focus is access to the stocks of highly migratory species, but they also include limited fishing opportunities for hake. By convention, these SFPAs are included in the scope of tuna SFPAs.

Table 1: List of SFPAs with an active implementing Protocol at the end of 2020

Ocean	Multispecies SFPAs	Tuna SFPAs
North-East Atlantic	Greenland (GRN)	
Central Eastern Atlantic Ocean	Guinea-Bissau (GNB) Mauritania (MRT) Morocco (MOR)	Cabo Verde (CPV) Cote d'Ivoire (CIV) The Gambia (GMB) Liberia (LIB) São Tomé-et-Príncipe (STP) Senegal (SEN)
Indian Ocean		Mauritius (MUS) Seychelles (SYC)
Pacific Ocean		Cook Islands (COK)

Source: DG MARE website consulted 01.12.2020

At the end of 2020, dormant SFPAs (those without an implementing Protocol in force) included the SFPAs concluded with Equatorial Guinea (GNQ), Federated States of Micronesia (FSM), Gabon until 2021 (GAB)²⁹, Kiribati (KIR), Madagascar (MAD), Mozambique (MOZ), and Solomon Islands (SLB). All were formerly implemented as tuna SFPAs. The SFPAs with Gabon is in provisional application since 29 June 2021 following successful negotiation of a new Protocol in 2020. DG MARE is considering reactivating negotiations with Kiribati, Madagascar and Mozambique in the course of 2021 or 2022. There is currently no established timeline for the negotiation of new Protocols with Equatorial Guinea, Federated States of Micronesia and Solomon Islands.

²⁹ The SFPAs with Gabon became active in 2021 following the entry into force of a new Protocol on 29 June 2021 for a period of five years

For all current partner third countries bordering the Atlantic Ocean and the Indian Ocean, there is a long history of fishing agreements concluded with the EU, often starting in the 1980's or early 1990's following adoption in 1982 of the concept of a 200 nautical mile exclusive economic zone (EEZ) through the United Convention on the Law of the Sea (UNCLOS). For partner third countries in the Western Central Pacific Ocean, conclusions of fishing agreements with the EU are more recent (from the early 2000's) and concomitant with the development of EU fishing activities in this region. Annex 4 shows a graphical summary of the occurrence of implementing Protocols over time since the early 80's. For the partner third countries in the Atlantic and in the Indian Ocean, the agreements allowing access for EU vessels have been virtually uninterrupted, with some exceptions (e.g. access to Gambia interrupted between 1996 and 2019, access to Senegal interrupted between 2006 and 2014, and access to Equatorial Guinea interrupted since 2002). It is also noted that the portfolio of countries under SFPAs has remained almost the same for several decades. There has been only one entrant (Liberia) in the EU portfolio of SFPAs in the Atlantic and Indian oceans since the early 1990s³⁰.

2.2 Interlinkages between SFPAs and other EU Regulations implementing the Common Fisheries Policy

Two EU Regulations have a direct effect on implementation of SFPAs: i) the IUU Regulation and ii) the SMEFF Regulation.

2.2.1 The IUU Regulation

The IUU Regulation (EU) 1005/2008³¹ establishes that all countries, whether Member States or non-EU countries, have a responsibility to fulfil their international obligations as flag, port, coastal or market States. The following provisions of the IUU Regulation have a direct effect on the implementation of SFPAs:

- For partner third countries identified as non-cooperating third countries (red card) and subsequently listed by the Council, the Commission must propose the denunciation of any standing SFPA. Furthermore, the Commission cannot enter into negotiations to conclude SFPAs with such countries (Article 38). The application of these provisions led to denunciation in 2018 of the SFPA concluded with Comoros in 2006. This followed the listing by the Council in 2017 under the IUU regulation, coincidentally just after the expiration of the 2014-2016 Protocol.
- For partner third countries notified of the possibility of being identified as non-cooperating third country (yellow card), the IUU Regulation does not consider specific provisions in relation to SFPAs. However, the Commission adopted the political decision of refraining from negotiating SFPAs or new implementing Protocols under existing SFPAs with such third countries, in coherence with the zero-tolerance approach to IUU fishing. The political decision led to suspending negotiations of new Protocols implementing the SFPAs concluded with Kiribati until the yellow card was lifted in 2020, and with Liberia until the yellow card notified in 2017 is lifted. The political decision also prevents negotiations with potential candidates for an SFPA such as Sierra Leone and Ghana until the lifting of the yellow cards notified in 2016 and 2021 respectively. The yellow card notification does not entail suspension or termination of ongoing Protocols / SFPAs.

³⁰ Nevertheless, the Commission considers negotiation of SFPAs with Tanzania and Kenya, and implemented ex-ante evaluations in this respect

³¹ Council Regulation (EC) No 1005/2008 of 29 September 2008 establishing a Community system to prevent, deter and eliminate illegal, unreported and unregulated fishing, amending Regulations (EEC) No 2847/93, (EC) No 1936/2001 and (EC) No 601/2004 and repealing Regulations (EC) No 1093/94 and (EC) No 1447/1999. OJ L 286, 29.10.2008, p. 1–32

- The IUU Regulation provides a framework for informal dialogue between the EU and third countries not subject to notification procedures (yellow card or red card). Information received from DG MARE indicates that an IUU informal dialogue is ongoing with several third countries, including SFPA partner third countries. For third countries subject to a yellow or a red card, the dialogue is formal.

In addition, all SFPAs include a clause prompting the two parties to cooperate for combating IUU fishing.

2.2.2 The SMEFF Regulation

Regulation (EU) 2017/2403³² on the Sustainable Management of External Fishing Fleets (SMEFF) covers all possible types of fishing external to the EU's waters, whether it takes place within the framework of an SFPA or a RFMO, under direct authorisation, or in unregulated high seas areas. The following provisions of the SMEFF Regulation have a direct effect on the implementation of SFPAs.

- Article 9 of the SMEFF Regulation prohibits EU vessels from carrying out fishing operations in waters of a third country on stocks managed by a RFMO if that third country is not a contracting party to that RFMO. This provision probably incentivised Liberia, Guinea Bissau and The Gambia to join the ICCAT in 2014, 2016 and 2019 respectively.
- The SMEFF Regulation provides competence to the European Commission to exercise controls over the process of issuance of fishing authorisations (ex-ante control) and some level on control in relation to violations of the applicable conditions to fish (ex-post control) (Article 7, 10 and 11).
- The SMEFF Regulation (Article 12 and 13) provides mechanisms for the Commission to ensure optimal utilisation of fishing opportunities negotiated by EU vessels through adaptation of the allocation of the distribution between Member States decided by the Council upon entry into force of the Protocols.
- Article 39 of the SMEFF Regulation provides for the creation of a database of fishing authorisations, part of which is to be made public. Accordingly, the European Commission publishes a list of fishing vessels operating under SFPAs on its website³³.

Other EU Regulations implementing the EU Common Fisheries Policy apply to fishing vessels wherever they operate, including in the waters of partner third countries within the framework of SFPAs. In early 2021, these EU Regulations included in particular: i) the Control Regulation (EC) 1224/2009³⁴ laying down rules and measures for control, inspection and enforcement which apply also on fishing activities deployed in the waters of partner third countries; ii) the Data Collection Regulation (EU) 2017/2014³⁵ which requires

³² Regulation (EU) 2017/2403 of the European Parliament and of the Council of 12 December 2017 on the sustainable management of external fishing fleets, and repealing Council Regulation (EC) No 1006/2008. OJ L 347, 28.12.2017, p. 81–104

³³ https://ec.europa.eu/oceans-and-fisheries/fisheries/international-agreements/fishing-outside-eu_en (consulted 24.07.2021)

³⁴ Council Regulation (EC) No 1224/2009 of 20 November 2009 establishing a Community control system for ensuring compliance with the rules of the common fisheries policy, amending Regulations (EC) No 847/96, (EC) No 2371/2002, (EC) No 811/2004, (EC) No 768/2005, (EC) No 2115/2005, (EC) No 2166/2005, (EC) No 388/2006, (EC) No 509/2007, (EC) No 676/2007, (EC) No 1098/2007, (EC) No 1300/2008, (EC) No 1342/2008 and repealing Regulations (EEC) No 2847/93, (EC) No 1627/94 and (EC) No 1966/2006. OJ L 343, 22.12.2009, p. 1–50

³⁵ Regulation (EU) 2017/1004 of the European Parliament and of the Council of 17 May 2017 on the establishment of a Union framework for the collection, management and use of data in the fisheries sector and

mandatory provision of scientific data on fish stocks exploited in the waters of partner third countries; and iii) the EMFF (EU) Regulation 504/2014³⁶ (which includes support for temporary cessation measures in case on non-renewal of SFPAs or Protocols thereto).

2.3 Payments to partner countries under SFPAs

EU payments to partner countries under SFPAs comprise three components:

- An EU public financial contribution to cover part of the access costs of EU fishing vessels to the fishing areas and fisheries resources of the partner third country (the EU contribution to the access component);
- An EU public financial support for promoting responsible fishing and the sustainable exploitation of fisheries resources in the waters of the partner third country (the EU contribution to the sectoral support component);
- Payments by EU shipowners benefiting from available fishing opportunities to cover the part of the access costs not covered by the EU public financial contribution referred to above (the EU shipowners contribution to access component).

2.3.1 The EU contribution to the access component

The EU contribution to the access component is related to the amount of fishing opportunities negotiated for EU vessels.

For tuna agreements, the EU contribution is generally based on the identification of a reference tonnage multiplied by the part of the access cost to tuna resources borne by the EU public budget. The reference tonnage reflects the likely amount of EU catch of tuna species in the waters of the partner country considering historical records. It is linked to the relative abundance of tuna resources in national waters, which depends on a number of factors such as the area of the EEZ or its latitudinal location. The reference tonnage is not a catch limit (e.g. a quota). Catch in excess of the reference tonnage triggers additional EU access payments to the partner third countries.

The following table shows the unit value (EUR/tonne) for access to tuna resources considered under the different Protocols, and the part of these unit values paid by the EU as contribution to access. Since 2015, the total unit value for access to tuna resources has increased from EUR 100-115 / tonne (depending on Protocols) to EUR 120-140 / tonne. The part of this unit value borne by the EU slightly increased from 45-65 EUR / tonne to EUR 45-70 / tonne over the same 2015-2021 period. At least since 2006 and until 2014, the total unit value for access to tuna resources was uniformly set at EUR 100 / tonne, with EUR 75 / tonne borne by the EU.

Table 2: Unit value paid by the EU for access to tuna stocks in the waters of partner third countries

(EUR/tonne)	2015	2016	2017	2018	2019	2020	2021
Unit value (total)	100-115	100-115	100-120	100-120	115-125	115-140	120-140
of which EU pays :	45-65	45-65	45-65	45-65	45-70	45-70	45-70

Source: SFPA implementing Protocols

support for scientific advice regarding the common fisheries policy and repealing Council Regulation (EC) No 199/2008. *OJ L 157, 20.6.2017, p. 1–21*

³⁶ Regulation (EU) No 508/2014 of the European Parliament and of the Council of 15 May 2014 on the European Maritime and Fisheries Fund and repealing Council Regulations (EC) No 2328/2003, (EC) No 861/2006, (EC) No 1198/2006 and (EC) No 791/2007 and Regulation (EU) No 1255/2011 of the European Parliament and of the Council. *JO L 149 20.5.2014, p. 1–66*

For multispecies agreements, the EU contribution for access is a global financial package resulting from a negotiation with the partner country, taking into account the amount and value of fish stocks included in the fishing opportunities negotiated. The basis for setting the value of the access component borne by the EU, such as quantities multiplied by unit access costs by fish stocks, is not detailed in the Protocols. For all SFPAs but one, the fishing opportunities negotiated correspond to the fishing opportunities available to the EU fishing fleet in the waters of the third country. The exception is Greenland where part of the fishing opportunities negotiated are subsequently transferred by the EU to other third countries (e.g. Norway, Faroes) in exchange for fishing quotas in their waters³⁷.

EU payments for access are released on an annual basis. If actual utilisation of fishing opportunities by EU vessels has been less or equal to the maximum levels of fishing opportunities available, EU access payments are paid in full without prejudice to adaptations agreed by the two parties during the Protocols. According to the relevant provisions of SFPAs, if actual utilisation of fishing opportunities by EU vessels has exceeded the maximum levels of fishing opportunities available within the margins allowed by the Protocols, EU access payments are increased on the basis of the provisions of the Protocols.

A horizontal principle is that partner third countries have full discretion regarding the use of the EU contribution for access. The SFPA concluded between the EU and Morocco in 2019 is an exception with the Protocol mandating a fair geographical and social distribution of the socioeconomic benefits derived from the EU contribution for access, and requiring Morocco to report on this to the joint committee.

2.3.2 The EU contribution to the sectoral support component

Unlike the EU contribution to the access component which has to be commensurate with fishing opportunities negotiated based on Council Conclusions and the proportionality principle governing EU budget rules, there are no political orientations or legislative rules governing the identification of EU investment in the sectoral support component of SFPAs other than an alignment of the sectoral support envelope with the needs and absorption capacity of the partner third countries.

The following figure shows the proportion of the sectoral support envelope in the total EU contribution committed for SFPAs active by the end of 2020, and for SFPAs that were active in 2015. The EU does not implement a contribution to sectoral support in the framework of dormant SFPAs.

³⁷ For details on quota exchanges, see the ex-post evaluation of the SFPA between the EU and Greenland (2016-2020), page 65 (listed in the list of documents consulted in Annx 14)

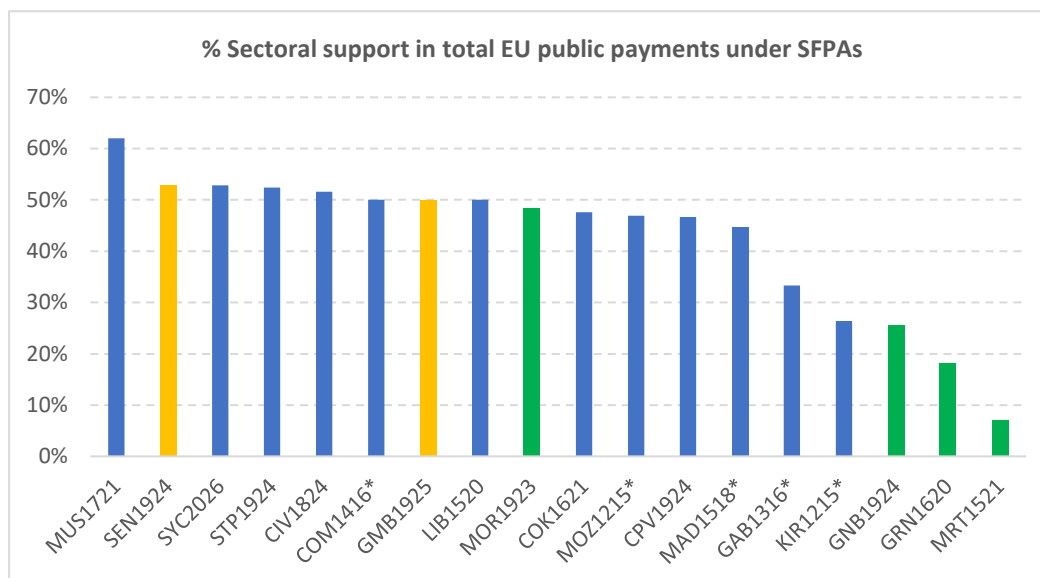


Figure 1: % sectoral support envelope in total EU public payments to partner third countries.

Source: SFPA implementing Protocols at end of 2020

Note: green bars: multispecies SFPAs, blue bars: tuna SFPAs, orange bars: tuna SFPAs with a hake component

The proportions shown are those applying at the start of the Protocols. They may change during the Protocols depending on relevant provisions

* : expired Protocols

Labels refer to the Protocols. For example, MUS1721 refer to the Protocol implementing the SFPA concluded with Mauritius between 2017 and 2021

A review of the different implementing Protocols concluded over the last ten years shows that in practice, there is an upper limit to the amount dedicated to sectoral support equivalent to the value of access costs borne by the EU, meaning that on average, total EU public contribution under SFPAs is 50% for access costs and 50% for sectoral support. This proportion of sectoral support relative to access may be slightly exceeded as evidenced by Protocols recently concluded³⁸. The Protocols may also consider a lower sectoral support envelope in proportion to the access component. This has happened mostly for multispecies agreements entailing a high associated EU financial compensation potentially exceeding the absorption capacity of the partner country evidenced in some cases by difficulties experienced under previous Protocols (i.e. Guinea Bissau and Mauritania).

According to EU Council conclusions (2012) and Article 32.1 of the CFP Regulation, EU public payments for sectoral support are conditional upon the achievements of specific results. The rules for implementation of this overarching principle are agreed upon between the European Commission and the partner third country through the Protocols and through implementing guidelines as appropriate. These rules may be adapted to the contexts and to the outcomes of bilateral negotiations.

In summary, implementation of the sectoral support starts with an identification by the two parties of a range of activities selected to support development objectives tabled in the national sectoral strategies. The sectoral support activities are listed in a multiannual sectoral support matrix with for each activity specific budgets, performances indicators and sources of verification for the indicators as appropriate. The details of the multiannual sectoral support matrix are agreed bilaterally during the meetings of the Joint Committees. The Protocols are limited to the identification of priorities to be supported in broad terms. Each year, the results of the implementation of the sectoral support are assessed by the

³⁸ Cote d'Ivoire 2018-2024, Mauritius 2017-2021, São Tomé-et-Príncipe 2019-2024, Senegal 2019-2024, Seychelles 2020-2026

Joint Committee and a decision is made on the amount of the EU public contribution to be released based on the conclusions of the assessment.

According to EU Council conclusions and Article 32.2 of the CFP Regulation, EU public payments for access and EU public payments for sectoral support are decoupled. The decoupling has been progressively introduced over time since 2014. Before 2014, both types of EU public contributions were considered as a single EU public contribution, with mechanisms foreseen in the Protocols to suspend or revise the part of the EU single public contribution earmarked for sectoral support if results obtained were not aligned with the programming.

2.3.3 Payments by EU shipowners to cover part of access costs

SFPAs implementing Protocols define the amounts of access fees to be paid by EU shipowners benefiting from fishing opportunities. EU shipowner payments generally include a non-refundable fixed part and/or a variable part based on their actual utilisation of fishing opportunities.

Under most active Protocols, the basis used to establish the value of access fees is the amount of catch (tonnes) multiplied by a unit price (EUR / tonne). However, two active multispecies Protocols consider solely the capacity of the vessels expressed in tonnage (i.e. GT) to establish the value of access fees for certain fishing categories (e.g. Guinea Bissau 2019-2024, Morocco 2019-2023).

Depending on the Protocols considered, EU shipowner payments for access may include additional payments such as:

- A specific additional contribution for access.
- Payment of national fiscal or parafiscal taxes in relation to access.
- Contributions to the partner third country observer programme.
- Penalty schemes for non-compliance with relevant provisions of the Protocols such as employment of national crew members or quota overages.
- A specific contribution for the protection of the environment.
- In-kind access contribution consisting in mandatory donation to the third country of a share of the catch obtained.

Certain Protocols also foresee financial incentives in the form of discounts on access fees to encourage increased interactions between the EU vessels and the partner third country fishing sector (e.g. use of national ports, sales of catch to the national processing sector).

Access fees are paid directly by the EU shipowners concerned to a public treasury account of the partner third country. Payments generally include an advance non-refundable payment upon application for fishing authorisations, and additional payments are settled at the end of the reference period identified by the Protocols based on the catch obtained (e.g. quarterly or annually). The Commission is not directly involved in EU shipowner payment procedures, but it has the mandate to ensure that EU shipowners pay the different amounts foreseen by the Protocols.

Like the EU contribution to access, partner third countries have full discretion regarding the use of the EU shipowner payments for access, with an exception in the case of Morocco.

2.4 Payments made to partner third countries under SFPAs

The following table summarises payments received by partner third countries from the EU party between 2015 and 2020. The table includes:

- The EU contribution to the access component including the fixed part (the baseline) and the additional variable part as applicable depending on Protocols.

- The EU contribution to the sectoral support component: payments considered in the table are those foreseen ex-ante in the Protocols over their periods of implementation. The figures shown in the table do not take into consideration possible adaptations of payments resulting from implementation performances by partner third countries
- The payments made by EU shipowners to cover the part of access costs including the fixed part (the baseline) and the variable part as applicable depending on Protocols. Where foreseen by the Protocols (Cook Islands, Gabon and Kiribati), the figures also include the additional special contributions. The figures do not include miscellaneous other payments such as contributions to observer programmes or local fiscal / parafiscal taxes. However, according to the different ex-post evaluations of each Protocols, these miscellaneous other payments are small by comparison³⁹.

The details of EU payments to each EU partner third country are presented in the country fiches shown in Annex 19 of this report.

Payments considered in this section are payments foreseen by the Protocols implementing the SFPAs between 2015 and 2020. The table after shows the Protocols applicable during the period considered and the tables in Annex 5, the annual value of EU payments foreseen by the different Protocols for the access and sectoral support components. For some partner third countries, there was an implementing Protocol in force for the whole, or a large part of the period considered. However, for some partner countries, there was not an implementing Protocol for the whole period as a result of Protocols in force in 2015 not being renewed (i.e. Comoros, Gabon, Kiribati, Madagascar) or Protocols starting late in the period considered (e.g. The Gambia).

Table 3: Mapping of Protocols implementing the respective SFPAs between 2015 and 2020

	2015	2016	2017	2018	2019	2020
Cabo Verde	CPV1418	CPV1418	CPV1418	CPV1418	CPV1924	CPV1924
Comoros	COM1416	COM1416				
Cook Islands		COK1621	COK1621	COK1621	COK1621	COK1621
Côte d'Ivoire	CIV1318	CIV1318	CIV1318	CIV1318- CIV1824	CIV1824	CIV1824
Gabon	GAB1316	GAB1316				
The Gambia					GMB1925	GMB1925
Greenland	GRN1519	GRN1620	GRN1620	GRN1620	GRN1620	GRN1620
Guinea Bissau	GNB1417	GNB1417	GNB1417		GNB1924	GNB1924
Liberia	LIB1520	LIB1520	LIB1520	LIB1520	LIB1520	LIB1520
Kiribati	KIR1215					
Madagascar	MAD1518	MAD1518	MAD1518	MAD1518		
Morocco	MOR1418	MOR1418	MOR1418	MOR1418	MOR1923	MOR1923
Mauritius	MUS1417	MUS1417	MUS1417- MUS1721	MUS1721	MUS1721	MUS1721
Mauritanie	MRT1521	MRT1521	MRT1521	MRT1521	MRT1521	MRT1521
São Tomé-et-Príncipe	STP1418	STP1418	STP1418	STP1418	STP1924	STP1924
Senegal	SEN1419	SEN1419	SEN1419	SEN1419	SEN1419- SEN1924	SEN1924
Seychelles	SYC1420	SYC1420	SYC1420	SYC1420	SYC1420	SYC1420- SYC2026

Source: Protocols

³⁹ For example, payments of local taxes under the Protocols concluded with Morocco (2014-2018) and Mauritania (2015-2021) represented 2% of the access fees paid according the provisions of the Protocols

Note: Cells refer to the Protocols. For example, CPV1418 refer to the Protocol implementing the SFA concluded with Cabo Verde between 2014 and 2018.

Table 4: Summary of EU financial commitments (EUR) for partner third countries between 2015 and 2020 in the framework of SFPAs as applicable

(in EUR)	Country	EU public Access fixed	EU public Access additional	EU public Sectoral support	Total EU public	EU shipowners Access	Total
NE Atlantic	Greenland	80 949 093	712 414	17 398 041	99 059 548	10 719 616	109 779 164
	Cabo Verde	1 575 000	907 231	1 475 000	3 957 231	3 472 403	7 429 634
Central Eastern Atlantic	Côte d'Ivoire	2 202 500		1 883 500	4 086 000	1 384 063	5 470 063
	Gabon	900 000	1 151 024	450 000	2 501 024	3 718 068	6 219 092
	Gambie	550 000		550 000	1 100 000	186 670	1 286 670
	Guinée Bissau	35 600 000		14 000 000	49 600 000	6 061 141	55 661 141
	Liberia	1 625 000	68 550	1 560 000	3 253 550	1 601 181	4 854 731
	Maroc	87 100 000		78 700 000	165 800 000	43 265 209	209 065 209
	Mauritanie	340 000 000	90 844	24 750 000	364 840 844	90 936 908	455 777 752
	São Tomé	1 920 000	291 865	1 855 000	4 066 865	1 904 236	5 971 101
	Senegal	4 682 000		3 900 000	8 582 000	4 876 050	13 458 050
	Indian Ocean	Comoros	600 000		600 000	1 200 000	517 708
Madagascar		3 465 000		2 800 000	6 265 000	2 798 493	9 063 493
Maurice		1 732 500	22 400	1 972 500	3 727 400	1 604 578	5 331 978
Seychelles		15 250 000	804 069	15 400 000	31 454 069	22 143 587	53 597 656
Pacific Ocean	Cook Islands	2 170 000		1 750 000	3 920 000	884 873	4 804 873
	Kiribati	975 000	12 805	350 000	1 337 805	1 667 402	1 680 207
	Total	581 296 093	4 061 202	169 394 041	754 751 336	197 742 187	952 493 523

Sources: EU public access baseline and EU public Sectoral support : Protocols
 EU public Access additional : DG MARE budget records
 EU shipowners (fixed + variable): DG MARE

Note: EU public payments for access and sectoral support are allocated in accordance with the Protocols years, meaning for example that EU public payments for a Protocol period starting in November of year n are allocated to year n.

Between 2015 and 2020, EUR 952 million was paid to seventeen partner third countries based on the provisions of the SFPAs and of their implementing Protocols. This amount comprised EUR 755 million (79%) commitments from the EU public budget (access and sectoral support) and EUR 198 million (21%) paid by shipowners benefiting from fishing opportunities available.

On average per year, payments to partner third countries represented EUR 159 million in total, including EUR 126 million paid from the EU public budget (EUR 98 million for access plus EUR 28 million for sectoral support) and EUR 33 million paid by EU shipowners.

In terms of country allocation of EU public payments (access and sectoral support components), the figure below shows that Mauritania alone was allocated 48% of EU payments, and Morocco 22%. These two partner third countries plus Greenland represented 83% of EU public commitments, and these three countries plus Guinea Bissau close to 90% (EUR 680 million in total across the four partner third countries). These four SFPAs are multispecies SFPAs. The other 13 partner third countries were allocated comparatively lower levels of EU public commitments (1% or less), except in the case of Seychelles (4%). All other 13 partner third countries concluded tuna SFPAs with the EU, with a hake component in the case of Senegal and of The Gambia.

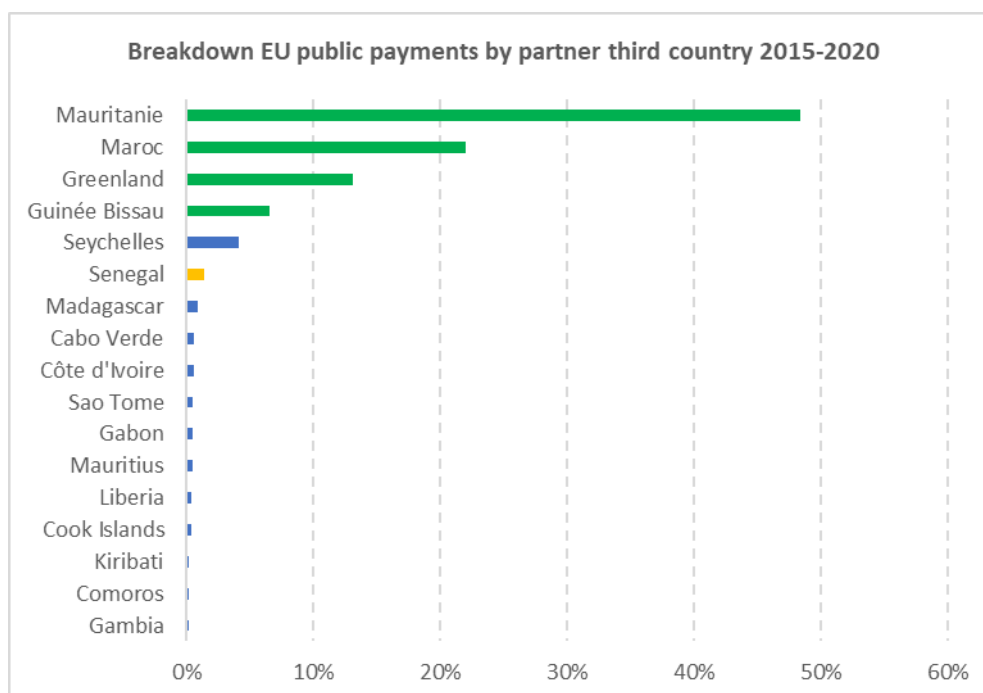


Figure 2: Breakdown of EU public payments by partner third country between 2015 and 2020, access and sectoral support components aggregated

Source: see Table 4

Note: green bars: multispecies SFPAs, blue bars: tuna SFPAs, orange bars: tuna SFPAs with a hake component

By region, EU public expenditure under SFPAs included EUR 608 million (81%) for partner third countries in the central eastern Atlantic Ocean (e.g. West Africa), close to EUR 100 million (13%) for Greenland, EUR 43 million (6%) for partner third countries in the Indian Ocean and EUR 5.3 million (0.7%) for partner third countries in the Pacific Ocean.

When considering the EU contribution to the sectoral support component only, the main beneficiaries were Morocco (46% of total EU commitments for sectoral support) and Mauritania (15%) concentrating 61% of the EUR 169 million invested by the EU in sectoral support. With Greenland (10%) and Guinea Bissau (8%), 80% of EU investment in sectoral

support was earmarked for these four partner third countries. The other 13 partner third countries were allocated comparatively lower levels of EU public commitments (1% or less), except in the case of Seychelles (9%).

Concerning the contribution of EU shipowners benefiting from fishing opportunities available under SFPAs, Mauritania (46%), Morocco (22%) and Greenland (5%) received 75% of the EUR 198 million paid between 2015 and 2020. Seychelles (11%) was also among the main beneficiaries of EU shipowners' payments (11%).

When looking at the respective shares paid by shipowners for access, the following figure shows that the EU shipowners' contribution to access was variable, from 63% of total EU payments for access in the case of Kiribati, to 12% in the case of Greenland. The relative contribution of EU shipowners is relatively homogeneous across tuna SFPAs at about 47% on average, but proportionally lower in the case of multispecies SFPAs (20%). Note that Greenland is a special case with a significant part of the EU contribution for access used to purchase quotas that are subsequently swapped with Northern third countries without an associated financial contribution from shipowners benefiting from the swaps.

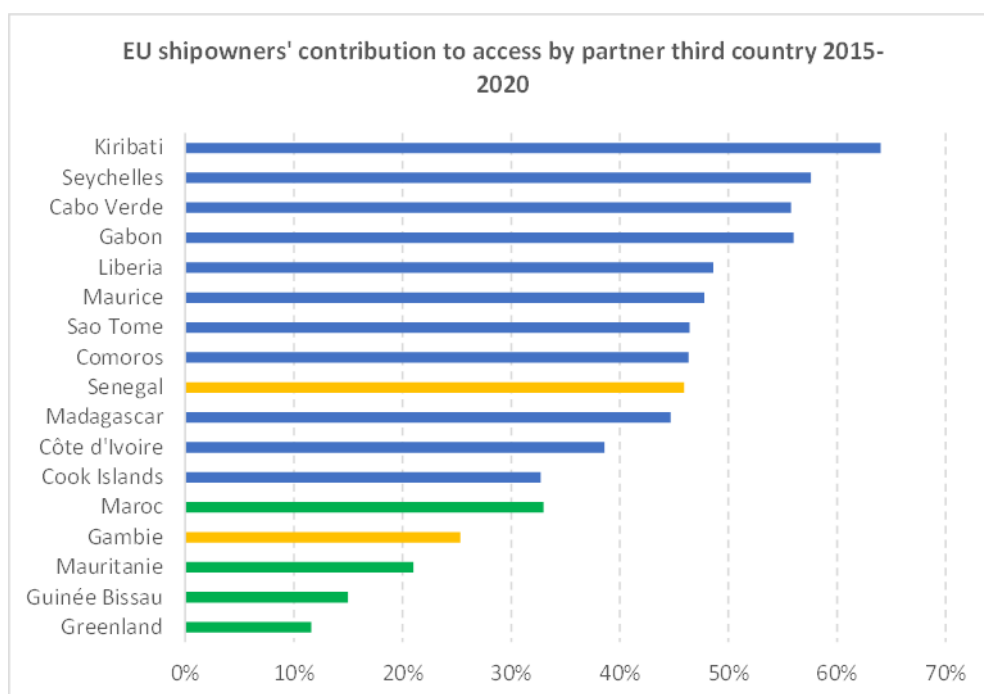


Figure 3: EU shipowners contribution for access as % of total EU contribution for access (i.e. not including EU contribution to sectoral support)

Source: see Table 4

Note: green bars: multispecies SFPAs, blue bars: tuna SFPAs, orange bars: tuna SFPAs with a hake component

2.5 Selected context indicators for the different partner third countries

The country fiches in Annex 19 to this report provide a selection of context indicators as well as the main outcomes of the implementation of SFPAs. The next sections summarise some key context indicators of interest of this evaluation: population and economic status, conditions for access to the EU markets for fisheries and aquaculture products, and levels of exports of fisheries and aquaculture products to the EU as appropriate.

2.5.1 Population and economic status

- In terms of population, partner third countries include countries with a relatively small population (Cabo Verde, Comoros, Cook Islands, Greenland, Kiribati, São Tomé-et-Príncipe and Seychelles), and countries with a relatively large population (up to 36.5 million in the case of Morocco).
- In terms of income group, SFPAs partner countries include high income countries (Greenland, Mauritius and Seychelles), upper middle income countries (Cook Islands, Gabon), lower middle income countries (Cabo Verde, Côte d'Ivoire, Mauritania, Morocco, São Tomé-et-Príncipe and Senegal), and low income countries (Comoros, The Gambia, Guinea Bissau, Kiribati, Liberia and Madagascar). Note that this classification was published by the World Bank in 2020 on the basis of indicators for 2019. Some third countries may change status in 2021 as a result of the economic recession due to the COVID pandemic (e.g. Mauritius returning to the Upper Middle Income group).
- Nine partner third countries are considered by the United Nations as Least Developed Countries (LDCs: Comoros, The Gambia, Guinea Bissau, Kiribati, Liberia, Madagascar, Mauritania, São Tomé-et-Príncipe and Senegal). Other partner third countries are Developing Countries.
- Eight partner third countries are classified as Small Islands Developing States (SIDS): Cabo Verde, Comoros, Cook Islands, Guinea Bissau, Kiribati, Mauritius, São Tomé-et-Príncipe and Seychelles. Comoros, Guinea Bissau, Kiribati, and São Tomé-et-Príncipe are both SIDS and LDCs.

Table 5: Population, income group and development status of SFPAs partner countries

Country	Population (million)	Income group (2020)	Least Developed country	Small Island Developing State
Cabo Verde	0.6	Lower Middle Income	No	Yes
Comoros	0.8	Lower Middle Income	Yes	Yes
Cook Island	0.0	Upper Middle income	No	Yes
Côte d'Ivoire	25.7	Lower Middle Income	No	No
Gabon	2.2	Upper Middle income	No	No
The Gambia	2.3	Low income	Yes	No
Greenland	0.1	High income	No	No
Guinea Bissau	1.9	Low income	Yes	Yes
Kiribati	0.1	Low income	Yes	Yes
Liberia	4.9	Low income	Yes	No
Madagascar	27.0	Low income	Yes	No
Mauritania	4.5	Lower Middle Income	Yes	No
Mauritius	1.3	High income	No	Yes
Morocco	36.5	Lower Middle Income	No	No
São Tomé	0.2	Lower Middle Income	Yes	Yes
Senegal	16.3	Lower Middle Income	Yes	No
Seychelles	0.1	High income	No	Yes

Source: World Bank (population, income group), United Nations (development status)

Note : Situation 2020

2.5.2 Access to the EU market for fisheries and aquaculture products

The following table summarises the situation for the different partner third countries in relation to trade of fisheries and aquaculture products with the EU.

- Twelve partner third countries are authorised to export fisheries and aquaculture products to the EU (Cabo Verde, Côte d'Ivoire, Gabon, The Gambia, Greenland, Kiribati, Madagascar, Mauritania, Mauritius, Morocco, Senegal and Seychelles). Four partner third countries were not authorised to export fisheries and aquaculture products (Cook Islands, Guinea Bissau, Liberia and São Tomé-et-Príncipe) by the end of 2020.
- Most partner third countries can access the EU market duty-free and quota-free under different trade arrangements (see Table 6) for products complying with the applicable rules of origin without prejudice to agreed derogations. Two partner third countries do not benefit from duty-free access to the EU market: Cook Islands (the standard Generalised Scheme of Preferences - GSP - apply) and Gabon (an upper middle-income country not party to a specific trade arrangement with the EU).

Table 6: Main indicators in relation to trade of fisheries and aquaculture products between the EU and the partner third countries.

	Authorised to export ?		Duty free?	Trade arrangement	EU export value in 2019 (EUR mln)	Export trends for export to EU 2015-2019
	SANTE rules	IUU rules				
Cabo Verde	Yes	Yes	Yes	GSP+	69	Increasing
Comoros	No	No	Yes	EBA		n.a.
Cook Islands	No		No	GSP		n.a.
Cote d'Ivoire	Yes	Yes	Yes	EPA	107	Stable
Gabon	Yes	Yes	No	Erga omnes	0.2	Stable
Gambia	Yes	Yes	Yes	EBA	5	Stable
Greenland	Yes	Yes	Yes	OCT	639	Increasing
Guinea Bissau	No		Yes	EBA		n.a.
Kiribati	Yes	Yes	Yes	EBA	0.1	Stable
Liberia	No		Yes	EBA		n.a.
Madagascar	Yes	Yes	Yes	EBA	108	Stable
Mauritania	Yes	Yes	Yes	EBA	335	Increasing
Mauritius	Yes	Yes	Yes	EPA	258	Stable
Morocco	Yes	Yes	Yes	EuroMed	1 269	Increasing
São Tomé	No		Yes	EBA		n.a.
Senegal	Yes	Yes	Yes	EBA	242	Increasing
Seychelles	Yes	Yes	Yes	EPA	233	Stable

Source: SANTE rules: Listing pursuant to Article 127 of Regulation (EU)2017/625⁴⁰ and Commission Delegated Regulation (EU) 2019/625⁴¹

⁴⁰ Regulation (EU) 2017/625 of the European Parliament and of the Council of 15 March 2017 on official controls and other official activities performed to ensure the application of food and feed law, rules on animal health and welfare, plant health and plant protection products, amending Regulations (EC) No 999/2001, (EC) No 396/2005, (EC) No 1069/2009, (EC) No 1107/2009, (EU) No 1151/2012, (EU) No 652/2014, (EU) 2016/429 and (EU) 2016/2031 of the European Parliament and of the Council, Council Regulations (EC) No 1/2005 and (EC) No 1099/2009 and Council Directives 98/58/EC, 1999/74/EC, 2007/43/EC, 2008/119/EC and 2008/120/EC, and repealing Regulations (EC) No 854/2004 and (EC) No 882/2004 of the European Parliament and of the Council, Council Directives 89/608/EEC, 89/662/EEC, 90/425/EEC, 91/496/EEC, 96/23/EC, 96/93/EC and 97/78/EC and Council Decision 92/438/EEC (Official Controls Regulation)Text with EEA relevance. OJ L 95, 7.4.2017, p. 1–142

⁴¹ Commission Delegated Regulation (EU) 2019/625 of 4 March 2019 supplementing Regulation (EU) 2017/625 of the European Parliament and of the Council with regard to requirements for the entry into the Union of consignments of certain animals and goods intended for human consumption (Text with EEA relevance.) C/2019/11. OJ L 131, 17.5.2019, p. 18–30

IUU rules: Information from the European Commission, published in accordance with Article 22(2) of Council Regulation (EC) No 1005/2008, concerning flag State notifications (List of States and their competent authorities), according to Article 20(1), (2) and (3), and Annex III to Council Regulation (EC) No 1005/2008
Tariffs and trade arrangements: Access2Markets database (DG TRADE)
Export value (2020) and trends 2015-2019: Eurostat
GSP: standard Generalised Scheme of Preferences / GSP+: GSP incentive arrangement for sustainable development and good governance; EBA: GSP special arrangement for Least Developed Countries, EPA: Economic Partnership Agreement, OCT: Overseas Countries and Territories.

2.5.3 Contribution of SFPA partner third countries to the supply of the EU market

The next table shows the respective contribution of the different SFPA partner third countries to the value of the total imports of fisheries products into the EU, on average between 2017 and 2019. Data provided are for exports sourced from any fishing fleet, including the national fishing fleet, the EU fishing fleet, or other foreign fishing fleets.

Table 7: Contribution of SFPA partner third countries to the value of total imports of fisheries products in the EU (average 2017-2019)

Partner third countries	Fish and crustaceans, molluscs and other aquatic invertebrates*	Prepared or preserved fish**
Cabo Verde	0.1%	1.2%
Comoros	n.a.	n.a.
Cook Islands	n.a.	n.a.
Côte d'Ivoire	0.0%	3.3%
Gabon	0.0%	0.0%
Gambia	0.0%	0.0%
Greenland	1.8%	0.1%
Guinea-Bissau	n.a.	n.a.
Kiribati	0.0%	0.0%
Liberia	n.a.	n.a.
Madagascar	0.4%	0.8%
Mauritania	1.5%	0.0%
Mauritius	0.1%	6.9%
Morocco	3.5%	9.0%
São Tomé-et-Príncipe	n.a.	n.a.
Senegal	1.0%	0.1%
Seychelles	0.2%	6.1%
Total SFPAs	8.7%	27.4%

Source: COMEXT Eurostat

Note: * Chapter 03 of the Combined Nomenclature

** Heading 1604 of Chapter 16 of the Combined Nomenclature

n.a. Not authorised to export fisheries products to the EU

0.0% does not necessarily mean zero, but a contribution of less than 0.05%

- As far as unprocessed fish, crustaceans, molluscs and other aquatic invertebrates are concerned, SFPA partner third countries represented 8.7% of the value of imports into the EU, with products originating in Greenland, Morocco Mauritania and Senegal representing 90% of EU imports of fisheries products from SFPA partner third countries.
- Concerning Prepared or preserved fish, the contribution of SFPA partner third countries represented 27.4% of total imports, with products originating in Morocco (mostly canned sardine and canned tuna), Mauritius, Seychelles and Côte d'Ivoire

(mostly canned tuna and tuna loins for the three countries) accounting for 92% of EU imports of prepared fish products from SFPA partner third countries.

3 The access component of SFPAs

3.1 Overview of the EU fishing fleet operating in the framework of SFPAs

Since 2015, 211 EU fishing vessels per year on average have utilised the fishing opportunities available under SFPAs for at least one fishing authorisation period, with a decreasing trend between 2015 and 2020. The total fishing capacity of the fishing fleet was 244 687 GT and 335 159 kW on average per year. The EU fishing fleet having utilised fishing opportunities under SFPAs represented 0.3% of the total number of EU fishing vessels all Member States, 19% of the total fishing capacity of the EU fleet expressed in tonnage (GT) and 6% of the total fishing capacity of the EU fleet expressed in engine power (kW)⁴².

Table 8: Number of EU fishing vessels having utilised fishing opportunities available under SFPAs during at least one fishing authorisation period between 2015 and 2020

	2015	2016	2017	2018	2019	2020	Average
Number of fishing vessels	226	233	230	209	187	182	211
Total tonnage (GT)	239 489	264 137	274 115	244 644	223 056	222 678	244 687
Total power (kW)	328 372	356 163	364 775	335 901	313 557	312 186	335 159

Source: DG MARE ACDR data extracted 15.04.2021

Note: support vessels excluded

The fishing vessels having utilised the fishing opportunities available were registered in 13 different Member States⁴³. Fishing vessels from Spain represented 66% of the total number and 33% of the total capacity in GT.

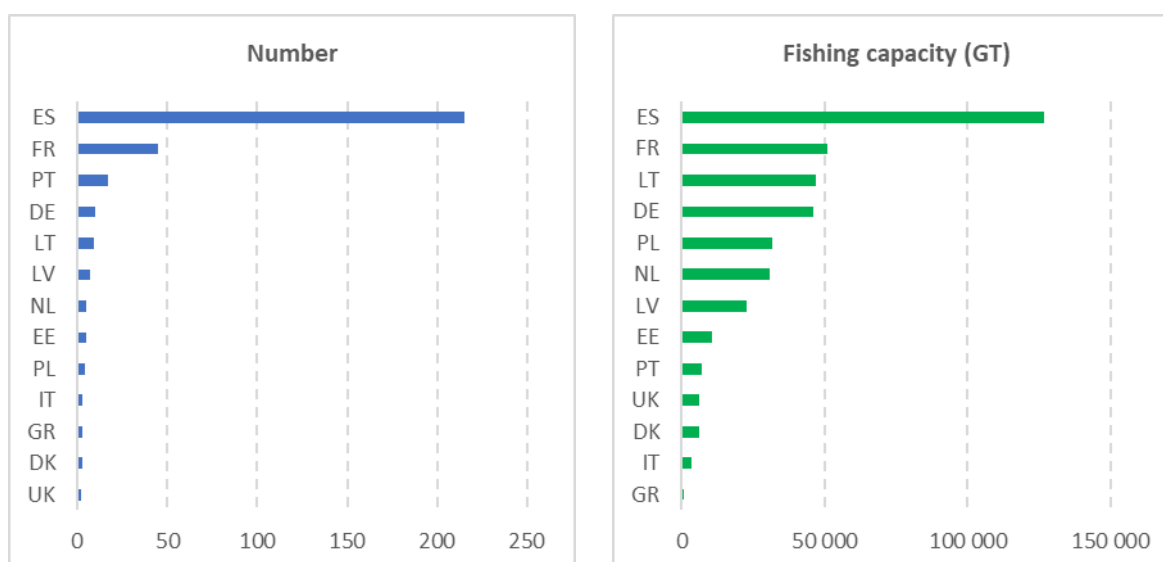


Figure 4: Number and fishing capacity of EU fishing vessels having used the fishing opportunities under SFPAs by Member State between 2015 and 2020

Source: DG MARE ACDR data extracted 15.04.2021

Note: support vessels excluded

⁴² According to the EU fishing fleet register, the EU fishing fleet included 75 664 vessels for a capacity of 1 352 126 GT and 5 445 455 kW on 01.01.2019

⁴³ Denmark (DK), Estonia (EE), France (FR), Germany (DE), Greece (GR), Italy (IT), Latvia (LV), Lithuania (LT), Netherlands (NL), Poland (PL), Portugal (PT), Spain (ES) and the United Kingdom (UK)

Fishing vessels operating under SFPAs may be distinguished according to the fishing techniques used and the species assemblage targeted. The following paragraphs present the different categories considered for the purpose of this evaluation.

Fishing vessels targeting highly migratory species

- Purse seiners: purse seiners are large vessels (i.e. around 80 m length) catching tunas and other species with an encircling net when they are close to the surface. Tunas are caught when they are swimming in free schools or when they aggregate under artificial drifting Fish Aggregating Devices (FADs). A fishing trip of a purse seiner typically lasts around 45 days. Catch is frozen in brine onboard. Due to the freezing method, catch is not fit for direct human consumption. It is used as raw material by the canning industry.
- Pole and liners: pole and liners are large vessels (i.e. 30m to 40m length) catching tuna attracted by the release of live bait with hook and lines. Other characteristics (utilisation of catch, duration of fishing trips) are largely similar to purse seiners. There are also small pole and liners, in particular based in Canary Islands (ES).
- Longliners: longliners are also large vessels (i.e. around 30m length) catching mostly swordfish and associated species, including tunas, with long lines equipped with several hundred baited hooks. Longliners do not use FADs. A fishing trip of a longliner may last a couple of months. Catch is dry-frozen onboard and fit for direct human consumption. There are also small longliners (i.e. around 12m length) keeping catch in ice onboard with fishing trips lasting around 10 days. This segment is present in La Réunion (FR) in particular.

Fishing vessels targeting demersal species

- Bottom trawlers and longliners: most trawlers operating under SFPAs are relatively large vessels (i.e. 35m) catching fish, crustaceans and molluscs with a towed net sweeping the seabed. Catch is frozen onboard and fishing trips last several weeks. Some trawlers are of smaller size with catch kept in ice onboard. Bottom longliners target mostly fish species with long lines equipped with several hundred baited hooks.
- Other bottom gear: this category covers vessels fishing with traps and nets. Some of the vessels in this category authorised to fish in the waters of Morocco are small-scale vessels using lines and traps.

Fishing vessels targeting small pelagic species

- Pelagic trawlers: pelagic trawlers are large vessels (around 80m length) catching sardines, horse mackerel or mackerel with a towed net deployed in the water column off the bottom. Catch is frozen onboard and fit for human consumption. Fishing trips may last several weeks.
- Other pelagic gears: this category comprises mostly fishing vessels catching small pelagic species with an encircling net when they are close to the surface in the water column. Catch is usually kept in tanks containing refrigerated sea water (unfrozen). Some vessels in this category are relatively small-scale vessels (i.e. 24m) while others may be larger (i.e. 35m) with higher catching capacity.

By type of fishing technique utilised by the vessels and by types of species targeted (demersal species, highly migratory species and small pelagic species), the following figure shows that 51% of the vessels having used the fishing opportunities available between 2015 and 2020 on average were targeting on highly migratory species, 35% demersal species, and 14% small pelagic species. In terms of fishing capacity expressed in GT, the breakdown was on average 52% of fishing capacity being used to fish for highly migratory species, 33% for small pelagic species and 15% for demersal species. In terms of fishing capacity expressed in kW, the breakdown was 59%, 24% and 16% respectively.

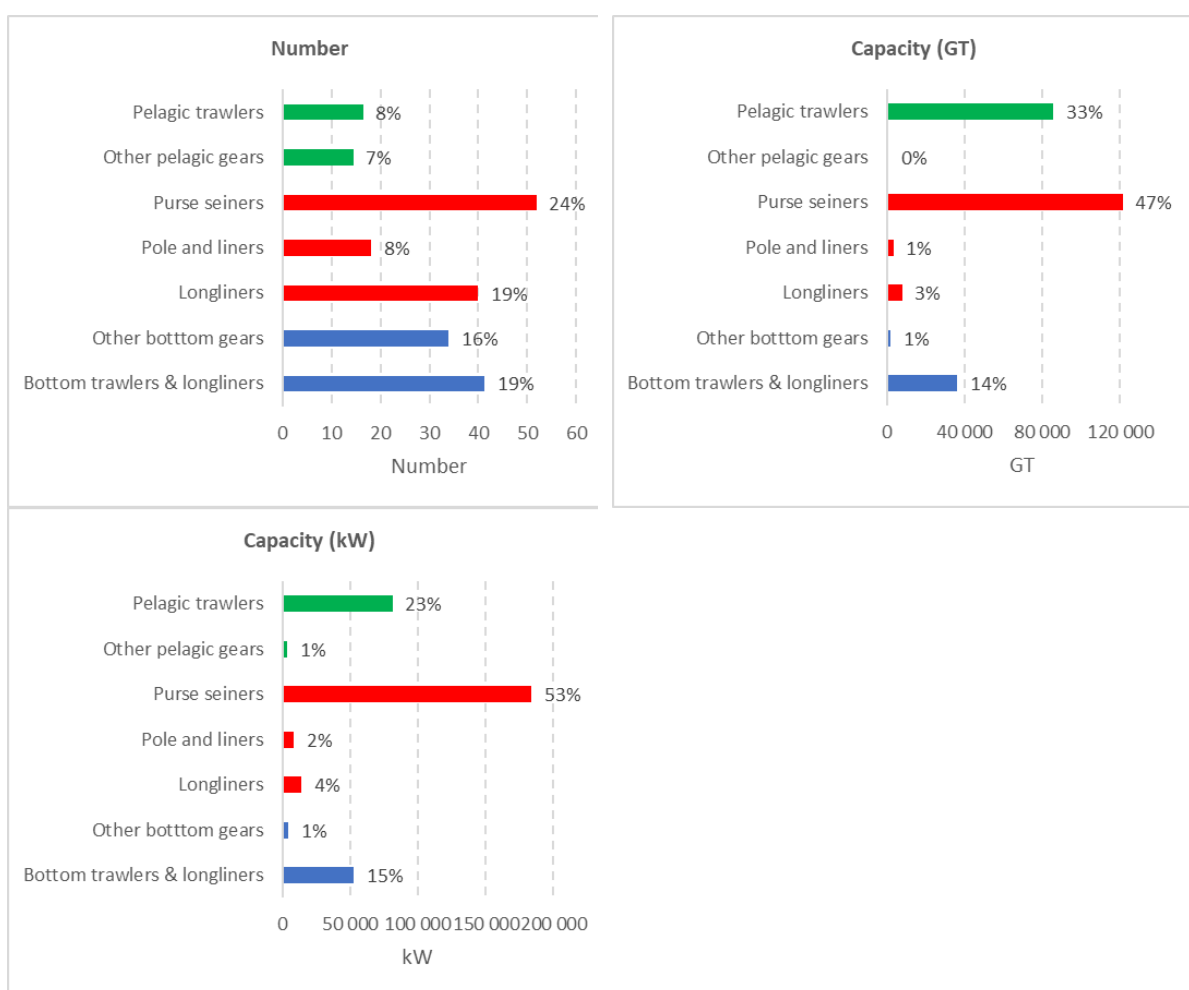


Figure 5: Breakdown of capacity indicators for the EU fishing fleet having used fishing opportunities under SFPAs between 2015 and 2020 by types of vessels and types of target assemblage (green: small pelagic species, red: highly migratory species, blue: demersal species).

Source: DG MARE ACDR data extracted 15.04.2021

Note: support vessels excluded

The following table shows the average annual number and fishing capacity of EU fishing vessels having utilised fishing opportunities between 2015 and 2020 by regions.

Table 9: EU fleet average 2015-2020 capacity indicators per groups of species targeted and by region

Groups of species targeted	Indicator	N-E Atlantic	Central Atlantic	Indian Ocean	Pacific Ocean
Small pelagic species	Number	3	24		
	GT	5 290	58 929		
	kW	5 726	53 303		
Highly migratory species	Number		56	52	2
	GT		50 499	81 690	8 379
	kW		83 724	122 785	9 933
Demersal species	Number	10	64		
	GT	26 781	13 119		
	kW	42 359	23 055		

Source: DG MARE ACDR data extracted 15.04.2021

Note: support vessels excluded

N-E Atlantic: Greenland

Central Atlantic: Morocco, Mauritania, Guinea Bissau, Cabo Verde, Senegal, the Gambia, Liberia, Côte d'Ivoire, Gabon and São Tomé-et-Príncipe
Indian Ocean: Comoros, Madagascar, Mauritius, Mozambique and Seychelles
Pacific Ocean: Cook Islands and Kiribati

- The Central Eastern Atlantic region (from Morocco to Gabon) accounted for most of the EU fishing capacity operating under SFPAs with a total average number of 144 fishing vessels (68% of total number) representing 50% and 48% of the total capacity in GT and kW respectively. EU vessels targeting small pelagic species and demersal species operate under the multispecies SFPAs concluded with Morocco, Mauritania and Guinea Bissau, while EU vessels targeting highly migratory species are present under all SFPAs in the region.
- In the Indian Ocean (the South-West region), only EU vessels authorised to target highly migratory species were authorised between 2015 and 2020. On average 52 EU vessels operated in this region representing an average of 33% and 37% of the total capacity in GT and kW respectively, due to a relatively high number of purse seiners compared to other regions (28 on average, as opposed to 24 in the Central Eastern Atlantic).
- In the North-east Atlantic, the fishing fleet is that operating under the SFPAs with Greenland. It consisted of 13 fishing vessels on average between 2015 and 2020 targeting demersal and small pelagic species, representing 13% of the capacity of the EU fishing fleet active under SFPAs both in GT and in kW.
- Finally, the EU fishing fleet having utilised the fishing opportunities available under SFPAs concluded with Pacific States (Cook Islands and Kiribati) was two vessels per year on average (all purse seiners specialised on highly migratory species) representing 3% of the capacity of the EU fishing fleet active under SFPAs both in GT and in kW.

Box 2: Access for fishing fleets based in the EU outermost regions

Fishing opportunities available in the framework of SFPAs were available to fishing fleets based in certain EU outermost regions:

- EU fishing fleets based in Canary Islands (Spain) exploited the fishing opportunities available in the framework of the multispecies SFPAs concluded with West African partner third countries (i.e. Morocco, Mauritania and Guinea Bissau).
- EU fishing fleets based in Mayotte and La Réunion (France) exploited the fishing opportunities available in the framework of the tuna SFPAs concluded with partner third countries in the Indian Ocean (i.e. Madagascar, Mauritius and Seychelles)

The fishing fleet based in other outermost regions - Azores and Madeira (PT), French Guyana, Guadeloupe and Martinique (FR) does not use the fishing opportunities available under the current network of SFPAs because the waters of the partner coastal states are too far away considering the operational range of the local fleets.

Source: ex-post evaluations

3.2 EU catch in the framework of SFPAs

EU catch under SFPAs represented an average of 300 000 tonnes per year between 2015 and 2020, with wide inter-annual variations resulting from the status of the different SFPAs (active or inactive) and utilisation of fishing opportunities available under active SFPAs. The details of EU catch under SFPAs are presented in the country fiches shown in Annex 19 of this report.

The following table shows the breakdown of catch obtained under all active SFPAs by groups of species. Main groups of species caught, in terms of volumes, were small pelagic species (e.g. sardine, mackerel) with 49% of total accumulated catch over the period, followed by highly migratory species (e.g. tuna and tuna-likes) with 39% of the total accumulated catch. Other groups of species represented a comparatively small contribution with other fish species (e.g. hake, finfish) representing 10% of the total accumulated catch, crustaceans (e.g. shrimps) 2%, and cephalopods (e.g. squid, octopus) less than 1%.

Table 10: Total catch (tonnes) obtained by EU vessels under active SFPAs between 2015 and 2020

(tonnes)	2015	2016	2017	2018	2019	2020	% accumulated catch
Highly migratory species	121 109	143 337	118 712	112 957	116 104	92 165	39%
Small pelagics	84 533	218 802	170 504	134 851	142 489	138 614	49%
Other fish species	27 595	34 626	33 744	29 184	31 532	29 059	10%
Cephalopods	1 440	1 211	1 494	374	1 541	457	0%
Crustaceans	3 660	4 372	5 406	5 269	5 344	6 988	2%
Total	238 337	402 347	329 859	282 636	297 010	267 283	100%

Source: DG MARE ACDR database extracted 03.04.2021

Catch of small pelagic species, other fish species, cephalopods and crustaceans were obtained under the multispecies SFPAs concluded with certain partner third countries in Africa and with Greenland. The SFPA concluded with Greenland represented a significant proportion of the total catch of crustaceans (63% on average) and of other fish species (36% on average). Almost all catch of small pelagic species was obtained within the framework of the SFPAs concluded with Mauritania and Morocco.

For highly migratory species, catch obtained under SFPAs concluded with partner third countries in the Indian Ocean represented 52% of total catch of these species under SFPAs, and 47% under SFPAs concluded with partner third countries in the Central Eastern Atlantic Ocean. Catch of highly migratory species obtained under SFPAs with partner third countries in the Pacific Ocean were relatively marginal by comparison (1%).

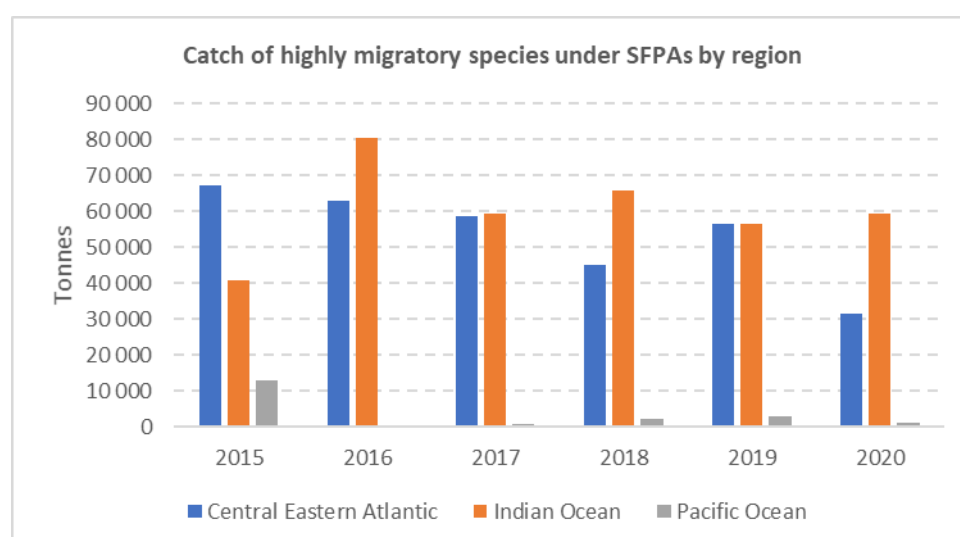


Figure 6: Catch of highly migratory species (e.g. tunas and tuna-likes) under SFPAs by oceanographic region.

Source: based on DG MARE ACDR database extracted 03.04.2021

First-sale value of catch under SFPAs can be estimated based on the first-sale prices (ex-vessel) of the main commercial species exploited in the framework of SFPAs. Annex 6

provides a list of average annual first sale prices by species based on information available from several sources.

First-sale value of catch under SFPAs amounted to slightly more than EUR 410 million per year on average between 2015 and 2020, with a maximum of EUR 512 million in 2016. Catch of highly migratory species represented 40% of total catch value under SFPAs, followed by small pelagics (33%) and other fish species (20%).

Table 11: Total first-sale (ex-vessel) value of catch (EUR mln) obtained by EU vessels under active SFPAs between 2015 and 2020

(EUR million)	2015	2016	2017	2018	2019	2020	% average
Highly migratory species	145.5	188.8	193.3	165.5	159.1	128.3	40%
Small pelagics	75.9	193.5	148.7	115.9	140.6	136.9	33%
Other fish species	78.7	97.8	87.2	74.5	78.5	78.4	20%
Cephalopods	7.4	6.2	10.0	2.5	9.0	2.5	2%
Crustaceans	14.5	25.9	24.6	26.4	24.6	26.4	6%
Total	322.0	512.1	463.8	385.0	411.9	372.5	100%

Source: DG MARE ACDR database extracted 03.04.2021 and first sale prices of main species displayed in Annex 6

Catch under SFPAs vs EU production

The following table compares EU catches under SFPAs with total EU catches (production) for categories of fisheries products exploited under the framework of SFPAs.

Table 12: Comparison between catch under SFPAs and EU production of wild-caught species

(tonnes)	SFPAs*	EU Production	SFPAs / EU Production
Highly migratory species	107 075	498 795	21%
Small pelagics	138 651	1 697 736	8%
Other fish species**	29 925	680 461	4%
Cephalopods	791	92 594	1%
Crustaceans	5 867	194 469	3%
Total	282 310	3 164 055	9%

Source: based on DG MARE ACDR database extracted 03.04.2021 for catch under SFPAs, EUMOFA (2020) EU Fish Market edition for EU production

Notes: *For SFPAs, catch shown is the average 2018-2020

** For the purpose of this table, "other fish species" are assumed to correspond to the "groundfish" category identified by EUMOFA

Compared to EU production of wild-caught species⁴⁴, catches under SFPAs represented on aggregate 9% of total EU production of selected species groups, with the highest contribution for highly migratory species for which catches under SFPAs represented 21% of total EU production. For other categories of products, catches under SFPAs represented a lower contribution, with 8% in the case of small pelagic species and 4% in the case of other fish species (groundfish).

3.3 Level of utilisation of fishing opportunities available in the framework of SFPAs

3.3.1 Tuna SFPAs

⁴⁴ Hence excluding aquaculture production

Reference tonnage

In the case of tuna SFPAs, a first indicator can be derived from a comparison between the catch obtained in the waters of the partner third countries and the reference tonnage defined in the Protocol to set the value of the share of the access component paid from the EU public budget. As outlined earlier in this report, the reference tonnage is not a catch limit. It may be exceeded, triggering additional access payments by the EU party in this case.

The next table shows that the reference tonnage defined in the different Protocols applicable between 2015 and 2020 was utilised for at least 75% of its value on annual average during the period, in the case of Cabo Verde, Gabon, Seychelles and Kiribati.

The reference tonnage was used for less than 75% on annual average in the case of The Gambia, Senegal, Côte d'Ivoire, Liberia, São Tomé-et-Príncipe, Comoros, Madagascar, Mauritius and Cook Islands. However, for Liberia, São Tomé-et-Príncipe and Mauritius, the reference tonnage was exceeded during certain years, or was approached (90%) in the case of Comoros.

Table 13: Status of utilisation of the reference tonnage between 2015 and 2020 (annual average)

Protocols with annual average catch equivalent to at least 75% of the reference tonnage	Protocols with annual average catch equivalent to less than 75% of the reference tonnage
Cabo Verde	Gambia
Gabon	Senegal
Seychelles	Côte d'Ivoire
Kiribati	Liberia*
	São Tomé-et-Príncipe*
	Comoros*
	Madagascar
	Mauritius*
	Cook Islands

Source: Ex-post evaluations updated with DG MARE catch data

Note: * reference tonnage exceeded or approached during certain years

The level of catch compared to the reference tonnage impacts the actual value of unit access costs (EUR / tonne) borne by the EU. As shown in the figure below, the actual unit access cost borne by the EU public budget (not including the sectoral support envelope) was substantially higher (at least twice as much) than expected in the case of Côte d'Ivoire, Cook Islands, Comoros, Madagascar and Senegal, around 20% higher in the case of Liberia, Mauritius and São Tomé-et-Príncipe, but aligned with the negotiated price in the cases of Cabo Verde, Gabon, Kiribati and Seychelles.

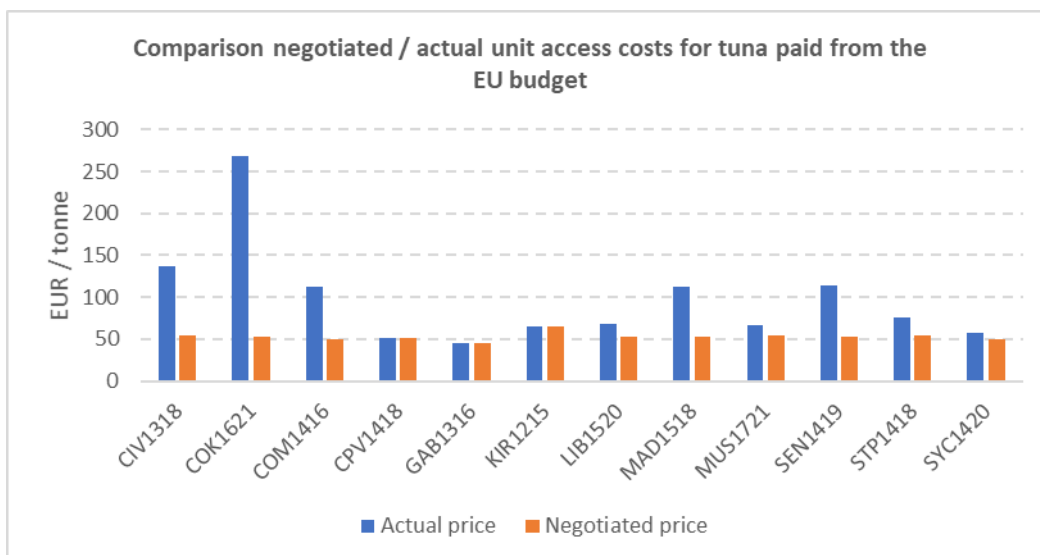


Figure 7: Comparison between the negotiated unit access cost for tuna and actual unit access cost paid by the EU budget for a selection of Protocols

Source: Ex-post evaluations

Over the 2015 – 2020 period, the reference tonnage was increased from one Protocol to the next in the case of Cabo Verde (5 000 t 2014-2018 to 8 000 t 2019-2024) and São Tomé-et-Príncipe (7 000 t 2014-2018 to 8 000 t 2019-2024), and decreased in the case of Senegal (14 000 t 2014-2019 to 10 000 t 2019-2024), Côte d’Ivoire (6 500 t 2013-2018 to 5 500 t 2018-2024) and Mauritius (5 500 t 2014-2017 to 4 000 t 2019-2024). For Seychelles, the reference tonnage was kept at 50 000 t under the 2014-2020 and 2020-2026 Protocols.

Number of fishing authorisations

Atlantic Ocean

- For purse seiners, the number of fishing authorisations issued was 21 per year on average, compared to a maximum of 28 on average across the Protocols (75% utilisation). Fishing opportunities for purse seiners were available under all Protocols, except in Morocco (and Greenland).
- For surface longliners, the number of fishing authorisations issued varied between 10 on average under the Protocols concluded with Cabo Verde, and between two and five under other Protocols considering access for this type of vessels. The level of utilisation of fishing authorisations by EU surface longliners was close to 50% on average, depending on the Protocols. Fishing opportunities for EU surface longliners were not included under the framework of SFPAs concluded with The Gambia, Guinea Bissau, Gabon and Senegal (until 2019).
- For pole and liners, the number of fishing authorisations issued under the different Protocols considering access for these vessels was relatively stable at around eight on average per year, with the maximum number allowed by the Protocols varying between eight and fourteen (average twelve), hence an average utilisation rate of 66%. Fishing opportunities for EU pole and liners were not included under the Protocols concluded with Côte d’Ivoire, Guinea Bissau (until 2017), Liberia, and São Tomé-et-Príncipe

Indian Ocean

- For purse seiners, the number of fishing authorisations issued was 28 per year on average, compared to a maximum of 40 on average across the Protocols (70% utilisation). Fishing opportunities for purse seiners were available under all Protocols concluded with coastal States of the region.

- For surface longliners, the number of fishing authorisations issued was around 26 on average for accessing the Madagascar and Mauritius fishing zones of interest for the small-scale longline segment based in La Réunion. Considering the maximum of 45 (Mauritius) and 54 (Madagascar), the utilisation rate was around 50% for these two SFPAs. In the case of Seychelles, six to eight fishing opportunities were available under the successive 2014-2020 and 2020-Protocols, but were utilised by one vessel on average (\approx 15% utilisation). Fishing opportunities for EU longliners were available under all Protocols concluded with coastal States of the region.

Pacific Ocean

The number of EU purse seiners active in the Western Central Pacific Ocean varied between two and four between 2015 and 2020. The utilisation of the four fishing opportunities foreseen under the Protocols concluded with Kiribati and Cook Islands was variable between 50% and 100%. Fishing opportunities for EU surface longliners were available under the Protocol concluded with Kiribati, but have not been utilised.

3.3.2 Multispecies SFPAs

Greenland

The ex-post evaluation of the 2016-2020 Protocol published in 2021 indicated that the level of utilisation of most fishing opportunities available under was high (95% on average), with the exception of the relatively limited fishing opportunities available to exploit shrimps in East Greenland (below 50%). Some poorly utilised fishing opportunities available under the 2013-2015 Protocol (e.g. Atlantic halibut, snow crab) have not been carried over under the 2016-2020 Protocol.

Morocco

The ex-post evaluation of the 2014-2018 Protocol published in 2018 showed that utilisation of fishing opportunities available for categories other than industrial pelagic trawlers was high for some categories (cat. 1 pelagic small-scale fishing in the north, cat. 2 demersal small-scale fishing in the north). However, utilisation was low (50% and less) for other categories (cat. 3 small-scale fishing in the south, cat. 4 demersal fishing and cat. 5 tuna fishing). The minutes of the Joint Committee held in December 2020 suggest that utilisation of all these five categories deteriorated in comparison with the previous Protocol.

Concerning industrial small pelagic vessels (cat. 6), the available annual quota of 80 000 tonnes was fully utilised (95% and more) throughout the Protocol implementing the SFPA between 2014 and 2018. The 2019-2023 Protocol increased the annual quota to 100 000 tonnes which was also close to 100% utilisation based on provisional catch data available for 2020.

Mauritania

The ex-post evaluation of the 2015-2021 Protocol published in 2019 identified that utilisation of fishing opportunities available for fishing vessels targeting black hake (cat. 2 and cat. 2 bis) and fishing vessels targeting demersal species targeting species other than black hake (cat. 3) was high. A similar high utilisation rate was also reported for tuna vessels. By contrast, utilisation of fishing opportunities for shrimp trawlers (cat. 1) was low (\approx 30% of the available quota). The minutes of the Joint Committee held in December 2020 suggest that the utilisation pattern of fishing opportunities remained the same. Fishing opportunities for shrimp trawlers were also underutilised in the 2012-2014 Protocol, but the same annual quota of 5 000 tonnes was retained for the 2015-2021 Protocol.

Concerning industrial small pelagic vessels, the available annual quota of 225 000 tonnes was moderately utilised (around 50%) between 2015 and 2018, with recent catch data suggesting a deterioration of the utilisation rate of the available quota in 2019 and 2020. The underutilisation of the available quota for small pelagic industrial vessels has been a recurrent issue since 2006, despite its reduction from one Protocol to the next (440 000

tonnes under the 2006-2012 Protocol, then 300 000 tonnes under the 2012-2014 Protocol, and then 225 000 tonnes under the current Protocol since 2015.

Guinea Bissau

The ex-post evaluation of the 2014-2017 Protocol published in 2018 reported that utilisation of fishing opportunities was high for fishing vessels authorised to target fish and cephalopods species (cat.2), but low for fishing vessels authorised to catch shrimps (cat. 1). The same levels of fishing opportunities for these two categories were included under the 2019-2024 Protocol, with a similar utilisation pattern (high for fish and cephalopod trawlers and low for shrimp trawler) mentioned in the minutes of the Joint Committee held in October 2019.

The 2019-2024 Protocol introduced limited fishing opportunities for small pelagics (15 000 GRT / 18 000 tonnes per year) that were not considered under the previous Protocol. Information available suggests that the fishing opportunities have not been utilised by EU vessels until now.

3.3.3 Main elements underpinning utilisation of fishing opportunities available

- For tuna SFPAs, seeking alignment between the reference tonnage and the likely catch of EU tuna vessels during the annual periods covered by the Protocols is a difficult exercise for the negotiators considering the highly migratory nature of tuna species. Whilst past records of catch may provide a valuable indicator to consider, changing oceanic conditions may dramatically change the picture, as exemplified by the large shifts in the distribution of target species underpinned by occurrences of El Niño / La Niña events in the Pacific Ocean. Two recent scientific studies⁴⁵ highlighted the significant inter-annual variability in tuna abundance in different areas of the Atlantic and Indian Oceans.
- Utilisation of fishing opportunities for tuna vessels is also somehow dependent on the opportunities provided to EU operators through the regional networks of SFPAs. The interest in access to a fishing zone is underpinned by access opportunities to neighbouring fishing zones. For example, EU operators highlighted that the lack of access opportunities to the waters of Mozambique and Comoros in the Indian Ocean underpinned a redeployment strategy towards Seychelles and international waters, thus decreasing the interest in access to Madagascar's waters. In the Atlantic Ocean, the lack of access opportunities to Gabon and Equatorial Guinea waters probably undermined the interest in accessing the waters of São Tomé-et-Príncipe, with EU operators deploying more effort in the Northern Central Atlantic (i.e. Cabo Verde, Mauritania). In the Western Central Pacific Ocean, the lack of access opportunities to the waters of Kiribati probably undermined the interest in utilisation of the fishing opportunities available in the waters of Cook Islands.
- In the specific case of EU pole and liners, fishing for tuna is possible only if live bait (small pelagic species) could be loaded onboard before the fishing trip. Difficulties in obtaining live bait may impact the utilisation of fishing opportunities, as exemplified in the recent case of Senegal⁴⁶.
- In some cases in the context of multispecies SFPAs, EU operators reported that access conditions discourage utilisation of fishing opportunities. This was particularly the case for the small pelagic industrial fleet in Mauritania with the cost of access and authorised fishing areas found inappropriate by EU operators to ensure profitability of the fishing operations. As a result, there was no utilisation of

⁴⁵ Akia, S., Amandé, M., Pascual, P., Gaertner, D. (2021) Seasonal and inter-annual variability in abundance of the main tropical tunas in the EEZ of Côte d'Ivoire (2000-2019). *Fisheries Research* 243 / Nataniel, A., Lopez, J., Soto, M. (2021) Modelling seasonal environmental preferences of tropical tuna purse seine fisheries in the Mozambique Channel. *Fisheries Research* 243

⁴⁶ Senegal decided in 2021 to prohibit catching of live bait in the area traditionally utilised by EU pole and liners.

fishing opportunities available by certain fleet segments. Unattractive conditions set out by Protocols provisions have also been put forward by EU operators to explain their lack of interest in the fishing opportunities available in the waters of Morocco. This concerned in particular EU operators in category 3, prevented until now from using their traditional fishing gear (traps), or EU operators of vessels in category 4 explaining a lack of interest in the fishing opportunities available resulting from reduced fishing periods and fishing areas, access costs and mandatory landing provisions set out in the 2014-2018 Protocols. In the case of Liberia, EU longliners reported abandoning the utilisation of fishing opportunities after being subject to treatment deemed unfair during a control operation carried out by a private entity contracted by the Liberian authorities to deploy inspections at sea.

When technical conditions are obviously hindering utilisation of fishing opportunities, the parties endeavour to find an adequate solution compatible with the governing principles of SFPAs, particularly in relation to sustainable fishing practices, as evidenced by the minutes of the different Joint Committees. One example is the decision taken in the framework of the SFPA with Morocco to authorise exploitation of fishing opportunities available for category 3 (small-scale fishing in the south) with a different fishing gear based on a scientific advice provided by the Joint Scientific Committee.

3.3.4 Provisions of SFPAs in relation to utilisation of fishing opportunities

SFPAs reviewed in the frame of this evaluation included a provision where a reduced level of exploitation of fishing opportunities is established. The provision in this respect was a termination of the SFPA or of their implementing Protocols. This provision was never triggered by the EU party.

The review also indicated that few Protocols had relevant provisions for revision of the financial compensation for access where substantial changes of fishing conditions are implemented by the partner third country, with a direct impact on the level of fishing opportunities negotiated, such as establishment of new no-take zones, or implementation of new technical measures impacting accessibility of stocks. The exceptions noted included a provision in the Protocol implementing the SFPA with Kiribati between 2012 and 2015 (i.e. fishing opportunities may be revised in case of closure of a substantial part of the EEZ), the Protocol implementing the SFPA with Guinea Bissau between 2014 and 2017 and between 2019 and 2024 (i.e. implementation of new time-area closures), and the Protocol implementing the SFPA concluded with Seychelles between 2020 and 2026 which included the opportunity for the EU to request an adaptation of the financial contribution following substantial changes in the policy affecting the relevant provision of the Protocol. In the context of Morocco, the absence of a relevant clause prevented a discussion on the adaptation of the EU contribution for access after the unforeseen implementation by the partner third country of a time-area closure affecting the operational capacities of the EU fleet in category 4 under the 2014-2018 Protocol. A comparable situation occurred in Senegal with the prohibition of fishing for live bait in previously authorised areas imposed by the authorities in 2020.

3.4 Scientific monitoring of fisheries exploited by EU vessels in the waters of partner third countries

3.4.1 Availability of scientific advice to inform the implementation of SFPAs

Stocks of highly migratory species

The status of the stocks of highly migratory species subject to fishing opportunities under all SFPAs (except Greenland) is assessed on a regular basis by the scientific committees established by relevant RFMOs (i.e. ICCAT for the Atlantic Ocean, IOTC for the Indian Ocean and WCPFC for the Western Central Pacific Ocean). The RFMOs scientific committees

use data provided by their contracting parties concerning *inter alia* catch and by-catch, fishing effort and biological parameters. The scientific committees issue scientific advice considered by the RFMO's Commissions (i.e. the plenary) in the adoption of conservation and management measures aimed at i) conserving / restoring stocks of commercial species; and ii) mitigating the impacts of fishing operations on the broader environment to protect ecosystems and sensitive species.

Stocks in the waters of Greenland

The status of stocks of demersal and small pelagic species subject to fishing opportunities under the multispecies SFPAs concluded with Greenland is assessed by the International Council for the Exploration of the Sea (ICES) which also advises the international community for fisheries in the North East Atlantic. For straddling stocks present in the Western waters of Greenland, the North-Atlantic Fisheries Organisation (NAFO) provides scientific advice. Both ICES and NAFO provide regular reviews of the status of exploited stocks.

Non-tuna stocks in the waters of African coastal States

The status of stocks of demersal and small pelagic species subject to fishing opportunities under the multispecies SFPAs concluded with coastal States in Africa (Morocco, Mauritania, Guinea Bissau, Senegal and The Gambia) is assessed by the Fishery Committee for the Eastern central Atlantic of the FAO (FAO-CECAF) based on the results of stock assessments produced by different working subgroups (small pelagic / demersal – north / south). The following table shows the years during which the different FAO-CECAF working groups met.

Table 14: Meetings of the four FAO-CECAF scientific working subgroups since 2012

CECAF working subgroups	2012	2013	2014	2015	2016	2017	2018	2019
North / small pelagic	x				x	x	x	x
North / demersal		x				x		x
South / small pelagic							x	
South / demersal						x		

Source: Reports published on the CECAF website as at May 2021⁴⁷

Unlike tuna RFMOs, scientific advice was provided by FAO-CECAF on an irregular basis. For the sub-working group in charge of small pelagic species in the North (from Morocco to Guinea Bissau), meetings have resumed on an annual basis since 2016, after four years of interruption. For the sub-working group on demersal species in the North, two meetings took place in a recent past (2017 and 2019) also after four years of interruption. For the sub-working groups in charge of stock assessment of fish stocks in the South, only one meeting has occurred since 2012 (2017 for demersal species and 2018 for pelagic species). The CECAF Scientific Sub-Committee in charge of reviewing the outputs of the sub-working groups has only met in 2015 and 2018 since 2011. In 2020, the CECAF sub-working groups could not meet, probably as a result of the COVID pandemic. A CECAF sub-working group on small pelagic species met virtually in 2021 (report not yet available).

Scientific advice available to inform the implementation of multispecies SFPAs is complemented by scientific advice provided to the Joint Committee by the Joint Scientific Committees (JSC) created under the framework of the multispecies SFPAs and their implementing Protocols. As shown in the following table, JSCs broadly met on the annual basis foreseen in the Protocols with some exceptions. The period starting in 2020 is also exceptional with the COVID pandemic imposing organisation of virtual meetings with agendas different from the "standard" (Morocco 2020, Mauritania 2021, Morocco 2021).

⁴⁷ The CECAF scientific reports are available at <http://www.fao.org/cecaf/publications/full-list/en/>

Table 15: Meetings of the Joint Scientific Committees held under the framework of the multispecies SFPAs concluded with Morocco, Mauritania, Senegal and Guinea-Bissau

	2013	2014	2015	2016	2017	2018	2019	2020	2021
Morocco			X		X	X		X	X
Mauritania	X	X		X	X	X	X		X
Senegal				X	X	X			
Guinea Bissau			X	XX	X				

Source: Reports of the Joint Committee

Note: Grey cells: no Protocol in force during most of the year

3.4.2 Summary of the status of stocks exploited by the EU fleet under SFPAs

Preliminary note: the relative importance of the EU fleet in fisheries covered by SFPAs

Highly migratory species

Highly migratory species are included in the framework of all SFPAs, except in the case of Greenland. As shown in the following table, EU catch of the main commercial highly migratory species represented 32% of total catch in the Atlantic Ocean on average between 2017 and 2019, 14% in the Indian Ocean and 1% in the Western Central Pacific Ocean on average over the same period. Previous studies⁴⁸ revealed that between 50% and 55% of catch obtained by the EU purse seine segment was obtained in the high-seas, hence 45%-50% from waters under the jurisdiction of coastal States within the framework of SFPAs or through direct authorisations negotiated by the relevant EU operators.

Table 16: Relative proportion of catch of highly migratory species obtained by the EU fleet in the different oceans (average between 2017 and 2019), with indication of the share of EU catch obtained in international waters

(tonnes – average 2017-2019)	Indian Ocean	Atlantic Ocean	Western Central Pacific Ocean
Catch all fishing entities	1 850 016	604 074	2 925 356
EU catch	257 893	192 741	15 505
% EU catch	14%	32%	1%
% of EU tuna catch obtained in international waters	50%	55%	52%

Source: Statistics published by IOTC (Indian Ocean), ICCAT (Atlantic Ocean) and WCPFC (Western Central Pacific Ocean). Regional studies (see footnote 48 for references) for the share of EU catch in international waters

Other species

The following table shows information available on the relative importance of EU catch compared to total catch in the waters of Morocco, Mauritania and Guinea Bissau (multispecies SFPAs). For Greenland, the indicator is not relevant due to parts of fishing opportunities negotiated under the SFPAs being transferred to other fishing entities, and not necessarily exploited in the waters of Greenland.

⁴⁸ Poseidon et al. (2013). Revue des Pêcheries Thonières dans l'océan Atlantique Est. SC5 under FWC MARE/2011/01; Poseidon et al. (2014). Review of tuna fisheries in the Western Indian Ocean. SC7 under FWC MARE/2011/01; Poseidon et al. (2013). Review of tuna fisheries in the Western and Central Pacific Ocean. SC6 under FWC MARE/2011/01

Table 17: Relative importance of EU catch in the waters of partner coastal States in the framework of multispecies SFPAs

Partner third country	% EU catch vs total catch in national waters
Morocco	6% for total catch (all species included) 7% for demersal fish species 5% for small pelagic species
Mauritania	9%-12% for total catch (all species included) 10% for small pelagic species 11%-27% for demersal fish species 60-75% for crustacean species
Guinea Bissau	14 % for total catch (all species included) 15%-20% for demersal / cephalopods species ≈ 50% for crustacean species

Source: *Ex-post evaluations (Morocco and Mauritania) – report of the 2017 meeting of the Joint Scientific Committee and CIPA statistical bulletin (2017) for Guinea Bissau*

Note: *Estimates are based on available catch data which may not include all non-EU catch in certain contexts*

- Morocco: EU catch represented close to 6% of total catch in the Atlantic waters of Morocco (period 2014-2017). The proportion is broadly similar for catch of small pelagic species, and close to 7% for demersal fish species. The EU fleet does not have fishing authorisations to exploit cephalopod and crustacean species in the waters of Morocco.
- Mauritania: depending on the years, the EU fleet represented between 9% (2016) and 12% (2017) of total catch in the waters of Mauritania. For small pelagic species, EU catch represented 10% of total catch these two years. The EU was the major fishing entity catching crustacean species (i.e. shrimps) with 60-75% of total catch. For other demersal fish species, EU catch represented 11% (2016) and 27% of total catch in the waters of Mauritania.
- Guinea Bissau: information available suggests that the EU fleet represented 14% of total catch, between 15% and 20% of total industrial catch of demersal fish / cephalopods species, and about 50% of total catch of crustacean species in the national waters. In the case of Guinea Bissau, these indicators should be considered cautiously due to the relatively poor coverage of the national fish statistical system.

These three examples show that the EU fleet is only one of the fishing entities exploiting the resources available in the waters of the partner third countries. The percentages available suggest that the EU share of total catch is generally relatively modest, except for some niche fisheries such as crustaceans (i.e. shrimps) requiring high levels of fishing technology and know-how .

Status of stocks exploited by the EU fleet in the framework of SFPAs

Annex 7 provides a summary of the evolution of key commercial stocks exploited in the framework of SFPAs based on scientific publications available from FAO-CECAF for non-tuna species in the Central Eastern Atlantic, and tuna RFMOs (ICCAT, IOTC and WCPFC).

Small pelagic species

The results of the assessment of the stocks of small pelagic species in the waters of coastal States of the northern region of Africa published by FAO-CECAF shows that some species targeted by the EU fleet in the framework of SFPAs concluded with Morocco and Mauritania have been consistently within sustainability limits since 2016 (Annex 7). This concerns in particular the sardine (*S. pilchardus*) shared between Morocco and Mauritania, and Spanish

mackerel (*S. colias*) stocks. The horse mackerel stocks (*T. trecae* and *T. trachurus*) which were overexploited until the 2018 assessment was assessed as being within sustainability limits in 2019. According to CECAF, this was due to a decrease in fishing mortality in 2016 and 2017 as well as an improvement in fishing mortality recruitment index for Atlantic horse mackerel.

However, some coastal stocks of small pelagic species have been consistently assessed as overexploited. This concerns the stocks of bonga (*E. fimbriata*), a coastal species not exploited by the EU fleet, and the stocks of sardinellas (*S. aurita* and *S. maderensis*) currently caught as by-catch by EU vessels targeting other small pelagic species. Both stocks are of particular importance for artisanal fishing communities due to their availability in the inshore zones exploited by artisanal vessels and their affordable prices commensurate with the purchasing power of the population.

The overexploited status of stocks of sardinellas was detected by CECAF in assessments carried out in 2000. Access to sardinellas stocks for EU vessels was decreased in 2012 by authorising activities of EU industrial pelagic trawlers only further offshore in the Northern waters of Mauritania (off 20 nautical miles), where abundance of sardinellas is lower. Also, quotas were reduced for all pelagic species, from 440 000 tonnes (under the 2006-2012 EU-Mauritania Protocol) to 300 000 tonnes (under the 2012-2014 Protocol) and then to 225 000 tonnes under the 2015-2021 Protocol.

As a result, EU catch of sardinellas decreased significantly, from 150 000 tonnes in 2010, to less than 10 000 tonnes in 2018. However, catches of sardinellas by national and chartered foreign fleets considerably increased in the waters of Mauritania, completely offsetting the effects of catch reductions by the EU and other foreign industrial fleets on the exploitation status of the sardinella stocks. Catch increases in Mauritania have been driven by the fish meal factories' demand for raw material, with negative impacts on food security in West Africa⁴⁹.

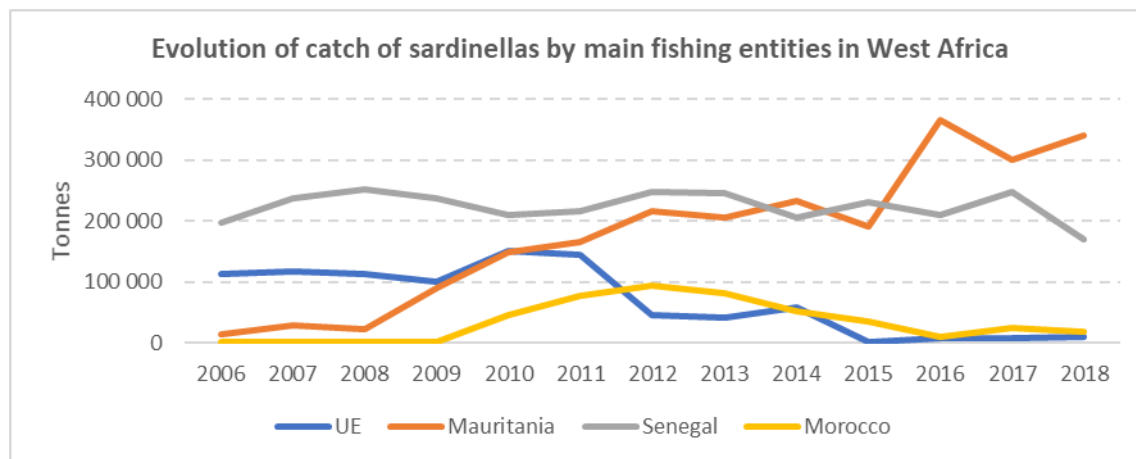


Figure 8: Evolution of catch of sardinella by EU, Mauritania, Morocco and Senegal between 2006 and 2018

Source: FAO FISHSTAT Regional CECAF production database version 2020-07-01

Demersal species

⁴⁹ DAI, 2015. Étude sur l'évolution des pêcheries de petits pélagiques en Afrique du Nord-Ouest et impacts possibles sur la nutrition et la sécurité alimentaire en Afrique de l'Ouest. Rapport final. DG DEVCO – ARES(2015)2984964

As shown in Annex 7, only a limited number of demersal stocks are assessed by CECAF working groups. The 2017 CECAF North working group⁵⁰ produced a stock assessment for 26 stocks of fish, crustacean and cephalopods species, satisfactory results available for 19 of the 26 stocks assessed. Nine stocks were assessed as overexploited, seven as fully exploited and three as not fully exploited. For seven other stocks, the results obtained from the models based on available data were not conclusive. Compared to previous assessments (2013), the 2017 working subgroup established that several stocks showed signs of recovery. The 2019 CECAF working subgroup⁵¹ confirmed that several stocks continued to show signs of recovery. However, for the 22 stocks assessed out of 27, thirteen were found overexploited, six fully exploited and three not fully exploited.

Concerning stocks exploited by the EU fleet within the framework of multispecies SFPAs, the information available suggests that the shrimp stocks exploited by the EU fleet in the framework of the SFPAs concluded with Mauritania consistently remained within sustainability limits. Exploitation status for other fish species exploited in the framework of the SFPAs concluded with Morocco and Mauritania was variable, but those fish species are mostly by-catch species, or caught in low quantities in mixed fisheries by the artisanal EU fleet authorised to access the waters of Morocco in the framework of the SFPAs.

An issue of concern is the status of the stocks of black hake (*M. senegalensis* and *M. polli*) assessed in 2019 as overexploited by CECAF after having been assessed as not fully exploited in 2013 and fully exploited in 2017. Black hake are, subject to catch limits, the target species of EU demersal trawlers authorised in Morocco (Cat. 4), Mauritania (Cat. 2 and Cat. 2bis), The Gambia and Senegal (the limited 'hake component' of these two SFPAs). In addition, black hake are potentially caught as by-catch by industrial trawlers targeting small pelagics, authorised in the waters of Guinea Bissau, Morocco and Mauritania. The following figure shows that catch of black hake by EU fleets tripled between 2014 and 2018, but returned to close to their 2016 level (\approx 8 500 tonnes) in 2019 and 2020.

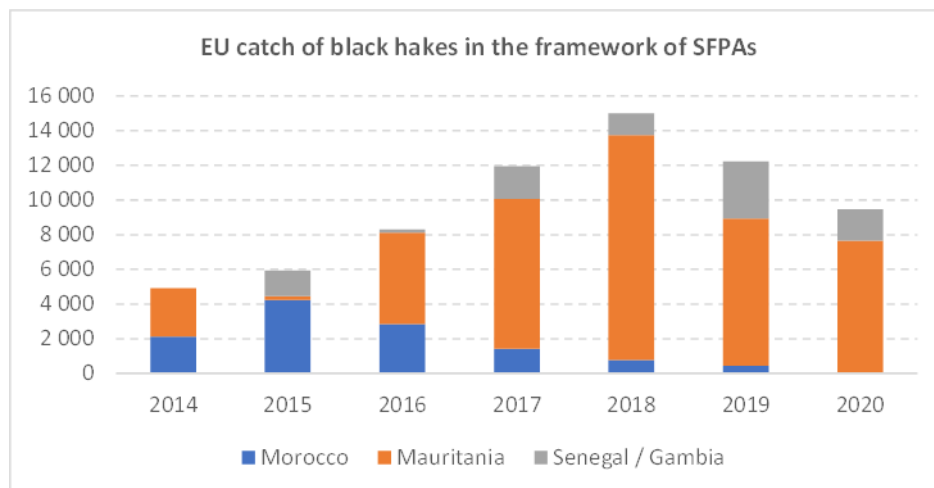


Figure 9: EU reported catch of black hakes in the framework of the SPAs concluded with Morocco, Mauritania, The Gambia and Senegal

Source: DG MARE ACDR database

⁵⁰ FAO. 2018. Report of the FAO/CECAF Working Group on the Assessment of Demersal Resources – Subgroup North. Tenerife, Spain, from 6 to 15 June 2017/Rapport du Groupe de travail FAO/COPACE sur l'évaluation des ressources démersales – Sous-groupe Nord. Tenerife, Espagne, du 6 au 15 juin 2017. CECAF/ECAF Series/COPACE/PACE Séries. No. 18/78. Rome, FAO. Licence: CC BY-NC-SA 3.0 IGO.

⁵¹FAO. 2020. Report of the FAO/CECAF Working Group on the Assessment of Demersal Resources – Subgroup North Nouakchott, Mauritania, 2–10 December 2019 / Rapport du Groupe de travail FAO/COPACE sur l'évaluation des ressources démersales – Sous-groupe Nord Nouakchott, Mauritanie, 2–10 décembre 2019. CECAF/ECAF 20/83. Rome. <https://doi.org/10.4060/cb1539b>

Note: Species considered for extraction include *M. polli* (HKB), *M. senegalensis* (HKM) and *Merluccius spp.* (HKX)

It should be also noted that there are no scientific assessments of some stocks targeted by the EU fleet within the framework of the SFPAs concluded with Morocco and Mauritania, such as Atlantic pomfret (*B. brama*) caught by longliners in Mauritania and Morocco or black scabbardfish (*T. lepturus*) caught in Morocco.

Highly migratory species

Annex 7 displays the evolution of the status of the main tuna commercial species over time according to the relevant RFMOs. In summary:

- In the Atlantic Ocean, the stock of skipjack (*K. pelamis*) is exploited sustainably. The status of the stock of yellowfin (*T. albacares*) and albacore (*T. alalunga*) improved over time, and is now within sustainability limits. The status of the stock of bigeye (*T. obesus*) tended to deteriorate over time, and is now currently in an overexploited state.
- In the Indian Ocean, the stock of skipjack is exploited sustainably, but the stock indicators for yellowfin, bigeye and albacore deteriorated over time. In particular, the stock of yellowfin has been an overexploited state since 2015.
- In the Western Central Pacific Ocean, the stocks of the four main tuna species are currently within sustainability limits.

The following table summarises the most recent information available on the status of the stocks of major tuna species in the Atlantic Ocean and in the Indian Ocean considering the position of the fishing pressure indicator and of the biomass indicator compared to the target values (i.e. MSY generally). For the Western Central Pacific Ocean (not included in the table), the stock indicators for the four major tuna species are all in the green quadrant.

Table 18: Stock status indicators for the four major tuna species exploited by the EU fleet in the Atlantic Ocean and in the Indian Ocean

Tuna species	Fishing pressure indicator	Biomass indicator	Stock status indicator	Assessment year
Atlantic Ocean				
Skipjack (Eastern stock)				2014
Yellowfin				2019
Bigeye				2018
Albacore (North Atlantic stock)				2016
Indian Ocean				
Skipjack				2020
Yellowfin				2018
Bigeye				2019
Albacore				2019

Source: Stock assessment results published by the ICCAT (Atlantic Ocean) and the IOTC (Indian Ocean)

Added value of the Joint Scientific Committees

Based on the review of the reports of the different Joint Scientific Committees held since 2013 in the framework of the SFPAs concluded with Guinea Bissau, Mauritania, Morocco and Senegal, the following elements emerge:

- The Joint Scientific Committees reviewed indicators available on the exploitation of stocks targeted by the different fishing categories of EU vessels authorised such as

total catch, abundance index (catch per unit effort, scientific surveys when available) and available biological parameters. The participating EU scientists often provided mappings of EU fishing activities based on VMS data, which were useful to deepen analysis on potential interactions between the different fishing entities involved.

- The Joint Scientific Committees could not produce new stock assessments or updates of existing stock assessments, but used the information available, mostly from CECAF (and RFMOs for tuna species), and the exploitation indicators detailed above to issue recommendations to the Joint Committees on exploitation levels. In most cases, the recommendations were not to increase fishing pressure, except in one case (Mauritania 2013) with a suggestion that fishing pressure on black hake could be increased. When specifically asked by the Joint Committee to provide a quantitative assessment of a surplus (e.g. EU-Mauritania Joint Scientific Committee 2016), the Joint Scientific Committees were not able to provide such an assessment. The main reasons given were: i) lack of comprehensive data on catch (landed and discarded) and effort for the different fleets; and ii) no established allocation key between the different coastal states sharing the same stocks.
- The Joint Scientific Committees identified data gaps and issued recommendations to the Joint Committees to address shortcomings. A recurrent recommendation was to increase the scientific observer coverage on all relevant fleets and to increase the sampling intensity of commercial species.
- In some cases, the Joint Scientific Committees were required to answer specific questions asked by the Joint Committee when modifications / adaptations to the Protocol were considered. This concerned in particular *inter alia* the use of traps by the artisanal vessels in category 3 in Morocco, adaptation of time-area closures (e.g. *repos biologiques*) in Mauritania and Morocco, identification of deep-sea cephalopod species exploited by vessels in categories 2 and 2bis in Mauritania, limits of authorised fishing areas in Mauritania (shrimps, small pelagic species), and a potential one-month closure of fisheries in Guinea Bissau. **All advice from the Joint Scientific Committees for amendments of the SFPAs was followed up by the Joint Committees**, except one instance related to the identification of deep-sea cephalopod species in Mauritania⁵² (EU-Mauritania Joint Scientific Committee 2018).
- The Joint Scientific Committees could not make recommendations on measures to mitigate the impacts of fishing activities on the broader environment (ecosystem approach) due to lack of data available. In particular, the Joint Scientific Committees could not propose measures to reduce discards by some fishing categories although there were indications of their relative importance through observers' feedback. Instead, they proposed recommendations to implement specific research programmes to support identification of measures for the mitigation of impacts. Lack of information available also prevented scientific work on potential unwanted catch of protected species by non-tuna vessels, on impacts of fishing on deep-sea vulnerable marine ecosystems below 400m and on the socio-economic dimensions of fisheries exploited by EU vessels.

The Joint Scientific Committees also contributed to building up of or improving scientific capacities in the partner countries. The review of the reports shows that about 40 different scientists from the four relevant partner third countries participated in the different meetings organised since 2015.

⁵² The recommendation was « *Le CSC, après analyse des prises de la pêche 2bis, a remarqué que l'essentiel des captures de céphalopodes de ce segment est constitué de calamar profond (ou encornet) et suggère par conséquent à la Commission mixte d'examiner cette question, y compris en envisageant une éventuelle redéfinition du terme « calamars » utilisé dans le protocole pour y inclure aussi les « calamars profonds (ou encornets) » ou une inclusion des céphalopodes profonds comme une espèce accessoire commerciale dans la pêche* ». However, consideration of deep-sea cephalopods was introduced in the Protocol negotiated in 2021.

Scientific experts involved in the different meetings were consulted on the effectiveness of the Joint Scientific Committees during this evaluation. Feedback received suggests that:

- It is sometimes difficult for the JSC to fully understand the needs of the Joint Committees in terms of scientific advice due to imprecise questions, or lack of detailed agendas in some cases (Guinea Bissau).
- Consolidation and harmonisation of data mobilises a substantial part of the meetings. According to participants, between 50% and 80% of the time available is used for data consolidation at the expense of time available for analysis.
- It is relatively common that there is no follow-up on recommended scientific studies. Participants suggested that the SFPAs might dedicate a specific financial envelope to support their implementation.
- Participants consulted could not comment on the synergies with sectoral support activities in the absence of relevant information on activities implemented, but noted that any activities supporting scientific data collection by the partner third countries are relevant. Some participants noted that some other EU initiatives implemented outside the scope of SFPAs were particularly relevant, such as the recent training of scientific observers funded under a DG MARE/ EASME contract.
- Finally, scientists mentioned that the meetings of certain Joint Scientific Committees were not always free from political interferences, particularly when representatives of the managing authorities attended.

Box 3: the surplus concept

According to Article 31.4 of the CFP Regulation (EU) 1380/2013, EU vessels shall only catch surplus of the allowable catch as referred to in Article 62(2) and (3) the United Nations Convention of the Law of the Sea (UNCLOS), and identified in a clear and transparent manner on the basis of the best available scientific information. Article 4.33 of the CFP Regulation defines the surplus as “*that part of the allowable catch which a coastal State does not harvest, resulting in an overall exploitation rate for individual stocks that remains below levels at which stocks are capable of restoring themselves and maintaining populations of harvested species above desired levels based on the best available scientific advice*”. In a nutshell, the surplus of a stock may be defined as its annual potential catch at sustainable level minus the potential catch of the national fleet according to its capacity to harvest the entire allowable catch.

A scientific study commissioned by DG MARE in 2016⁵³ established that the determination of the surplus is relatively complex, requiring i) consideration of the management objectives set out by the third country, ii) compilation of stock parameters, such as MSY , F_{MSY} , catch for assessed stocks, and proxies for fishing mortality for non-assessed stocks, and iii) computing values of the surplus on a stock by stock basis according to options⁵⁴, taking into account uncertainty observed in some stock assessments. For straddling stocks such as stocks of small pelagic species or black hake assumed to extend between Morocco and Guinea Bissau, the determination of a surplus in the waters of a coastal State require, to start with, identification of a regional surplus and a distribution key of the surplus between the different coastal States involved.

The surplus concept is not applicable to tuna and tuna-like species which are highly migratory and mainly found in areas beyond national jurisdictions. For these reasons, as stated by the United Nations Fish Stock Agreement and UNCLOS and by the EU CFP Regulation, the determination of the tuna and tuna-like resources available for access in the framework of tuna SFPAs should take into account scientific assessments conducted at the regional level as well as conservation and management measures adopted by relevant tuna RFMOs.

Source: own elaboration

⁵³ García-Isarch, E., Gascuel, D., Guijarro, E., Gaertner, D., Merino, G., Coelho, R., Rosa, D., Murua, H., Wakeford, R., Jouffre, D., Figueiredo, I., and Abaunza, P. 2016. Scientific advice on the estimation of surplus for Sustainable Fisheries Partnership Agreements. Specific Contract No. 10 under Framework Contract No. MARE/2012/21. Final Report. April 2016. 133 pp.

⁵⁴ In essence i) constant fishing effort, ii) constant proportion of catch due to the coastal State and iii) constant catch

3.4.3 Provisions of SFPAs for adaptation of fishing opportunities

All SFPAs reviewed during this evaluation included a clause for revision of fishing opportunities where scientific advice so warrants. The provision for revision of fishing opportunities based on scientific advice was used at least twice during the recent period for multispecies SFPAs: an increase of the fishing opportunities on black hake in Mauritania in 2017 through the introduction of a new fishing category (i.e. category 2bis), and a decrease of 15% of the quota available for industrial small pelagic trawlers in Morocco during the last six-month period of the 2014-2018 Protocol, with in both cases a corresponding adjustment of the EU financial contribution for access.

3.5 Socioeconomic interactions between EU Fishing vessels and the fishing sector in the partner third countries

3.5.1 Landings in the partner third countries

From the partner third countries perspective, landings in national ports are considered as an entry point for increased economic interactions between EU fishing vessels and the national fishing sector. These interactions generate direct income for the States in the form of port dues and taxes on landings, and pave the way for indirect economic benefits through local processing of catch, purchase of supply (e.g. fuel, food, consumables) and easier logistic conditions for placing national seamen onboard the vessels. EU vessel landings in the partner country may also contribute to the supply of the national market, with positive effects on food security and nutrition⁵⁵.

These increased economic interactions also support government communication on the benefits of the SFPAs concluded with the EU.

The Protocols implementing the different SFPAs have three main types of provisions in relation to landings in the ports of the partner third countries:

- Provisions mandating landings in the port of partner third countries: such provisions are applicable in the case of Gabon, Mauritania, Morocco and Senegal. In Gabon, the provision concerned 30% of catch in national waters, but was conditioned by the existence of operational processing industries (which was not the case before the expiry of the Protocol in 2016). For Mauritania, the Protocol established that 100% of fisheries products should be landed or transhipped in national ports, with some exceptions (e.g. tuna fishing vessels, last trip for pelagic vessels). For Morocco, the prescriptions concerned some fishing categories (e.g. 30% by vessel by quarter for artisanal purse seiners and demersal trawlers and longliners, 25% of reported catch for tuna pole and liners and industrial pelagic trawlers and seiners). For Senegal, the provision concerned only tuna pole and liners for 100% of their catch.
- Provisions incentivising landings in the port of partner third countries: the incentive proposed by the Protocols was in the form of a discount on the access fees. Such provision applied in the case of Cabo Verde (until 2018), Liberia and Madagascar.
- Protocols with no specific binding provisions⁵⁶ in relation to landings in the port of the partner third countries: Comoros, Cook Islands, Côte d'Ivoire, Kiribati, Greenland, Guinea Bissau, Mauritius, São Tomé-et-Príncipe and Seychelles.
- In addition, or in complement, to provisions on landings, Protocols may include provisions mandating landing of an in-kind contribution for access resulting in a proportion of catch to be donated by EU shipowners to the partner third country in exchange for access (i.e. Guinea Bissau as from 2019, Mauritania as from 2012).

⁵⁵ Fish is rich in Omega-3 fatty acids with positive nutritional impacts for pregnant women and children.

⁵⁶ Some Protocols had provisions but mostly to encourage EU operators to endeavour to use local ports.

The table below summarises the provisions of the Protocols and identifies the extent to which landings of fisheries products occurred, based on the findings of the ex-post evaluations of each Protocol.

Table 19: Provisions of Protocols in relation to landings in ports of partner third countries and occurrences of landings

Countries	Landing provisions	Landings occurred ?
Cabo Verde	Incentivised (until 2018*)	Yes
Comoros	No provision	No
Cook Islands	No provision	No
Côte d'Ivoire	No provision	Yes
Gabon	Mandated (conditional)	No
The Gambia	No provision	No
Greenland	No provision	Some
Guinea Bissau	No provision (except in-kind contribution as from 2019)	No
Kiribati	No provision	Yes
Liberia	Incentivised	No
Madagascar	Incentivised	Yes
Mauritania	Mandated (including in-kind contribution)	Yes
Mauritius	No provision	Some
Morocco	Mandated	Yes
São Tomé	No provision	No
Senegal	Mandated	Yes
Seychelles	No provision	Yes

Source: *Protocols for landing provisions / Ex-post evaluations of Protocols for occurrence of landings*
 Note: * The Protocol signed in 2019 with Cabo Verde did not carry over the incentive

For Protocols mandating landings in the ports of the third countries, the provision was generally complied with by EU vessels, albeit with some difficulties in some cases (e.g. Morocco). In the case of Kiribati and Senegal, compliance was relatively straightforward as the clause did not entail deviations from regular shipowner strategies. In the case of Morocco and Mauritania, the provisions required some adaptations by the EU shipowners concerned from the practices that might otherwise have been the case in the absence of obligations⁵⁷.

For Protocols considering a financial landing incentive, landings occurred in Cabo Verde and Madagascar but not in Liberia. In the case of Cabo Verde and Madagascar, use of national ports was already part of the strategies of the EU vessels when they are operating in the waters nearby. The ports of these two partner third countries offer acceptable berthing conditions and marketing opportunities for landed catch. For Liberia, no local landings occurred. However, in these three cases, the effect of the incentive was probably relatively marginal. In the case of Cabo Verde and Madagascar, EU shipowners did not request the rebate on access fees due to the reported disproportionate administrative burden entailed. For Liberia, the use of the national port was precluded by inappropriate conditions, lack of adequate local services to supply the vessels and lack of opportunities to process part of the catch locally (e.g. fish processing industries).

For Protocols not mandating local landings, Table 19 shows the EU vessels concerned used the ports on their own initiative in Cote d'Ivoire and Seychelles to land their catch. Some relatively anecdotal voluntary landings also occurred in Greenland and Mauritius. The

⁵⁷ In the case of Mauritania, Canary Islands would have been the preferred ports. In the case of Morocco, fishing vessels would have used Canary Islands or the neighbouring ports in Andalucía to land their catch.

attractiveness of Côte d'Ivoire and Seychelles was underpinned by key factors such as adequate port conditions, availability of services, proximity of fishing grounds and presence of industrial industries with the capacity to process part of their landings. No landings occurred in Comoros, Cook Islands, The Gambia, Guinea Bissau and São Tomé-et-Príncipe due to the absence of one or several of these key factors underpinning their attractiveness for EU operators. In some way, the relevant Protocols recognised this and did not seek to introduce prescriptions that would not have been complied with by EU operators or would have deterred utilisation of fishing opportunities, with negative impacts on the quality of the partnership.

Landings in the ports of the partner third countries does not necessarily mean that products landed will contribute to supply the local markets and the processing industries. According to the findings of the ex-post evaluations, sale of EU fisheries products other than tuna on local markets was an exception. For Morocco and Mauritania, almost all catch landed in the national ports was sold on the EU market or exported to other countries after transport by reefers for frozen products or by truck for fresh products. The main reason put forward by relevant EU operators was availability of existing market outlets paying prices higher than those proposed by local buyers. For tuna products, the situation was different: the tuna processing industries often located quayside in Cabo Verde, Cote d'Ivoire, Madagascar, Mauritius and Seychelles had the capacity to buy part of the EU landings at prices aligned with international prices to complement other sources of supply. The ability of these industries to pay adequate prices was underpinned by opportunities for the processed products to enter the EU market (e.g. compliance with SPS rules and IUU rules) under the applicable quota-free and duty-free trade arrangements (e.g. EBA / GSP+ trade regime, Economic Partnership Agreements and other specific trade arrangements - see Table 6) granted to originating products. EU catches that were landed supported the local processing industries and the local employment that depend on them.

Certain past Protocols (e.g. Senegal until 2006) introduced provisions for mandatory sales of fisheries products to local industries. However, the clause did not work because of the market distortion it introduced into the commercial relationship between the seller and the buyer, at the disadvantage of the former.

Some partner third countries received fish supply from the EU fleet:

- In Cabo Verde, Cote d'Ivoire, Madagascar, Mauritius Seychelles and Senegal where EU tuna vessels call regularly or occasionally, EU fishing vessels sell their by-catch on the local market. The flow is particularly important in Cote d'Ivoire and Seychelles (around 15 000 tonnes annually on average landed by all purse seine fleets) which are the main logistical bases of EU purse seiners. In Cote d'Ivoire, the quantities of by-catch (locally called *faux-thon*) are consumed locally after artisanal processing. In Seychelles, by-catches are consumed locally and exported to developing countries.
- In Mauritania, the Protocol starting in 2012 introduced a requirement for small pelagic trawlers to donate an in-kind contribution equivalent to 2% of their catch. The resulting quantities of fish added to the quantities obtained from a similar provision imposed to other foreign small pelagic trawlers, and was distributed by a public entity to the poorest layers of the population at subsidised prices. Between 2018 and 2020, the in-kind contribution of EU pelagic trawlers was close to 2 000 tonnes per year on average, and the total quantity distributed to the local population close to 11 000 tonnes, including contributions from other fleets. An evaluation of the distribution programme⁵⁸ organised by the government underlined its positive contribution to food security and nutrition and suggested improvements to increase

⁵⁸ AECID (2016) Évaluation à mi-parcours du programme Amélioration de l'Accès de la Population Mauritanienne à la Consommation de Poisson comme Renforcement de la Sécurité Alimentaire http://www.cooperacionspanola.es/sites/default/files/evaluation_mi-parcours_paapmcrpsa.pdf

its benefits for the local population. The Protocol concluded in 2019 with Guinea Bissau also foresaw an in-kind contribution to be landed in the country (i.e. 2.5 tonnes per quarter and per vessel for finfish/cephalopods vessels and 1.25 tonnes per quarter and per vessel for shrimp trawlers) which could potentially result in supply of about 200 tonnes of fisheries products annually.

3.5.2 Final markets of fisheries products caught by EU vessels in the framework of SFPAs

The final markets of fisheries products caught by EU vessels within the framework of SFPAs can be assessed as follows based on information from the previous section and feedback from relevant operators. On an annual average over the 2018-2020 period, about 90% of EU catches were sold on the EU market (\approx 255 000 tonnes) and 10% (\approx 27 000 tonnes) on the markets of third countries.

Table 20: Final destination of fisheries products caught by EU vessels in the framework of SFPAs (annual average 2018-2020)

Species groups	Place of processing	Final destination	Tonnes eq. live weight	
			EU	Third countries
Highly migratory species				
Purse seiners / Pole and liners	Processing in third countries	EU	99 655	
Longliners	Unprocessed	EU	2 066	
By-catch (est. 5%)	Unprocessed	Third country		5 354
Small pelagics				
Sardines	Processing in third countries	Third country		\approx 20 000
Sardines, horse mackerel, mackerel	Unprocessed / processing in the EU	EU	\approx 116 790	
In-kind contribution (2% MRT)	Unprocessed	Third country		2 000
Other fish species				
	Unprocessed	EU	29 925	
Cephalopods				
	Unprocessed	EU	791	
Crustaceans				
	Unprocessed	EU	5 867	
Total			255 094	27 354

Source: Based on ex-post evaluations with landing data updated

- For highly migratory species, most catches are consumed on the EU market after processing (canning, loining) in the EU and in third countries. An estimated 5% of by-catch (*faux-thons*) is sold in the partner third countries where EU vessels unload / tranship.
- For small pelagics, feedback from operators suggests that about half of the sardines caught are sold to canneries in third countries (e.g. South Africa, Brazil) for processing into cans, and consumption on the national or regional markets, and the other half is sold to canneries in the EU (Spain and Portugal in particular). Other small pelagic species (mackerel, horse mackerel) are consumed in the EU. Mauritania obtained an annual average of approximately 2 000 tonnes of small pelagic species through the in-kind contribution (2% of catch obtained) foreseen by the Protocol.

- For other high-value fish species, cephalopods and crustaceans caught in the framework of multispecies SFPAs, catch are consumed on the EU market.

Contribution of EU catch in the framework of SFPAs with EU apparent consumption of fisheries products

The following table compares catches under SFPAs with EU apparent consumption (balance production + import – export) assessed for 2018 by the EUMOFA. The comparison is limited to categories of fisheries products exploited under the framework of SFPAs.

Table 21: Comparison between catch under SFPAs and EU production and apparent consumption of wild-caught species

(tonnes)	SFPAs*	EU Apparent consumption	SFPAs / EU Apparent consumption
Highly migratory species	101 721	1 606 730	6%
Small pelagics	116 790	1 611 506	7%
Other fish species**	29 925	3 174 898	1%
Cephalopods	791	730 859	0%
Crustaceans	5 867	542 947	1%
Total	255 094	7 666 940	3%

Source: based on DG MARE ACDR database extracted 03.04.2021 for catch under SFPAs, EUMOFA (2020) EU Fish Market edition for EU apparent consumption in 2018

Notes: *For SFPAs, catch shown is the average 2018-2020

** For the purpose of this table, "other fish species" are assumed to correspond to the "groundfish" category identified by EUMOFA

Compared to EU apparent consumption of wild-caught species, catch of small pelagics under SFPAs was equivalent to 7% of the needs of the EU market, and catch of highly migratory species 6%. For other categories of products (i.e. cephalopods, crustaceans and other fish species), catch under SFPAs showed an insignificant contribution to the needs of the EU market. In total, EU catch in the framework of SFPAs contributed to 3% of total supply of wild-caught species of the EU market. Compared to total EU apparent consumption (12.48 million tonnes including aquaculture products not included in the previous table according to EUMOFA, such as bivalves and salmonids), the contribution of EU catch to the needs of the EU market was 2% on average per year.

3.5.3 Employment of nationals from partner third countries onboard EU vessels

From the partner third countries perspective, employment of nationals as crew onboard EU vessels benefiting from fishing opportunities is an opportunity to generate additional jobs for the country, and to enhance the levels of qualification and experience of employed seamen for future careers on national or other foreign fishing vessels. Employment of nationals onboard EU vessels also supports government communication about the benefits of the SFPAs concluded with the EU.

The Protocols implementing the different SFPAs have three main types of provisions in relation to employment of nationals from the partner third countries.

- Protocols mandating employment of a certain number of nationals onboard EU vessels. The relevant provisions consider i) a minimum number or proportion compared to total crew of national per vessel (Comoros, Kiribati, The Gambia for trawlers, Guinea Bissau for trawlers, Madagascar, Mauritania, Morocco, Seychelles); or ii) a minimum number of nationals on the whole fishing fleet segment (Cabo Verde, Mauritius, São Tomé-et-Príncipe as from 2019). The numbers or proportion defined by the Protocols varies according to the partner third country. In the case

of Mauritania for example, most EU fishing fleet segments were bound to employ at least 60% nationals as crew onboard. Some provisions also considered an increase in numbers over time (i.e. São Tomé-et-Príncipe).

- Protocols mandating employment of nationals from ACP countries. The relevant provisions considered between 20% or 30% of ACP nationals employed. Such provisions was introduced in the Protocols concluded with Cote d'Ivoire, Gabon, The Gambia for tuna vessels, Liberia, São Tomé and Príncipe (before 2019) and Senegal.
- Protocols not mandating employment of nationals: for some fishing categories involving small-scale EU vessels (i.e. small-scale vessels of categories 2 and 3 operating under the SFPA with Morocco and small-scale longliners operating under the SFPAs concluded with Madagascar and Mauritius), the relevant Protocols provided exemptions to reflect the relatively small number of crew onboard. For some Protocols (e.g. Cook Islands, Greenland, Guinea Bissau for tuna vessels), there were no specific provisions mandating employment of nationals of the countries or ACP nationals onboard EU vessels benefiting from fishing opportunities.

Based on findings from the ex-post evaluations and feedback from targeted consultations, provisions mandating employment of nationals were generally complied with by EU operators, although with some difficulties in some cases (e.g. Morocco). According to minutes of the relevant joint committees, Protocols' objectives were even surpassed in the case of Cabo Verde, Cote d'Ivoire, Madagascar and Senegal. However, there were some situations where the provisions on employment in the Protocols were not fully complied with, such as Mauritius, São Tomé-et-Príncipe and Seychelles, triggering payments by EU shipowners of a financial penalty to the partner third country according to the relevant provisions of the Protocols. According to EU operators, full compliance with SFPA provisions was hindered by insufficient availability of a trained workforce compounded by the transnational dimension of their fishing operations.

A study by the European Parliament⁵⁹ in 2016 established that close to 2 850 third countries nationals were employed as crew on EU vessels, including 2 217 employed on EU tuna vessels and 632 employed on EU non-tuna vessels operating under the multispecies SFPAs concluded with West African countries. The same study also estimated that SFPAs support employment as crew for 3 618 EU nationals (i.e. close to 6 500 jobs in total). There are no indications suggesting that these numbers have changed in the recent past, notwithstanding the impacts of the COVID pandemic in 2020 which led some partner third countries to relax mandatory provisions in relation to the employment of nationals (e.g. Mauritania and Morocco). Indirect employment in the third countries supported by the operations of EU vessels in the framework of SFPAs was estimated to support close to an additional 15 000 jobs in the third countries, mostly in industrial tuna processing plants. About 60% of employment positions in the processing sector (\approx 9 000) are occupied by women.

Employment conditions of third country seamen onboard EU vessels are governed by the so-called social clause introduced in all Protocols. Until recently, the social clause specified the signature of an employment contract to be shared with relevant authorities guaranteeing social security and work insurances to third country workers. The Protocol recently concluded with Seychelles (2020) increased the scope of social benefits to include *inter alia* pension benefits and end of contract's compensation benefits. The Social clause also mandated working conditions meeting the basic working rights laid down in the declaration of the International Labour Organisation (ILO), in particular the freedom of association, the effective recognition of the right to collective bargaining, and the elimination of discrimination. Finally, Protocols also foresaw that wages paid should not be lower than those of crews on national vessels or lower than the level determined by the ILO.

⁵⁹ Impact of fisheries partnership agreements on employment in the EU and in third countries. Research for the PECH Committee IP/B/PECH/IC/2015-181

Employment conditions onboard EU vessels benefiting from fishing opportunities available under SFPAs have been duly considered within the framework of the Joint Committees, in particular in relation to the social clause, minimum wages and training of third country fishers employed onboard EU vessels.

Concerning working conditions, EU social partners consulted during this evaluation have advocated for the introduction of a proposed social clause articulated in seven articles ensuring that employment conditions offered to third country nationals are aligned with the provisions of the Council Directive (EU) 2017/159⁶⁰ which incorporates into EU law the social partners agreement on the ILO convention C.188 Work in Fishing Convention. Based on EU social partners' feedback, the proposed enhanced social clause ensures:

- Full transparency about the procedure of employment of local fishers;
- Full transparency for the involved workers about conditions and pay before signing the contract;
- Full transparency on payments of salaries to local fishers;
- Full involvement of local trade unions in the process, including collective bargaining rights for the local fishers;
- Development of strict training systems on operations and safety for local fishers;
- Free possibility for the local fishers to consult the local unions

Until now, the proposal by EU social partners has not been fully included in the Protocols.

Concerning wages paid to third country nationals, some third countries recently raised possible occurrences of fishers being paid below ILO minimum standards (e.g. Côte d'Ivoire, Senegal, Seychelles). However, there is no minimum wage defined by the ILO for workers in the fishing sector. The ILO minimum wage applies to seafarers on any commercial vessel, except those ships engaged in fishing and similar pursuits⁶¹. However, some EU operators agreed to use the ILO minimum wage for seafarers⁶² as the basis for minimum wages to be paid to the crew employed on their fishing vessels. The two known cases are those of the EU shipowners of tuna purse seine vessels who unilaterally committed to pay the ILO minimum wages to seafarers employed onboard their vessels, and Dutch operators of small pelagic trawlers who negotiated with relevant social partners a Collective Bargaining Agreement committing *inter alia* to pay at least the ILO minimum wages for seafarers to foreign crew.

Concerning training of crew, most EU Member States⁶³ with vessels operating under SFPAs are bound by the provisions of the International Convention on Standards of Training, Certification and Watchkeeping for Fishing Vessel Personnel adopted by the International Maritime Organisation (Convention STCW-F of the IMO), meaning that only personnel having received the minimum levels of training defined by the Convention may be offered employment. Note that Council Decision (EU) 2015/799⁶⁴ authorising EU Member States

⁶⁰ Council Directive (EU) 2017/159 of 19 December 2016 implementing the Agreement concerning the implementation of the Work in Fishing Convention, 2007 of the International Labour Organisation, concluded on 21 May 2012 between the General Confederation of Agricultural Cooperatives in the European Union (Cogeca), the European Transport Workers' Federation (ETF) and the Association of National Organisations of Fishing Enterprises in the European Union (Europêche) (Text with EEA relevance.). OJ L 25, 31.1.2017, p. 12–35

⁶¹ ILO Maritime Labour Convention, 2006, Article II.4

⁶² See https://www.ilo.org/sector/Resources/publications/WCMS_676174/lang--en/index.htm

⁶³ The Convention was ratified by *inter alia* Denmark, France, Latvia, Lithuania, Netherlands, Poland, Portugal and Spain. Some partner third countries also ratified the STCW-F: Gambia, Kiribati, Mauritania and Morocco

⁶⁴ Council Decision (EU) 2015/799 of 18 May 2015 authorising Member States to become party, in the interest of the European Union, to the International Convention on Standards of Training, Certification and Watchkeeping for Fishing Vessel Personnel, of the International Maritime Organization (Text with EEA relevance). OJ L 127, 22.5.2015, p. 20–21

to ratify the STCW-F Convention emphasised the relevance of the instrument in the framework of SFPAs, and recommended encouraging the partner third countries to become parties to the Convention. To date, The Gambia, Kiribati, Mauritania and Morocco have ratified the STCW-F Convention.

EU shipowners reported that the lack of adequate STCW-F training certification prevented employment of nationals of partner third countries onboard their vessels (e.g. Liberia, Mauritius, Seychelles). According to information received, there would be only two training institutes in Africa certified to deliver STCW-F training (Morocco and Namibia), and one in the Western Indian Ocean (France-La Réunion). In most cases, basic STCW-F training of nationals of partner third countries had to be organised by the EU operators at their own cost.

3.5.4 Economic impacts of interactions: distribution of economic value-added between partners

The interactions depicted above between the EU fleet and the partner third countries supported the creation of economic benefits for the EU, the partner third country, but also to other entities deriving benefits from the activities of EU vessels under SFPAs (for example, use of ports in country A when utilising the fishing opportunities available under the SFPAs concluded with country B). According to the economic analysis of the ex-post evaluations implemented in accordance with the methodology promoted by DG MARE⁶⁵, SFPAs supported the creation of an annual economic value-added of EUR 477 million, with EUR 232 million of economic value-added benefiting to the EU, and EUR 245 to third countries (annual average over the 2014-2019 period). The SFPAs concluded with Mauritania, Morocco, Greenland and Seychelles are the basis for 84% of the economic value-added supported by SFPAs as it could be expected based on the value of the different SFPAs.

The comparison between the EU contribution for access (EUR 93 million per year on average between 2015 and 2020 – see page 17) and the economic value-added supported by the activities of the EU vessels in the framework of SFPAs (EUR 477 million) shows that globally, the access component of SFPAs had a clear positive cost-benefit ratio with every 1 EUR invested by the EU in the financial compensation for access supporting the creation of EUR 5.13 economic value added benefiting to the fisheries sectors of the EU and of the partner third countries. The figure below shows the cost-benefit ratio of the EU investment in the financial contribution for access measured in the context of the different ex-post evaluations of recent Protocols. Information available suggests that the ratio was generally lower in the case of multispecies SFPAs (Guinea Bissau, Mauritania, Morocco), compared to tuna SFPAs.

⁶⁵ COFREPECHE, MRAG, NFDS et POSEIDON (2014). Analyse économique de la flotte thonière de l'UE – Note de méthode. Contrat cadre MARE 2011/01 – Lot 3, contrat spécifique n°09. Bruxelles, 32 p.

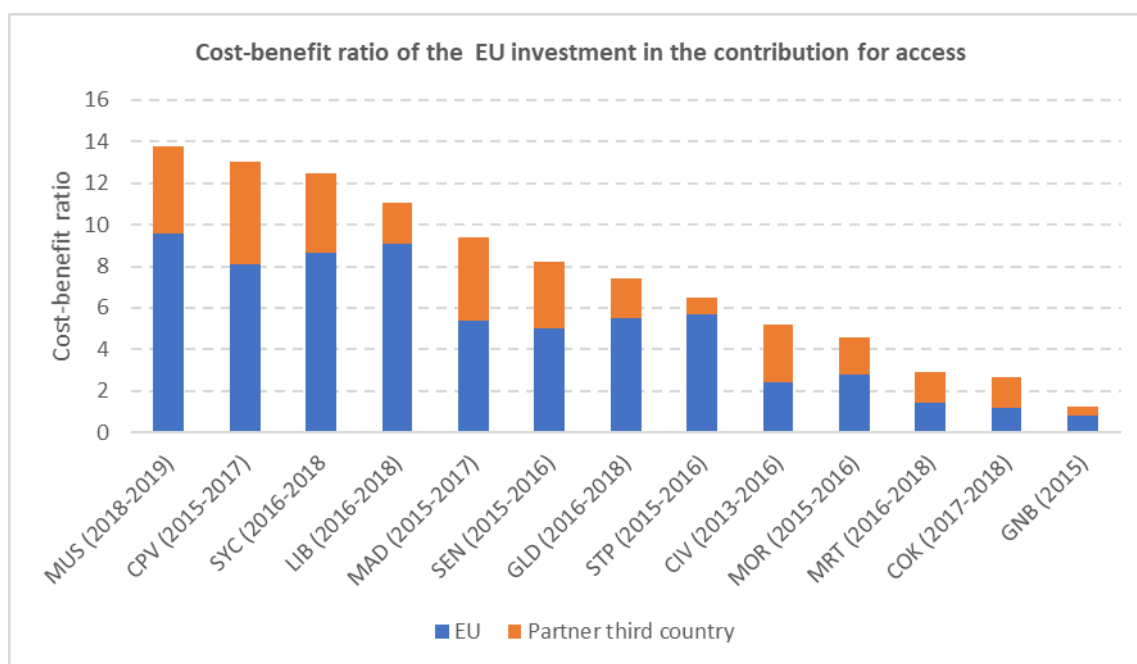


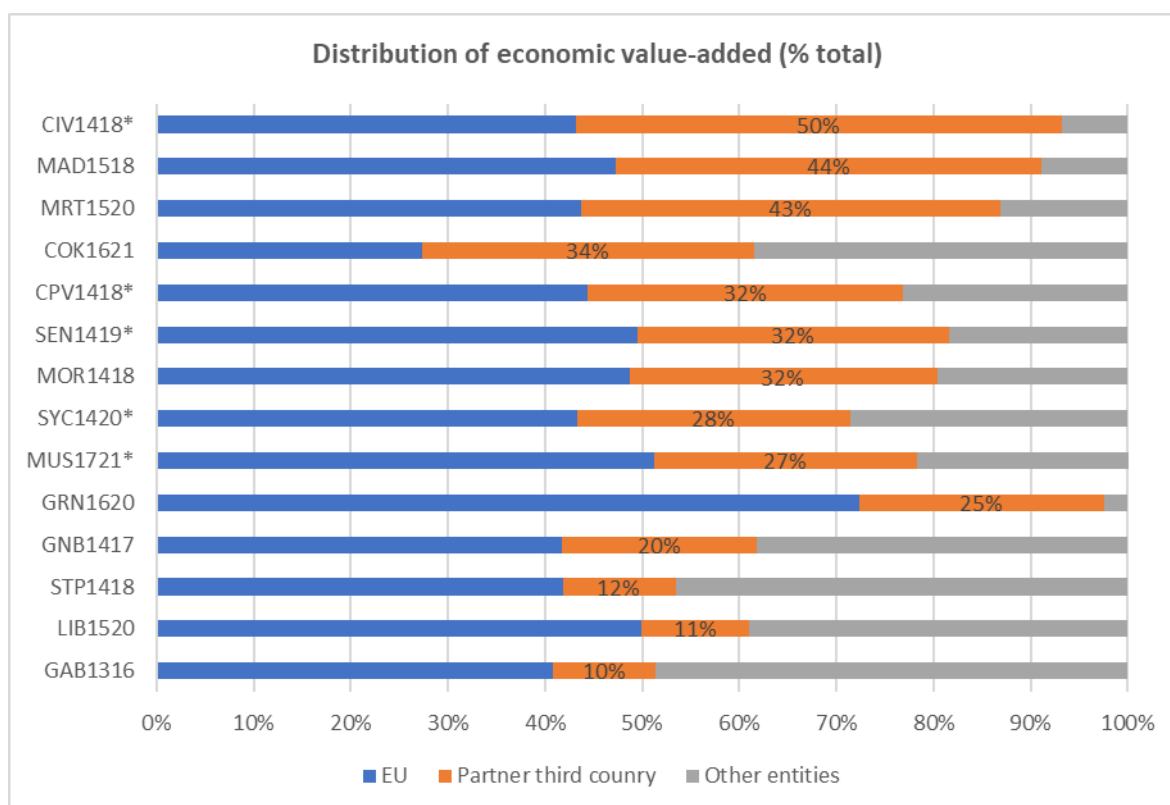
Figure 10: Cost-benefit ratio of the EU public investment in the contribution for access under SFPAs for which the implementing Protocols recently expired.

Source: *Economic analysis in the ex-post evaluations*

Note: *Cost-benefit ratio: ratio between the economic value added supported by the activities of EU vessels and the EU financial contribution for access*

For each partner third country, the period in brackets is the period for which the cost-benefit ratio was assessed in the ex-post evaluations

The following figure shows the results of the economic analysis carried out in the ex-post evaluations of each Protocols concerning the distribution of value-added between the different beneficiary entities. A limitation of the methodology used in these ex-post evaluations is that they concentrate on catch obtained in the waters of the third countries. The methodology does not capture the benefits derived by the partner third country from the activities of EU vessels in the waters of other coastal States, or in international waters. This limitation is crucially important in the case of Côte d'Ivoire, Mauritius, Senegal and Seychelles. Through the development of port infrastructure and industrial processing capacities, these four partner third countries attracted the activities of the EU fleet operating in the regions largely beyond the quantities caught in their national waters in the framework of SFPAs.



Source: *Economic analysis in the Ex-post evaluations*

Note: * denotes partner third countries likely to derive economic benefits from the activities of EU vessels in other third countries' waters or in international waters

The information available suggests:

- Three partner third countries (Côte d'Ivoire, Madagascar and Mauritania) derive a significant share (43% or more) of the total economic value-added generated by the activities of the EU fleet. The share of value added is attributable to landings in the national ports, employment of national seamen, and for Mauritania, relatively high access payments
- A group of five other partner third countries derive a relatively low share of the total economic value-added generated by the activities of the EU fleet (Gabon, Guinea Bissau, Greenland, São Tomé-et-Príncipe and Liberia) as a result of an absence of significant interactions between their fisheries sector and the EU fleet (no calls in national ports, no or little employment of national seamen)
- In between these two groups, are partner third countries capturing between 27% (Mauritius) and 32% (Cabo Verde) due to some interactions between the partner country and the EU fleet in the form of employment of nationals and/use of ports.

As outlined above, the economic benefits derived by Côte d'Ivoire, Mauritius, Senegal and Seychelles from the activities of EU vessels are probably significantly higher than the benefits derived solely from the activities in the national waters. For example, the Mauritius and Côte d'Ivoire processing industries handle annually close to 50 000 tonnes of tuna caught by the EU tuna fleet, while tuna catch in their respective waters by EU vessels are about 3 000 to 4 000 per year. Port Victoria in Seychelles is the main logistical base for tuna vessels operating in the Western Indian Ocean, resulting in additional economic benefits for the country. Similarly, Dakar in Senegal is the main logistical base for EU fishing vessels operating in neighbouring countries of West Africa such as Guinea Bissau and The Gambia.

3.6 Monitoring, control and surveillance

EU fishing vessels authorised to access the waters of partner third countries in the framework of SFPAs are subject to monitoring and control provisions set out by the SFPAs implementing Protocols, and the monitoring and control provisions implemented by the relevant Regional Fisheries Management Organisations (RFMOs) as appropriate. EU vessels are also subject to monitoring and reporting obligations to their flag Member States defined by the Control Regulation (EU) 1224/2009. Monitoring and control provisions implemented through all SFPAs include:

- Real time satellite tracking of vessels' positions while operating in the waters of partner third country (Vessel Monitoring System – VMS).
- Submission of logbooks to report on catch obtained in the in the waters of partner third country.
- Entry-exit notifications to inform the partner third countries of movements in and out the national waters.
- Presence of independent fisheries observers on a defined number / proportion of the EU fleet while operating in the waters of partner third country.

Concerning VMS, the provision is complied with by the EU vessels, but sometimes with some difficulties when partner third countries impose utilisation of a specific system that may not be the system used by the vessel (e.g. Mauritania). The main issue raised and discussed by the Joint Committees related to technical problems hindering reception of the position messages by the Fisheries Monitoring Centres of the partner third countries. When such technical problems are brought to the attention of the Joint Committees, they are followed-up by the Commission and the relevant Member States. When such technical problems are a result of structural deficiencies of the Fisheries Monitoring Centre of the partner third countries, the issues are addressed through dedicated activities implemented under the sectoral support component of the SFPAs (see section 4.3).

According to the review of the minutes of the Joint Committees, compliance by EU vessels with reporting obligations (entry-exit notifications, submission of logbooks) is an issue still relatively frequently brought to the attention of the EU party by authorities of the partner third countries. Main problems raised related to partial compliance with entry-exit notifications and potentially missing and/or illegible logbooks. The later problem is considered to be critical by partner third countries, due to its potential impact on the levels of access payments. When such problems occurred, DG MARE confirmed a systematic follow-up with the flag Member States to verify and implement corrective measures as appropriate, including through the formal procedures established by the Treaty in case of shortcomings. However, in some cases, investigations revealed that the drivers of the problems were inappropriate filings or non-reception of the information submitted by EU vessels to the partner third countries.

Transition towards an Electronic Reporting System (ERS) is an ambition considered by all SFPAs implementing Protocols adopted since the EU legislation imposed utilisation of the ERS on EU vessels of length equal or above 12 m as from 2012. ERS has many comparative advantages compared to submission of paper logbooks, such as the accuracy of data, the timeliness of submissions, and a significantly lower administrative burden. Implementation of the ERS would help to offset the problems described in the previous paragraph. Consistent with this ambition, the multi-annual programmes implemented under the sectoral support component of SFPAs included support for the acquisition of ERS by partner third countries and training of staff for their use (e.g. Cabo Verde, Côte d'Ivoire, Gabon, Greenland, Guinea Bissau, Madagascar, Mauritania, Mauritius, São Tomé-et-Príncipe and Seychelles). According to information received, implementation of ERS by most partner third countries is still work in progress. The minutes of the relevant Joint Committees show that the two parties constantly try to resolve technical issues which can be attributed to both the EU Member States and the partner third countries, depending on the situations.

All SFPAs implementing Protocols concluded include a requirement to board national observers on a defined number / proportion of the EU fleet while operating in national waters. According to various sources (ex-post evaluations, feedback from national authorities and EU operators), the provisions set out by the Protocols are not always complied with, as evidenced by the minutes of the relevant Joint Committees, and to the frustration of the partner third countries.

The main reason put forward by the relevant EU operators is the inadequate level of training of observers designated by partner third countries, considering that the scientific observers should have sufficient capacity to collect information required by the coastal States, information required by the EU Data Collection Regulation (EU) 2017/1004 and information required in the framework of RFMO observation programmes. For tuna vessels, an additional difficulty is to satisfy all requests underpinned by the transnational dimension of their fishing operations⁶⁶.

A recent EU study confirmed a need to enhance the scientific training of fisheries observers in the context of the multispecies SFPAs concluded with Atlantic waters of West Africa⁶⁷. Several initiatives were implemented to enhance the scientific coverage of EU fishing operations and the involvement of national scientific observers from partner third countries:

- Consideration of specific activities targeting observer coverage in the multi-annual programmes implementing the sectoral support component (e.g. Cook Islands, Mauritius, Senegal, Seychelles)
- Training of scientific personnel from partner third countries at the initiative of the EU operators, in partnership with relevant EU scientific institutes⁶⁸: several training sessions organised by the EU operators of purse seiners involved nationals from Comoros, Côte d'Ivoire, Gabon, Guinea, Madagascar, Mauritania, Mauritius, São Tomé-et-Príncipe, Senegal and Seychelles. EU operators of trawlers established a financing agreement with Guinea Bissau for the training of scientific observers. Based on feedback from EU operators, between 200 and 250 scientific observers from third countries have been trained at their initiative, and most of them subsequently included in the regional or national observation programmes.
- Development of Electronic Monitoring System entailing the sharing with the authorities of the partner third country (e.g. Cook Islands) of video records of fishing operations taken by a network of cameras installed in different locations of the vessel; and development of routines to share the results of scientific observations of activities in national waters with the coastal States, independently from the nationality of the observer.
- Preparation of standardised data collection manuals and organisation of one training session for observers of partner third countries in the framework of multispecies SFPAs (i.e. Morocco, Mauritania, Senegal, The Gambia and Guinea Bissau) under the project referenced in footnote 67.

Impacts of these EU initiatives over time will depend to a large extent on the capacities of the partner third countries to maintain a pool of adequately trained observers. A recent study⁶⁹ showed that partner third countries have difficulties to recruit and maintain scientific personnel. However, provisions related to observers included in Protocols

⁶⁶ During a same fishing trip in the Eastern Atlantic, an EU purse seiner may typically catch fish in the waters of eight different coastal States and in international waters.

⁶⁷ Garcia-Isarch & al. (2020) Study on improvement for the analysis and exploitation of observer reports in EU fisheries from NW African waters. EASME/EMFFF/2016/008 SC 12.

⁶⁸ IRD in France and AZTI in Spain

⁶⁹ COMHAFAT (2017) Étude pour la mise en place d'un programme régional d'observation embarquée dans la région COMHAFAT.

triggered actions by certain partner third countries (e.g. Mauritania) to reinforce their pool of observers to meet the coverage objectives set out by the Protocols and to increase coverage of other foreign and national vessels.

EU scientists and EU operators noted that the mandate of the observer programmes in the framework of SFPAs should be clarified. In some cases, the observer is understood as having a control mandate, i.e. rather an inspector, in some cases, a scientific mandate, and in other cases, a mix of both mandates.

Box 5: Specifications of the Protocols in relation to exchange of VMS and ERS data

A review of the ongoing Protocols shows that specifications in relation to exchange of VMS and ERS data are not fully consistent across the Protocols. The review is further elaborated in Annex 8.

- All Protocols, except one, specify that the flag EU Member State is responsible for the transmission of data for its flag vessels to the Fisheries Monitoring Centre of the partner third country. The only exception is Mauritania for which EU vessels are required to send their VMS data directly to the national FMC according to a prescribed system, in addition to sending data to their flag Member State.
- In terms of maximum frequency for transmission of VMS data, some Protocols specify one hour (Mauritania, Mauritius and Seychelles), some Protocols specify two hours (The Gambia, Morocco), some Protocols specify one hour for certain categories of vessels, two hours for other categories (Senegal, São Tomé-et-Príncipe). In the case of Cabo Verde, Côte d'Ivoire and Guinea Bissau, the maximum frequency is not defined by the Protocols.
- In terms of fallback measures in the event of an interruption of transmission of VMS data, most Protocols specify an alternative reporting (radio/internet) every four hours, except for Mauritius (every two hours). EU vessels are allowed to stay in the EEZ without a functional VMS for different grace periods, ranging from five days (Mauritania) to thirty days (Cabo Verde, São Tomé-et-Príncipe and Senegal). For Guinea Bissau, the duration of the grace period is not specified.
- For ERS format, most Protocols foresee transmission of data in UN/CEFACT format through FLUX, with a transition period during which data may be transmitted via the Data Exchange Highway in EU-ERS (v.3.1 format). However, in the case of Mauritania, use of EU-ERS (v.3.1 format) was the only format contemplated by the Protocol expired in 2021.
- Most Protocols consider transmission of instant messages for entry-exit the national EEZ (ERS codes COE/COX) or for notification of entry to ports (ERS code POE). However, the ongoing Protocols concluded with Côte d'Ivoire, The Gambia, Mauritania, Morocco do not make references to instant messages.
- In terms of fallback measures in the event of an interruption of transmission of ERS data, the common regime retained under most Protocols is a daily communication of data by radio/internet with ten days granted to repair in case of breakdown. However, the Protocols concluded with Côte d'Ivoire, Guinea Bissau and Morocco do not make provision for fallback measures.

Some of the specifications described above may be imposed by the partner third country, with an obligation for the EU party to seek full alignment. However, when this is not the case, the EU party may endeavour to ensure consistency between the Protocols including as far as possible, alignment of VMS and ERS specifications with those applicable to EU vessels fishing in EU waters. Enhanced harmonisation would ensure clarity on information that the partner third countries and the EU Member States are expected to exchange, and would simplify the work for EU Member States, particularly those having flag vessels authorised to access the waters of different partner countries (e.g. Spain and France), and the European Commission's oversight of compliance of relevant obligations by the EU Member States.

Source: own elaboration based on the review of the relevant Protocols

3.7 Key principles governing the implementation of the access component of SFPAs

Among other clauses adapted to the contexts, the CFP Regulation introduced provisions on key principles governing the implementation of SFPAs in the relevant instruments (i.e. the SFPAs and/or their implementing Protocols). These key principles underpinning the quality of the governance framework included:

- The human rights clause
- The exclusivity clause
- The non-discrimination clause
- The transparency clause

3.7.1 The human rights clause

The CFP Regulation provided in its Article 31.6 that SFPAs should include a clause concerning the respect for democratic principles and human rights, which constitutes an essential element of such agreements, and also an essential element governing the EU external relations in any domain (e.g. cooperation, trade).

All SFPAs or their implementing Protocols include a relevant clause specifying that both parties undertake to implement the SFPAs in accordance with Article 9 of the Cotonou Agreement for ACP countries, or Article 1 and 2 of the Association Agreement concluded with Morocco. SFPAs or their implementing Protocols consider breach of essential and fundamental elements on human rights following procedures set out in Article 8 and Article 96 of the Cotonou Agreement as the basis for triggering suspension of the implementation of the Protocols.

The introduction of the human right clause in SFPAs or in their implementing Protocols has corrected previous situations where EU cooperation was partially suspended as a result of consultations implemented under Article 96 of the Cotonou Agreement, but not the financial support to the partner country under the framework of the SFPAs (i.e. Mauritania in 2009, Madagascar in 2010). Since the entry into force of the CFP Regulation in 2014, there have been no occurrences of situations triggering application of the human rights clause enshrined in the SFPAs or their implementing Protocols.

3.7.2 The exclusivity clause

According to Articles 31.5 and 31.6 b) of the CFP Regulation, an exclusivity clause providing that EU fishing vessels may engage in fishing activities in partner third countries waters only if they are in possession of a fishing authorisation issued under the framework of the SFPAs was included in all relevant instruments, sometimes in the SFPAs, sometimes in its implementing Protocol. The exclusivity clause ensures that only the designated types of EU fishing vessels may fish in the partner third countries waters within the technical and quantitative limits set out by the Protocols. In the absence of an implementing Protocol (i.e. dormant SFPAs), the exclusivity clause prohibits issuance of fishing authorisations to EU fishing vessels for accessing the waters of the partner third countries.

Findings from the ex-post evaluations suggest that the exclusivity clause was generally complied with by EU Member States and their operators. The few cases of non-compliance reported included fishing authorisations obtained by EU tuna vessels to access the waters of Equatorial Guinea (dormant since 2001) and of The Gambia (dormant between 1996 and 2019) and a couple of occurrences of EU fishing vessels accessing the waters of partner third countries under a chartering arrangement that a ruling of the European Court of Justice⁷⁰ deemed incompatible with the exclusivity clause. In all cases, the relevant EU Member States were reminded their obligations by the European Commission.

⁷⁰ Court of Justice of the European Union, Sentence Ahlström & others, Case 565/13

Feedback from EU operators suggested that the exclusivity clause applying to dormant SFPAs may have adverse impacts on their operations. The main impacts are i) the prohibition to access important fishing areas and ii) an unlevel playing field with foreign competitors which are not subject to the same access restrictions. In some cases, the exclusivity clause can have also adverse impacts on partner third countries, such as preventing the EU vessels from unloading / transhipping in the ports of the partner third country where the national legislation prohibits access to national ports for fishing vessels not authorised to fish in the EEZ (e.g. Kiribati), or the Solomon Islands processing industry not having access to tunas caught by EU purse seiners because of the impossibility for the vessels to fish in the area before unloading.

The Court of Auditors recommended in 2015⁷¹ to consider how to address interruption of fishing activities imposed by the exclusivity clause while respecting the principles of the CFP, and to clarify and include in the Protocols appropriate provisions to ensure the continuity of fishing operations between two Protocols. Since then, the European Commission has endeavoured to renegotiate dormant SFPAs (The Gambia, Gabon, ex-ante evaluation for Equatorial Guinea, advanced discussions with Madagascar), but could not introduce provisions into the SFPAs or into the Protocols to ensure the continuity of fishing operations between two Protocols. However, the Council authorised application the SFPAs on a provisional basis to avoid interruption due to the duration of the SFPA adoption procedures by the EU⁷².

3.7.3 The non-discrimination clause

According to Article 31.6 a) of the CFP Regulation, a clause establishing that partner third countries should undertake not to give more favourable conditions than those granted to EU fishing fleets to other fleets operating in the national EEZ is included in all SFPAs or in all Protocols, depending on the situations.

The non-discrimination clause considers any condition imposed to the EU fleet for accessing the fishing zone. The scope of the non-discrimination clause was not defined in details in the framework of SFPAs, but it may include financial or technical conditions such as:

- Fees paid in exchange for access.
- Technical measures governing fishing activities (e.g. gear dimensions, fishing areas authorised, time-area closures, catch composition).
- Monitoring, surveillance and control provisions, including embarkment of national observers.
- Provisions mandating and governing interactions with the fishing sector in the partner third countries (e.g. employment of national crew, landings in national ports).

Understandably, the non-discrimination clause is pivotal in ensuring that foreign vessels authorised to access the EEZ of partner third countries are subject to the same rules as those imposed on EU vessels, thus promoting CFP standards internationally and contributing to the establishment of a level playing field for EU operators and foreign operators (recital 50 of the CFP Regulation).

It is difficult to assess the extent to which partner third countries granted more favourable conditions than those accorded to EU vessels to other foreign fleets, in particular those which have the same characteristics and target the same species. The main reason is that transparency of foreign access agreements is not yet a widespread practice worldwide, including in the partner third countries. This underlines the pivotal importance of the

⁷¹ European Court of Auditors: Special Report No 11/2015: Are the Fisheries Partnership Agreements well managed by the Commission?

⁷² According to the Treaty on the Functioning of the European Union (TFUE), international fisheries agreements are to be ratified by the Council after obtaining the consent of the European Parliament.

transparency clause in this respect. However, the different ex-post evaluations did identify the following situations:

- For industrial small pelagic fisheries, the ex-post evaluations published in 2018 (Morocco) and 2019 (Mauritania) identified a fair alignment of the technical conditions applicable to EU and other foreign pelagic freezer trawlers authorised to fish in the respective waters, with however some differences such as an obligation to land part of the catch imposed on EU vessels but not on Russian vessels in Morocco. However, the activities of the small pelagic foreign fleet chartered to exploit small pelagic species in the waters of Mauritania raised concerns over the extent to which the non-discrimination clause was implemented according to the EU operators involved.
- In Guinea Bissau, the ex-post evaluation (2016) identified that all foreign fleets, including the EU fleet, were subject to comparable technical obligations in terms of fishing zones, employment of national seamen and observers, but a more favourable treatment for EU vessels which were exempted from landings in national ports under the 2014-2017 Protocol.⁷³
- For tuna vessels, when information was shared by the National authorities, the ex-post evaluations identified comparable access conditions for fishing zones authorised, boarding of national seamen and boarding of national observers in some cases (e.g. Madagascar), but exemptions from certain obligations for EU vessels in other cases (i.e. São Tomé-et-Príncipe in relation of employment of national seamen, observer coverage of EU fleet limited to 15% in Liberia whereas the national rule is 100%). However, in some other cases (e.g. Cabo Verde, Côte d'Ivoire, Mauritius and Seychelles), the lack of transparency of technical conditions imposed on other foreign purse seiners and longliners prevented a comparison with conditions imposed to EU vessels. In the case of Madagascar, EU tuna vessels were subject to a catch limit for sharks that was not imposed on other foreign tuna vessels.

Concerning payments for access borne by operators benefiting from fishing opportunities, the comparisons of conditions imposed on the various fleets is generally difficult to establish for the following reasons:

- For non-tuna vessels (e.g. small pelagic species, demersal species), direct authorisations granted to other foreign fleets generally factor in a specific access contribution to compensate for the absence of access contribution by the flag State. For example, non-EU small pelagic freezer trawlers in Mauritania are subject to a similar fee per tonne caught (EUR 123 / tonne) but have to pay an additional access contribution of EUR 300 000 per vessel that EU trawlers operating under the framework of the SFPAs do not have to pay.
- For tuna vessels, most access payments paid by non-EU vessels are on a flat-rate basis independent from catch obtained, while access payments borne by EU vessels include a fixed part and a variable part proportional to the catch obtained. Ex-post evaluations identified that in almost all cases, the fixed part of access fees paid by EU vessels is lower than the flat-rate paid by other foreign vessels, but that the variable part based on catch obtained may substantially increase the cost of access beyond what foreign vessels pay. For example, an EU purse seiner paid in 2017 close to EUR 300 000 for access to the Seychelles waters while the flat-rate imposed to other foreign purse seiners was USD 120 000 (\approx EUR 104 350) per year. In Madagascar, one EU purse seiner paid an annual access fee close to EUR 150 000 while the flat-rate imposed to other foreign purse seiners was USD 12 000 (\approx EUR 10 435) per year.
- Some foreign access agreements provide for in-kind contribution that increase the actual costs of access borne by the operators. For example, non-EU tuna vessels

⁷³ The 2019-2024 Protocol foresees local landings

authorised to access the waters of Liberia have to cover the costs of attendance of national delegates at international meetings and to pay special additional contributions for the development of the sector and for training of national fishers.

Access fees reflect a compromise considering other economic and social benefits captured by the country from the presence of the vessels in national waters. There is some logic to a foreign fishing vessel that has no interactions with the national territory paying more for access to the waters than a fishing vessel interacting with the national territory. EU operators also noted that their enterprises are subject to strict requirements in terms of security and working conditions which have a cost for the enterprises.

Concerning monitoring and control conditions, it may be safely assumed that all industrial vessels authorised to access the waters, whether EU or non-EU, are subject to real-time satellite tracking through the national Vessel Monitoring System (VMS) implemented in almost all partner third countries, and presumably to the obligation to submit catch declarations. However, there is generally no information available to assess the extent to which these monitoring and control provisions are complied with, in particular by foreign vessels flying the flag of third countries not necessarily fulfilling their international obligations as flag States.

A review of the minutes of the different Joint Committees held over the past few years shows that the evaluation of the compliance with the non-discrimination clause by the partner third country is not a frequent item on the agenda. There are no examples of Joint Committees reviewing and/or discussing the application of the non-discrimination clause by the partner third countries. EU operators and NGOs in the EU and in the third countries underlined the importance of the clause, and raised doubts about the application of the non-discrimination clause.

3.7.4 The transparency clause

A transparency clause has been present in almost all SFPAs or in their implementing Protocols since 2015⁷⁴. The transparency clause is pivotal to ensure: i) provision of relevant information to inform scientific analysis, in particular those needed to assess the surplus; and ii) provision of relevant information to assess the extent to which the different fleets are subject to similar access conditions. The SFPA concluded with Senegal is the only exception, with no explicit transparency clause in the SFPA or in the implementing Protocols started in 2014 and renewed in 2019.

The review of the SFPAs and of their implementing Protocols indicates two types of transparency clauses:

- A transparency clause mandating the partner third country **to make public** any agreement authorising foreign fleets to fish in national waters (e.g. Cabo Verde, Cook Islands, The Gambia, Guinea Bissau, Liberia, Mauritania, São Tomé and Príncipe, Seychelles)
- A transparency clause mandating the partner third country **to provide the EU**, through the Joint Committee, with relevant information on foreign access agreements (e.g. Cote d'Ivoire, Greenland, Mauritius, Morocco).

According to the findings from the ex-post evaluations confirmed by feedback from the Fisheries attachés and NGOs in the EU and in the third countries, partner third countries publishing the foreign agreements concluded remain an exception, with few partner third countries publishing the relevant information (e.g. Cook Islands, Greenland, Morocco). For most other partner third countries, details of foreign access agreements are not published.

⁷⁴ Before 2015, some SFPAs / Protocols did not include a transparency clause (e.g. Comoros, Côte d'Ivoire 2013, Kiribati 2012, Gabon 2013, Madagascar 2015)

However, it should be noted that Mauritania and Seychelles recently (2021) took steps to publish information available on the different access agreements concluded as part of their initiatives to become compliant with the relevant transparency requirement set out by the Fisheries Transparency Initiative (FiTI)⁷⁵ addressing publication of foreign fishing access agreement. However, for Mauritania, the transparency clause was expected to be complied with much earlier as a result of the transparency clause introduced in the 2015 Protocol.

Minutes of the Joint Committees show that relevant information is provided by the partner third countries when asked by the EU party. However, the minutes of the Joint Committee do not necessarily comment on the extent to which information provided is complete and best available, and how the information was provided (i.e. orally or in writing). However, minutes of some Joint Committees suggest that the quality of the information provided was below expectation (e.g. Mauritania, dec. 2019).

This does not necessarily mean that there is no scientific information on the activities of other foreign vessels in the waters of the partner countries. A review of the reports of the different Joint Scientific Committees organised in the framework of the multispecies SFPAs concluded with Morocco, Mauritania, Guinea Bissau and Senegal suggests that catch and effort data on other foreign fleets are available at various granularity levels, and considered in the scientific analysis as appropriate (see section 3.4).

3.7.5 Provisions of Protocols in relation to compliance with key principles

Until now, only violation of the human rights clause may affect the implementation of the SFPAs (e.g. suspension). SFPAs and/or their implementing Protocols do not include specific provisions affecting the implementation of the SFPAs in case of non or partial compliance with the exclusivity clause, the transparency clause and the non-discrimination clause. SFPAs generally include the possibility of suspension in the event of dispute between the parties over the interpretation of the SFPAs or its implementation which could be relevant in these cases. However, no protocols have been suspended for these reasons, nor for any other reasons except violation of human rights, to the best of our knowledge

⁷⁵ See <http://www.fiti-mauritanie.mr/> for Mauritania and <http://www.sfa.sc/> for Seychelles. For Mauritania, information published in 2021 refers to access agreements in force in 2018. For Seychelles, three out of the five access agreement could not be published for confidentiality reasons (two of the three) or because there is no written agreement (one of the three).

4 The sectoral support component of SFPAs

4.1 Background

Article 32.1 b) of the CFP Regulation (EU) 1380/2013 establishes that the EU shall provide financial assistance to partner third countries *"in order to establish the governance framework, including the development and maintenance of the necessary scientific and research institutions, promote consultation processes with interest groups, and monitoring, control and surveillance capacity and other capacity building items relating to the development of a sustainable fisheries policy driven by the third country. Such financial assistance shall be conditional upon the achievements of specific results and complementary to and consistent with the development projects and programmes implemented in the third countries in question"*.

This article reflects the 2012 Council's conclusions on SFPAs, which emphasised the priority of supporting monitoring and research capacities and improving the business climate in the partner third countries, adding consideration of benefits for the local populations (paragraph 5).

Article 32.2 of the CFP Regulation (EU) 1380/2013 foresees that financial assistance shall be decoupled from payments for access, and that the EU *"shall require the achievements of specific results as a condition for payments under the financial assistance and shall closely monitor progress"*.

From the EU budget perspective, the financial assistance for sectoral support within the framework of SFPAs is considered as a budget support framed by Article 186 of the Financial Regulation (EU, Euratom) 966/2012⁷⁶ until August 2018 and Article 236 of the Financial Regulation (EU, Euratom) 2018/1046⁷⁷ after that date (source: DG MARE). According to Article 186 of the Financial Regulation 2018/1046, financial assistance in the form of budget support may be provided to third countries when the following three conditions are met:

- a) The third country's management of public finances is sufficiently transparent, reliable and effective
- b) The third country has put in place sufficiently credible and relevant sectoral or national policies
- c) The third country has put in place stability-oriented macroeconomic policies

Article 236 of the Financial Regulation 2018/1046 added one additional condition:

- d) The third country has put in place sufficient and timely access to comprehensive and sound budgetary information

Under the previous Financial Regulation 966/2012 which applies to SFPAs concluded before 2018 (i.e. all current SFPAs except Morocco and Seychelles⁷⁸), financial assistance in the

⁷⁶ Regulation (EU, Euratom) No 966/2012 of the European Parliament and of the Council of 25 October 2012 on the financial rules applicable to the general budget of the Union and repealing Council Regulation (EC, Euratom) No 1605/2002. OJ L 298, 26.10.2012, p. 1–96

⁷⁷ Regulation (EU, Euratom) 2018/1046 of the European Parliament and of the Council of 18 July 2018 on the financial rules applicable to the general budget of the Union, amending Regulations (EU) No 1296/2013, (EU) No 1301/2013, (EU) No 1303/2013, (EU) No 1304/2013, (EU) No 1309/2013, (EU) No 1316/2013, (EU) No 223/2014, (EU) No 283/2014, and Decision No 541/2014/EU and repealing Regulation (EU, Euratom) No 966/2012 PE/13/2018/REV/1. OJ L 193, 30.7.2018, p. 1–222

⁷⁸ According to DG MARE, the applicable Financial Regulation is determined considering the date of entry into force of the head agreement (the SFPAs) and not the date of entry into force of their implementing Protocols.

form of budget support was conditioned by condition a) b) and c). Condition d) apply to SFPAs concluded as from August 2018 (i.e. Morocco and Seychelles so far).

According to both Financial Regulations, payments must be based on the fulfilment of the conditions referred to above, and some payments may be also conditional on the achievement of milestones over time measured by objective performance indicators.

4.2 Implementation modalities

4.2.1 Governing instruments

The SFPAs introduce the principle of an EU financial contribution for reinforcing the capacity of the partner third country to develop a sustainable fisheries policy and the sustainable exploitation of fisheries resources in national waters. The SFPAs make explicit the decoupling of the financial contribution for access and the financial contribution for sectoral support (e.g. payments for sectoral support shall be independent from the payments regarding access). In addition, SFPAs enshrine the principle of performance-based payments for sectoral support.

Until end of 2020, the sectoral support component of SFPAs was generally introduced in the Protocols implementing the SFPAs through two articles, one "Financial contribution" specifying the amount of the financial contribution for sectoral support and specification of payments of the contribution on a public treasury account, and a second one "Sectoral support" making provisions for implementation modalities in relation to the programming process, the reporting obligations as appropriate, the criteria for disbursements, and the time-limit for utilisation of the envelope. Implementation modalities provisioned for in the Protocols may be further detailed depending on the contexts (ex. Article 3 of the 2015-2021 Protocol implementing the SFPAs with Mauritania).

For certain Protocols, the implementation modalities of sectoral support were detailed in guidelines discussed between the parties during the first meeting of the Joint Committee to be organised no later than three months after the date of provisional application of the Protocol. The guidelines are non-binding instruments annexed to the minutes of the Joint Committees highlighting the objectives, the eligibility requirements, traceability, programming, reporting, payment principles and visibility requirements. Based on our review of the minutes of the relevant Joint Committees, sectoral support implementing guidelines were approved in the framework of the SFPAs concluded with Cook Islands, Côte d'Ivoire, The Gambia, Greenland, Liberia, Mauritius, Morocco and Seychelles. There is no evidence of implementation guidelines approved by the two parties and annexed to the minutes of the relevant Joint Committees in the framework of the ongoing Protocols implementing the SFPAs concluded with Cabo Verde, Guinea Bissau, São Tomé-et-Príncipe and Senegal. However, it can be noted that the adoption of implementing guidelines has been progressively extended to most Protocols, as the vast majority of the Protocols negotiated before 2014 did not include such guiding elements annexed to the minutes of the Joint Committees. In the single case of Mauritania, implementing modalities are detailed in an annex to the Protocol, which gives them a binding force for the two parties.

4.2.2 The programming process

Most Protocols foresee that the multiannual programme should take into account the priorities expressed by the partner third country in its national fisheries policy, and maritime policy as appropriate. For the most recent Protocols concluded with Cabo Verde, Cook Islands, Côte d'Ivoire, Guinea Bissau, Madagascar, Mauritania, São Tomé-et-Príncipe and Seychelles, the priorities are specified in the relevant Protocols with monitoring control and surveillance, scientific research and support to small scale fisheries as common denominators and other elements depending on the contexts such as *inter alia* aquaculture,

health certification, environment protection or infrastructures being included in the priorities. The identification of the priorities in the Protocols supported concentration of activities in areas of interest for the two parties, comprising for the EU party the priorities listed in Article 31.1 and 32.1 of the CFP Regulation (EU) 1380/2013. The selection of priorities in the Protocols also facilitated the programming process.

According to feedback from the fisheries attachés confirmed by feedback from the authorities of some partner third countries, the partner third countries lead the programming process and submit a proposal to the Joint Committee. The EU party may propose amendments to the proposals, but may decide to postpone the adoption of the proposed the multi-annual programme submitted if unsatisfactory (ex. Senegal 2019).

The alignment of the multi-annual programme with the national sectoral policy is generally discussed between the parties during the first meeting of the Joint Committee. Review of the minutes of the different Joint Committees confirmed that the proposed multi-annual and annual programming were identified as being aligned with the relevant national or EU policies. Contributions of the authorities of certain partner third countries to this evaluation confirmed the alignment of the sectoral support activities with the national sectoral policies.

Authorities of the partner third countries having replied to the targeted consultation during the evaluation indicated that the preparation of the sectoral support programme did not entail specific consultation programmes with national stakeholders (Côte d'Ivoire, Greenland, Liberia and Seychelles). However, Liberia, Morocco and Seychelles indicated that the sectoral support programmes are implementing the national sectoral strategies which considered contributions obtained from significant consultation programmes of national stakeholders. Stakeholders in almost all partner third countries (economic operators, civil society) confirmed they were not consulted by their respective authorities during the preparation of the sectoral support programmes.

4.2.3 The multi-annual programmes

Initial programmes

The sectoral support implementation guidelines, where available, expect the multi-annual programme to identify: i) the global objectives to be achieved and the activities to be performed; ii) the funds allocated to each of the said activities; iii) an indicative implementation timetable; iv) annual performance targets to be achieved; and v) performance indicators and sources of verification per activity. The requirements of the sectoral support implementation guidelines supported an adequate framework for monitoring and evaluation of the performances of the partner third country over time.

For some partner third countries, review of the documentation available suggests that the multi-annual programmes approved by the Joint Committees broadly meet the expectations set out in the implementing guidelines (e.g. Cabo Verde, Cook Islands, Greenland, Mauritius and Morocco).

However, review of the documentation available suggests that the multi-annual programmes adopted by the two parties may not be fully appropriate for an effective monitoring and evaluation of the contribution of the sectoral support to the national sectoral policies:

- For certain partner third countries, the multi-annual programme is a list of activities to be implemented over time, but without identification of indicators of the expected outcomes of the activities to support the global objectives (e.g. Côte d'Ivoire, Liberia, Madagascar, Mauritania, São Tomé-et-Príncipe, Seychelles).
- Certain indicators selected in the multi-annual programme are not fully appropriate to assess progress towards targets obtained over time through the activities. In a

number of cases, the annual indicators selected are input indicators such as the number of days of deployment of patrol vessels or the number of research surveys implemented, while for example number of fishing vessels sighted / inspected or submission of a scientific cruise report would have been more appropriate to assess progress achieved. Also, some multi-annual programmes consider qualitative indicators that are not objectively verifiable, such as "insufficient knowledge" as baseline situation and "improved knowledge" as an objective for certain activities (The Gambia, Mauritius).

- In some cases, the sources of verification selected in the multi-annual programme in relation to activities or indicators are overly complex. For example, the source of verification reported in the multi-annual programme for the purchase of a patrol boat (Mauritania) is "supplier contract, invoices, interbank payment orders, acceptance report, effective start-up and opening ceremony"; and the source of verification selected for research campaigns (Guinea Bissau) is "planning of campaigns, chartering contract, technical dossier, proofs of payments of technicians and availability of survey reports".
- Proportionality between the scope of activities selected in the multi-annual programmes and the budget available could be expected to ensure concentration of the resources available on selected key activities, particularly when annual budgets are comparatively limited. Based on our review, proportionality was generally the case, such as for Madagascar 2015-2018 (about 12 activities for an annual budget of EUR 700 000) or São Tomé-et-Príncipe 2014-2018 (four activities for an annual budget of EUR 325 000). However, in certain cases, the number of activities selected in the multiannual programme was high compared to the budget available, with for example 23 activities selected for an annual budget of EUR 275 000 in one case (The Gambia 2019-2025), and 31 activities selected for an annual budget of EUR 350 000 in another case (Cabo Verde 2019-2024).

Adaptation of sectoral support programmes over time

The multi-annual programmes may be adapted over time to reflect changing needs or changing priorities. All SFPAs implementing Protocols reviewed introduced a specific provision in this respect by establishing that any amendment to the annual or multi-annual programmes shall be approved by the Joint Committee. The sectoral support implementing guidelines further specified that proposals to amend the multi-annual programmes shall be submitted in writing by the partner third country in advance of the Joint Committee for approval by the parties during the meeting of the Joint Committee. Implementation guidelines approved in the context of some SFPAs foresee possibility to agree on amendments by exchange of letters in cases of emergency or urgency, with amendments agreed to be formally noted at the next meeting of the Joint Committee.

One partner third country (Seychelles) welcomed the opportunity to adapt activities implemented under the multi-annual programmes, but noted that the mechanisms lack flexibility. Feedback from Fisheries Attachés suggest that the provisions governing amendments to the multi-annual programmes are not always complied with by certain partner third countries, with amendments unilaterally implemented and presented *a posteriori* to the Joint Committee for approval. In its 2015 report, the European Court of Auditors identified situations where sectoral support funds were not fully used as intended by the partner third countries.

4.2.4 Reporting on the implementation of the sectoral support

In most cases, the relevant articles on sectoral support in recently expired or ongoing Protocols mandated the partner third countries to submit an annual implementation report to the Joint Committee to support the evaluation of the results achieved. In addition, the Protocols made provisions for a final report on the implementation of the sectoral support

throughout the duration of the Protocol before its expiry. However, the Protocols with Côte d'Ivoire (2018-2024) or Greenland (2016-2020) did not specify reporting obligations.

Reporting obligations are now a feature of almost all Protocols, with the exceptions noted above. This is an improvement compared to the situation in the early 2010s when most Protocols did not include such an obligation. For example, the Protocols concluded in 2014 with Cabo Verde and São Tomé-et-Príncipe did not include the reporting obligations that are now included in the Protocols concluded with these two partner third countries in 2019.

When available, the non-binding guidelines on the implementation of the sectoral further detail the expectations in terms of reporting, such as the time-limit for submission (e.g. 30 day prior to the meeting of the Joint Committee) and the content of the reports (e.g. technical and financial reports describing actions implemented, the results obtained, problems encountered and corrective measures as appropriate).

A review of the reports available cross-checked with the feedback from the Fisheries Attachés suggests that overall, partner third countries provided reports on the implementation of the sectoral support programme. However, for certain partner third countries, written reports were submitted for some tranches but not for all, and there are examples of partner third countries that did not submit written reports, or reports that were limited to the situation with regards to the use of funds (Guinea-Bissau, Cabo Verde, Mauritius, São Tomé-et-Príncipe). Minutes of the different Joint Committees show that where appropriate, the EU party consistently recalled the reporting obligations to the partner third countries, resulting in improved compliance with the reporting provisions over time.

The quality of the reports submitted by partner third countries is variable. Review of the reports available cross-checked with the feedback from the Fisheries Attachés confirmed that some reports were of high technical quality and appropriate for assessing the results achieved with the sectoral support funding available (e.g. Cook Islands, Greenland, Kiribati, Morocco, Seychelles). However, in other cases, the reports were not fully appropriate to assess the results obtained and the contribution of the sectoral support activities to the implementation of the national sectoral policies. As an example of good practice, the initiative of Seychelles to commission and publish⁷⁹ external evaluations of the performances of the sectoral support is highlighted.

4.2.5 Sectoral support payments

Criteria for payment of annual tranches to the partner third countries

The relevant articles of the Protocols implementing the SFPAs foresee payment of the EU contribution for sectoral support as follows:

- For the first year of application of the Protocol, the instalment is paid on the basis of the needs identified as part of the programming agreed during the meeting of the first Joint Committee.
- For the subsequent years of application, the instalments are paid on the basis of an analysis of the results achieved by the Joint Committee. As a horizontal principle included in all Protocols, if the analysis by the Joint Committee concludes that results obtained are inconsistent with the programming or if the financial execution is found to be insufficient, the payments may be revised or suspended, in part or in full⁸⁰.

⁷⁹ <http://www.sfa.sc/index.php/doc/publications/eu-sey-performance-audit/category/22-eu-sey-performance-audit> (consulted 3/6/2021)

⁸⁰ The SFPA (head agreements) also consider a reassessment of the terms of the financial contribution for sectoral support, where this is warranted by the results of the annual and multiannual programming observed by both Parties

The implementing rules of these provisions are detailed in the guidelines agreed between the two parties when available, or in the case of Mauritania 2015-2021 in the relevant annex to the Protocol.

A review of the guidelines annexed to the minutes of the relevant Joint Committees shows different approaches for the assessment of the financial execution of the annual tranches of the sectoral support. The table below summarises the criteria for disbursement established.

Table 22: Financial criteria for disbursement of instalments of sectoral support established by the implementing sectoral support guidelines

Protocols	Value of annual tranche (EUR)	Criteria set out in the guidelines
Cook Islands 2016-2021	350 000	Full payment of next tranche if at least 75% financial execution of current tranche including carry-over as appropriate
Côte d'Ivoire 2018-2024	352 000	Full payment of next tranche if at least 75% financial execution of current tranche including carry-over as appropriate
The Gambia 2019-2025	275 000	Full payment of next tranche if at least 75% financial execution of current tranche including carry-over as appropriate
Greenland 2016-2020	2 931 000	Actual execution** if below 80%, full payment otherwise
Mauritania 2015-2021*	4 125 000	Pro-rata actual execution
Mauritius 2017-2021	355 000	Full payment of next tranche if at least 70% financial execution of current tranche including carry-over as appropriate
Morocco 2014-2018	14 000 000	Pro-rata actual execution
Morocco 2019-2023	17 900 000	Pro-rata actual execution
Seychelles 2014-2020	2 600 000	Actual execution if below 75%, full payment otherwise

Source: Own review of the guidelines annexed to the minutes of the relevant Joint Committees

Note: * For Mauritania, implementation rules are in annex II to the Protocol

** For Greenland, the 80% referred to in the guidelines concern the technical and financial execution

- For Protocols considering a comparatively small amount of funding of the sectoral support (Cook Islands, Côte d'Ivoire, The Gambia and Mauritius) the rule agreed is based on a threshold: if the financial execution of the tranche is above the agreed percentage (70%-80% depending on the case), the payment for the following years' tranche is paid in full, with the difference between the actual financial execution and the amount paid carried over under the next programming periods. If the financial execution is less than the threshold, payment of the tranche is suspended.
- For Protocols considering a comparatively high amount of funding of sectoral support (Greenland, Mauritania, Morocco and Seychelles), the rules for disbursement consider payment of the justified actual level of financial execution, with carry-over of the unpaid fraction for utilisation under the next programming periods. In the case of Greenland and Seychelles, sectoral support instalments are paid in full if the execution is greater than 80% and 75% respectively, with the difference between the actual financial execution and the amount paid to support the next tranche carried over under the next annual periods.
- For all Protocols, the qualification of the financial execution is not specified: commitments or payments, the latter being often lower than the former.

For the Protocols for which guidelines were not annexed to the minutes of the relevant Joint Committee (e.g. Cabo Verde, São Tomé-et-Príncipe, Senegal), review of the minutes

of the different Joint Committees suggests that the EU party agreed to release 100% of the value of the tranche for the following programming period where the partner third country demonstrated a financial execution of at least 75% of the amount allocated to the programming period, with the difference between the actual financial execution and the amount paid carried over under the next programming periods, and to suspend payment when the financial execution of the current tranche is less than 75%.

Concerning the technical execution of the annual programmes, the implementing guidelines did not specify rules underpinning the decision to disburse the tranches. According to the Protocols and/or the guidelines, payments are conditioned by an overall positive assessment by the Joint Committee of clear progress towards the achievements of the annual targets defined for the programming period. The review of the minutes of the different Joint Committees did not provide details on the rationale underpinning the assessment of technical progress by the Joint Committees when the decision to pay the instalment is considered.

Conditions for decommitments of the EU contribution for sectoral support

During the implementation of the Protocols

Conditions for decommitments of a part of the EU contribution for sectoral support are detailed in the implementing guidelines approved by the Joint Committee when available. Our review suggests a possibility to deduct non-utilised amounts of tranches for Cook Islands 2016-2021 and Côte d'Ivoire 2018-2024. In these cases, the partner third countries were given six months to utilise the full cumulative amounts of tranches paid⁸¹, with a possibility for the EU to deduct the unused amount if this is not the case. For all other Protocols, there are no specifications of conditions for decommitments during the implementation of the Protocols in the guidelines (The Gambia, Greenland, Liberia, Morocco and Seychelles).

After the expiry of the Protocols

Concerning the opportunities to utilise a possible unused part of the sectoral support funding after the end of the Protocols, the approach taken is different between the partner third countries. For some Protocols, the funding available may be used after the Protocol until the envelope has been used up (Comoros, Côte d'Ivoire 2013-2018, Greenland 2016-2020), Guinea Bissau 2014-2017, Mauritania), for other Protocols, the Protocols foresee that sectoral support may not be paid beyond a period of six month after the expiry of the Protocol (Cook Islands 2016-2021, Côte d'Ivoire 2018-2024, Gambia, Guinea Bissau 2019-2024, Liberia, Madagascar, Mauritius 2017-2021 and Senegal 2019-2024). Finally, the Protocols with Cabo Verde 2019-2024, Morocco 2019-2024, São Tomé-et-Príncipe 2019-2024, Senegal 2014-2019 and Seychelles 2020-2026 foresee that sectoral support cannot be paid beyond a period of 6 months after the expiry of the Protocol. For other Protocols (e.g. Morocco 2014-2018 Mauritius 2014-2017 or Seychelles 2014-2020), the relevant Protocols did not include considerations on the time-limit to utilise the sectoral support funding after the expiry of the Protocol.

Payments to partner third countries

⁸¹ If partner third countries justify at least 75% utilisation of cumulative amount available, 100% of the tranche is paid. The possible deduction after six months concerns the difference between the 100% and the % justified in excess of 75%.

The table below shows the status of payments of the contribution for sectoral support for recently expired Protocols (situation at the end of 2020) based on DG MARE budget information and review of the minutes of the Joint Committees.

Table 23: Status of payment of EU financial contribution for sectoral support at the end of the Protocols for recently expired Protocols

Protocols	Value of annual tranche	Payment status	Carry over*
Cabo Verde 2014-2018	275 000	All paid , with two last tranches paid a few months before the end of the Protocol	Yes
Côte d'Ivoire 2013-2018	257 500	All paid , last tranche paid after the end of the Protocol	Yes
Gabon 2013-2016	450 000	All paid , with last tranche paid a few months before the end of the Protocol	Yes
Greenland 2016-2020	2 931 000	All paid on schedule	?
Guinea Bissau 2014-2017	3 000 000	Not all paid , remaining amount carried over	Yes
Kiribati 2012-2015	350 000	All paid on schedule	No
Madagascar 2015-2018	700 000	All paid on schedule	Yes
Mauritius 2014-2017	302 500	All paid , with two last tranches paid after the end of the Protocol	Yes
Morocco 2014-2018	14 000 000	Last tranche partially paid, remaining amount carried over	Yes
São Tomé 2014-2018	325 000	All paid on schedule	Yes
Senegal 2014-2019	750 000	Not all paid , late on schedule	Yes
Seychelles 2014-2020	2 600 000	All paid on schedule	Yes

Source: DG MARE budget data and review of the minutes of the Joint Committees

Note: * carry-over is a fraction of the sectoral support funding paid to the partner third countries expected to be utilised after the expiry of the Protocols
?: information not available

- For a majority of recently expired Protocols, the financial contribution for sectoral support was entirely paid to the relevant partner third countries (Cabo Verde, Côte d'Ivoire, Gabon, Greenland, Kiribati, Madagascar, Mauritius, São Tomé-et-Príncipe Senegal, and Seychelles). However, for some of these partner third countries (see previous table), a certain amount paid by the EU was expected to be utilised after the expiry of the Protocols as a result of payment rules: as described above, the EU may pay 100% of the tranches if at least 75% of the budget (or other % agreed) was utilised, meaning that the partner third country still have to demonstrate utilisation of the unused fraction of the tranches after the payment by the EU. The same apply for tranches paid towards the end of the multiannual period of the Protocols
- In some cases, the partner third country was not able to demonstrate full utilisation of the budget available, and/or did not provide the expected justification for the use of funds, triggering a decision for partial payment by the Joint Committee. The tranches were not paid in full, and the remaining amount was carried over under the periods covered by the next Protocol (Guinea Bissau 2014-2017 and Mauritania 2006-2012 both for substantial amounts, Senegal and Morocco)

In the case of Guinea Bissau and Mauritania, carry-over of unpaid proportions of the EU financial contribution for sectoral support identified under previous Protocols underpinned an adaptation of the amount paid for the first tranche for the ongoing respective Protocols. In the case of Mauritania, the ongoing 2015-2021 Protocol established that sectoral support funding could be only released once all unused financial support from previous Protocols period was paid, which eventually happened in 2017. For Guinea Bissau, the amount paid for the first tranche was reduced to factor in carry-over from the previous Protocol in the absorption capacity.

DG MARE confirmed that until now there have been no occurrences of EU contributions for sectoral support being decommitted (i.e. forfeited) for insufficient performances by the partner third countries in the implementation of the multi-annual programmes, or for any other reasons. There are several instances of payments being suspended or adapted, but with opportunities still available to the partner third countries to obtain the full amount of the EU contribution for sectoral support foreseen by the Protocols providing full implementation of the multi-annual programmes, or implementation of remedy actions as appropriate⁸².

4.2.6 Organisation and resources allocated by the EU for implementation of the EU contribution for sectoral support in the framework of SFPAs

The overall responsibility for negotiation, implementation and monitoring of SFPAs, including the sectoral support component is allocated to DG MARE with the current Unit B3 (Trade negotiations and SFPAs) under Directorate B (International Oceanic Governance and Sustainable Fisheries) leading the process on behalf of the European Commission.

The B3 team based in Brussels is seconded by Fisheries Attachés based in different EU Delegations in the third countries⁸³. Fisheries Attachés support the B3 team in Brussels for the preparation of the multi-annual and annual sectoral support programmes and for the regular monitoring, including verifications, of the implementation of the different activities by the partner third countries between the meetings of the Joint Committees. In early 2021, there was six Fisheries Attachés with specific portfolios of SFPAs as follows:

Table 24: List of Fisheries Attachés and respective portfolios (situation in June 2021)

Duty station	Active SFPAs	Dormant or prospective SFPAs
EUD Morocco	Morocco, São Tomé, Gabon*	*
EUD Mauritania	Mauritania, Liberia	
EUD Senegal	Cabo Verde, Gambia, Guinea Bissau, Senegal	
EUD Kenya	Côte d'Ivoire	Kenya, Mozambique
EUD Mauritius	Mauritius, Seychelles	Madagascar, (Comoros**)
EUD Fiji	Cook Islands	Kiribati, Micronesia, Solomon Islands

Source: DG MARE

Note: * The SFPA with Gabon entered into provisional application on 29 June 2021

** Until denunciation by the EU of the SFPA concluded with Comoros in 2018

Feedback from certain EU Delegations indicated that EUD personnel may be also assigned to the regular monitoring of implementation of the sectoral support component of SFPAs in partnership with Fisheries Attachés. This concerns mostly the EUDs in Guinea Bissau, Liberia and São Tomé-et-Príncipe, where Fisheries Attachés are not present on a permanent basis. The relevant EUD noted that the designation of one of their staff for monitoring the implementation of the sectoral support component of SFPAs was on their own initiative. The Protocols implementing the SFPAs do not specify a role and a responsibility for the EUDs in relation to the sectoral support component⁸⁴.

Feedback from the Fisheries Attachés confirmed frequent interactions with the relevant authorities in the partner third countries to monitor the state of play of the implementation

⁸² For example, a decision was made to reduce the EU contribution for sectoral support to Guinea Bissau due to inappropriate use of EUR 915 000 plus EUR 164 000 for which justifications were not provided

⁸³ Except for the SFPA with Greenland directly managed by the B3 team based in Brussels.

⁸⁴ The Protocols specify a role for the EUDs in relation to the access component of SFPAs (depending on Protocols: *inter alia* issuing of fishing authorisations, reception of logbooks and observer reports, follow-up of infringements)

of the sectoral support component of the SFPAs, in addition to a similar level of interactions to monitor the state of play of the access component (e.g. fishing authorisation, follow-up of reporting obligations and other obligations mandated by the Protocols, follow-up of infringements). The intensity of interactions with relevant authorities in the third countries increases as the date of the meetings of the Joint Committees draws near to ensure submission of reports and of required evidence in due time.

The Protocols and the implementing sectoral support guidelines are not specific about the requirements for verifying the financial reporting on the level of utilisation of funding available by the partner third countries. According to feedback received, proof of expenses reported by the partner third countries are verified by the EU party in the context of certain SFPAs, but not for all SFPAs. As example of good practice, the multi-annual programmes identified resources to fund external audits of disbursements under one or several tranches (e.g. Comoros, Madagascar and Seychelles) and the results were shared with the EU party.

4.2.7 Visibility / communication

Public awareness about the sectoral support

The following table shows the published status of the main written documents produced in relation to the preparation, implementation and results of the utilisation of the EU contribution for sectoral support in the framework of SFPAs.

Table 25: Status of publication of written documents in relation to the utilisation of the EU contribution for sectoral support

Constituting item	Written source	Published ?
Financial envelopes and implementation principles	Protocols	Yes
Transfer of EU contribution to national budget	Finance Laws / Acts	Yes
Multi-annual programmes	Minutes JC	No
Annual programmes	Minutes JC	No
Implementation guidelines	Minutes JC*	No*
Implementation reports by third countries	Minutes JC	No
Rationale for payments of tranches	Minutes JC	No
Ex-post evaluations	Standalone reports	Yes

Source: based on documents provided by DG MARE

Note: * The 2015-2021 Protocol implementing the SFPA with Mauritania is an exception with implementing guidelines annexed to the Protocol

In summary, published information on the sectoral support is limited to: i) the information on the amount of the EU financial contribution and its implementation principles (e.g. priorities, principles governing programming and payments) subject to specific provisions in the Protocols; ii) registration of EU contribution in the Finance regulations of the partner third countries⁸⁵; and iii) findings on the results of the implementation of the sectoral support reviewed in the independent ex-post evaluations implemented pursuant to Article 31.10 of the CFP Regulation (EU) 1380/2013 generally published on an EU website close or after the date of expiration of the Protocol subject to the evaluation.

⁸⁵ Registration in the Finance Laws is required by the Protocols. However, ex-post evaluations and feedback received indicate that the reference to the sectoral support in the financing law is now always sufficiently explicit to be readily understandable by the public (e.g. sectoral support may be identified as “fishing agreement” or “support to fisheries sector” or “EU project”).

Other documents such as the annual and multiannual programmes, the implementation guidelines, the annual or final implementation reports submitted by partner third countries and the rationale underpinning the decisions on payments of tranches by the Joint Committees are part the minutes of the Joint Committees which are not published.

Whilst some stakeholders⁸⁶ acknowledged the contribution of the ex-post evaluations in providing awareness about what was done under the expired Protocols, all stakeholders consulted through our targeted consultation programme raised a perceived lack of transparency on the implementation of the sectoral support, particularly on the multi-annual and annual programmes agreed, their results over time and the targeted beneficiaries of the activities implemented. There was a strong consensus, if not unanimity, among the different categories of stakeholders consulted during the evaluation (EU Member States, private sector in the EU and in the third countries, multilateral and bilateral donors, NGOs) for improved transparency over the implementation and the results of the sectoral support component of SFPAs. According to feedback received through the targeted consultations, insufficient transparency risks creating a culture of mistrust and mismanagement.

Visibility / communication

All guidelines for implementation of the sectoral support agreed by the Joint Committees, or the Protocol in the case of Mauritania 2015-2021, have provisions mandating the relevant national authorities in the partner third countries to ensure appropriate communication and visibility measures for each activities funded with support of the EU contribution for sectoral support. Measures considered include *inter alia* communication in the national medias, organisation of joint missions, participation of staff of the EU Delegations in conferences and opening ceremonies, and publication of reports on relevant national websites. In some cases, the ongoing multi-annual programmes agreed earmark a specific budget line to support visibility / communication requirements (e.g. Cabo Verde, Cook Islands, Côte d'Ivoire, Mauritania, Senegal). This was an improvement compared to the past. For example, previous multi-annual programmes agreed with Senegal and Seychelles did not consider dedicated funding for communication.

According to feedback received from the Fisheries Attachés and the relevant EU Delegations, visibility and communication promoting the achievements of the sectoral support took various forms, such as attendance of the EU Ambassadors at inaugurations / opening ceremonies organised by the national authorities in presence of members of the government (e.g. Cabo Verde, Côte d'Ivoire, Cook Islands, Mauritania, Senegal, Seychelles), affixing of commemorative plaques on permanent structures (e.g. Cook Islands, Mauritania), articles in national press media (e.g. Morocco), press releases and radio programmes, and official speeches given by EU officials at fisheries and oceans-related events. Other initiatives included the organisation of annual presentation workshops in Mauritania in 2020 and 2021 on activities implemented in the framework of the sectoral support component, and development on a dedicated website in Côte d'Ivoire on the development projects co-funded with the EU contribution for sectoral support⁸⁷.

However, feedback from Fisheries Attachés suggests that communication about the activities implemented under the sectoral support programme was generally below expectations. Minutes of the Joint Committees confirm that in most cases there was a regular need for the EU party to recall communication objectives to the partner third countries. The reasons for the perceived unwillingness of partner third countries to communicate are not well understood, but some feedback received suggests a reluctance to communicate on a topic associated with access of foreign fleets in national waters (the subject is highly politicised in some partner third countries), or inclination to promote

⁸⁶ Some stakeholders in the third countries were not aware of the public status of ex-post evaluation reports

⁸⁷ <http://pagdrh.ci/> (consulted 3 June 2021)

achievements of sectoral support as a result of interventions of the governments funded by the national budget. Other reasons frequently mentioned in the past, such as the lack of funds for communication or the absence of communication guidelines are now mitigated by the European Commission under most of the Protocols renewed recently (e.g. communication budget in the multi-annual programme, adoption of implementing guidelines, including visibility, by the Joint Committees).

The lack of awareness about sectoral support achievements was confirmed by representatives of the civil society and of the fisheries sector in the partner third countries in the framework of our targeted consultation programme, confirming to some extent the feedback received from the Fisheries Attachés on the performances of partner third countries in relation to communication.

4.3 Review of sectoral support activities implemented under the framework of SFPAs

4.3.1 Process / Methods followed

The processes / methods followed to review the activities implemented under the sectoral support component of SFPAs are described in Annex 9. In summary:

- The review concentrated on 24 multi-annual programmes agreed by the two parties under different Protocols, with a focus on activities foreseen for implementation between 2015 and 2020. Some multi-annual programmes included in the scope of the review started before 2015, and some multiannual included in the scope of the review will extend beyond 2020.
- The review included in its scope 508 different activities representing a total EU commitment of EUR 206 million for contribution to the development of the sector through the sectoral support foreseen by the different Protocols.
- The main elements included in the scope of the review are activities foreseen in the multi-annual programme. Changes / adaptations of multi-annual programmes over time agreed between the parties were included when the changes / adaptations were reflected in the matrix of activities shared by DG MARE with the evaluation team.
- The identification of the expected direct beneficiaries of the different activities was based on relevant information available in the multi-annual programmes, cross-checked or completed by own expert judgment. For example, activities supporting monitoring, control and surveillance are assumed to directly benefit managing authorities, while activities supporting the development of infrastructures are assumed to directly benefit the private sector (operators in the fishing sector or artisanal fishing communities depending on the activities).

The next sections present the main features of the sectoral support programmes implemented with the different partner third countries over the period subject to the evaluation. The details of the sectoral programmes including their main achievements are presented in the country fiches shown in Annex 19 of this report.

4.3.2 Fields of intervention of sectoral support and main outcomes

The EU contribution for sectoral support was allocated according to a typology of fields of intervention as shown in the next figure.

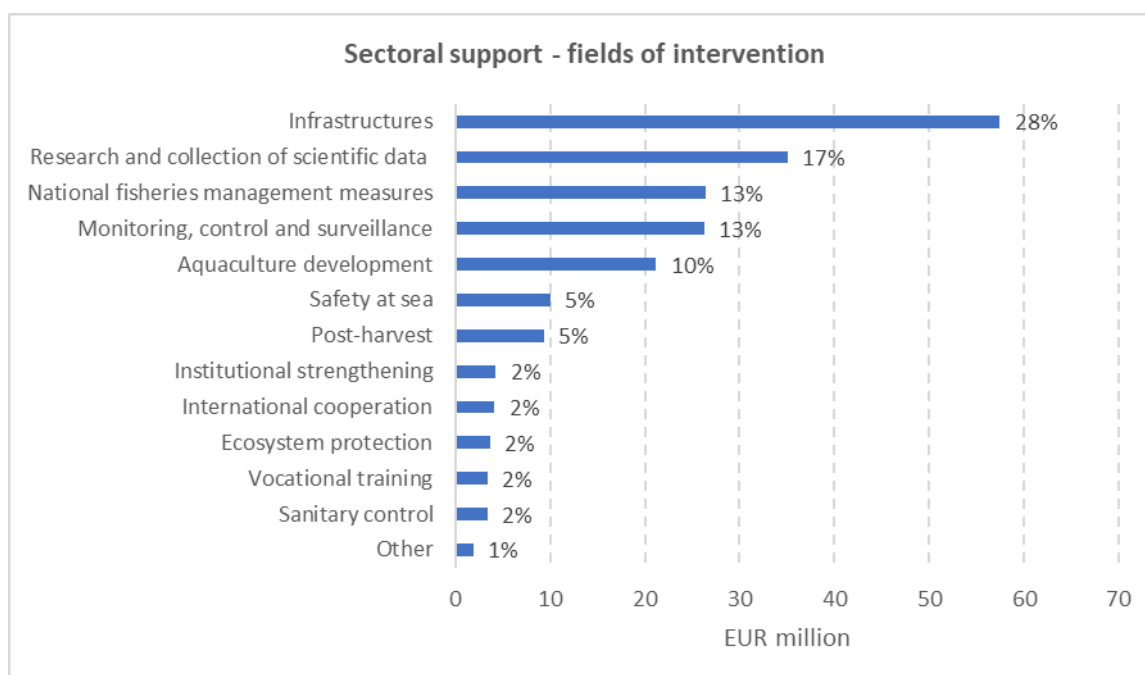


Figure 11: Fields of intervention foreseen for the EU contribution for sectoral support (all partner third countries, focus on the 2015-2020 period)

Source: Own analysis based on a review of the multi-annual programmes, see Annex 9 for process / methods followed

On aggregate over the period considered, four fields of intervention were the focus of EU contributions for sectoral support in the framework of SFPAs (more than 70% of EU commitments in total): infrastructure development (28%), research and collection of scientific data (17%), support to national fisheries management measures (13%) and monitoring, control and surveillance (13%) including the fight against IUU fishing.

Main activities considered for EU support under the multi-annual programmes agreed for utilisation of the EU contribution for sectoral support

Infrastructure (24%, EUR 57.5 million) represented the main focus of intervention for the multi-annual programmes reviewed. However, EU contribution in support of infrastructure for the fisheries and aquaculture sector was concentrated (97%) in Morocco (52% of the total support to infrastructure), Mauritania (25%) and Seychelles (20%). Other partner third countries for which the EU contribution for sectoral support was allocated to infrastructure included Senegal and Guinea Bissau, but for relatively limited amounts (less than EUR 1 million).

- In Morocco, support to infrastructure development was a major feature of the 2014-2018 and 2019-2024 Protocols with an EU contribution to the construction of a number of landing sites for artisanal fishers (*Points de débarquement aménagés*) including facilities for social services (housing for fishers, health centres) and construction / renovation of auctions.
- In Mauritania, EU support to infrastructure development under the 2013-2014 and the 2019-2021 Protocols concentrated on the construction of the port of Tanit (EU support of EUR 14.5 million). Support to infrastructure was also a focus of the 2008-2012 Protocol with an EU contribution to the rehabilitation of the *Marché au Poisson de Nouakchott*, and to the modernisation of the artisanal and industrial ports in Nouadhibou.
- In Seychelles, the EU contribution for sectoral support was identified under the 2014-2020 and 2020-2026 Protocols to build and develop several landing sites for

artisanal fishers (Providence, Bel Ombre) and a number of facilities for artisanal fishers in several districts of the archipelago.

- In Senegal, EU contribution was earmarked for the development of an artisanal landing site in Ndangane Samboun and the rehabilitation of the fish market in Foundiougne under the 2014-2019 Protocol. In Guinea-Bissau, EU contribution was earmarked to support the modernisation of artisanal landing sites in Cacheu, Uracane and Bafata in the framework of the 2014-2017 and 2019-2024 Protocols.

EU support to research and collection of scientific data represented 17% (EUR 35.0 million) of the total EU support foreseen within the framework of the SFPAs implemented between 2015 and 2020. This field of intervention was introduced in the multi-annual programmes agreed with all partner third countries over the period considered, with Morocco (66% of EU contribution to research and data collection), Greenland (18%), Guinea Bissau (4%) and Mauritania (4%) as main partner third countries. Activities earmarked included support for the deployment of scientific surveys of fisheries resources (e.g. Côte d'Ivoire, Greenland, Guinea Bissau, Mauritania, Mauritius, Morocco, Senegal, Seychelles), implementation of data collection schemes on artisanal fisheries (e.g. Cabo Verde, Guinea Bissau, Liberia, Madagascar, Senegal, São Tomé-et-Príncipe). The EU contribution was also programmed to support construction / rehabilitation of research vessels (e.g. Morocco, Senegal) and research laboratories (e.g. Guinea Bissau, Mauritania).

Concerning EU contribution to the development and implementation of national fisheries management measures (EUR 26.4 million, 13% of the total EU support foreseen within the framework of the SFPAs implemented between 2015 and 2020), relevant activities were supported in most partner third countries. A substantial part of the support was included in the multi-annual programme for Morocco for modernisation of the artisanal and coastal fleets. EU contribution to the design and implementation of fisheries management plans was selected in Côte d'Ivoire (small pelagic species), The Gambia (oyster and cockle fisheries), Greenland, Guinea Bissau (national fisheries), Seychelles (fisheries on the Mahé plateau). In Comoros and Kiribati, activities included the deployment and management of anchored Fish Aggregating Devices accessible to artisanal fishing communities. Certain partner third countries considered the sectoral support to develop incentives (loans, grants) for modernisation or adaptation of artisanal fleets (e.g. Cook Islands, Côte d'Ivoire, Mauritius, São Tomé-et-Príncipe, Seychelles).

EU contribution for the strengthening of the capacities of partner third countries to implement effective monitoring, control and surveillance (MCS) of fishing activities in their waters and to fight against IUU fishing was another major focus of activities implemented through multi-annual programmes (EUR 26.3 million, 13% of the total EU support foreseen within the framework of the SFPAs implemented between 2015 and 2020). All multi-annual programmes agreed with partner third countries under the sectoral component of SFPAs included relevant activities. EU contributions supported the deployment of airborne and seaborne patrols in *inter alia* Cabo Verde, Comoros, Côte d'Ivoire, Greenland, Guinea Bissau, Liberia, Senegal, Seychelles, including support to acquisition / rehabilitation of patrol means (e.g. Côte d'Ivoire, Guinea Bissau, Mauritania, Senegal). Development / modernisation of electronic monitoring systems (Vessel Monitoring Systems – VMS) was also an activity included in almost all multi-annual programmes, with a specific emphasis on the development and implementation of Electronic Reporting Systems (ERS) in particular in Cabo Verde, Cook Islands, Côte d'Ivoire, Gabon, Greenland, Guinea Bissau, Madagascar, Mauritania, Mauritius, São Tomé-et-Príncipe and Seychelles. Other key activities implemented included review and alignment with international standards of the legal frameworks governing fishing activities (e.g. Cabo Verde, Côte d'Ivoire, Liberia, The Gambia) or development of participatory surveillance schemes involving artisanal fishing communities (The Gambia, Senegal). Training of inspectors was also a common feature in most multi-annual programmes reviewed.

Aquaculture development (21.2 million, 10% of the total EU support foreseen within the framework of the SFPAs implemented between 2015 and 2020) was included in the multi-annual programmes implemented in the framework of the SFPAs concluded with Cabo Verde, Côte d'Ivoire, The Gambia, Guinea Bissau, Mauritius, Morocco, São Tomé-et-Príncipe and Seychelles. Activities covered policy planning, strengthening of research capacities (all partner third countries mentioned) or implementation of incentive scheme, technical and training facilities for entrepreneurs (Cabo Verde, The Gambia, Morocco, Seychelles).

Safety at sea (EUR 10.0 million, 5% of the total EU support foreseen within the framework of the SFPAs implemented between 2015 and 2020) was a field of activities included in the multi-annual programmes agreed with certain third countries. Activities included strengthening of the response capacity of partner third countries for search and rescue (Morocco, Seychelles), and purchase of safety equipment (e.g. life jackets, GPS) for artisanal fishing communities (e.g. Cabo Verde, Comoros, Cook Islands, Guinea Bissau, Madagascar, Senegal).

The improvement of post harvest conditions (EUR 9.3 million, 5% of the total EU support foreseen within the framework of the SFPAs implemented between 2015 and 2020) was the focus of activities included in the multi-annual programmes agreed with certain third countries to maintain the quality of fish after landing, hence reducing post-harvest losses and securing improved revenues for fishers. Activities supported included support for the purchase of equipment (e.g. ice-making machines, cold rooms, insulated containers onboard) in Cabo Verde, Côte d'Ivoire, The Gambia, Guinea Bissau, Morocco and Seychelles, or development of new fish processing techniques (i.e. smoking) for artisanal fishing communities in Côte d'Ivoire.

Institutional strengthening (EUR 4.3 million, 2% of the total EU support foreseen within the framework of the SFPAs implemented between 2015 and 2020) was a major focus of the multi-annual programme established in the framework of the SFPAs with Guinea Bissau with activities supporting the functioning of the managing authorities (organisational development, equipment, training, communication). This field of activity was also significant in Seychelles (training of SFA staff), in Greenland and in Liberia (PhD studies abroad).

International cooperation (EUR 4.1 million, 2% of the total EU support foreseen within the framework of the SFPAs implemented between 2015 and 2020) mainly involved payments of contributions of certain partner third countries to the relevant international organisations (Cabo Verde, Comoros, Côte d'Ivoire, Guinea Bissau, Liberia, Senegal, São Tomé-et-Príncipe) and financial support for attending international meetings (same partner third countries plus Greenland, Mauritius and Seychelles).

Activities supporting ecosystem protection (EUR 3.6 million, 2% of the total EU support foreseen within the framework of the SFPAs implemented between 2015 and 2020) were considered in the framework of the SFPAs concluded with Cook Island and Kiribati (coral protection), Cabo Verde (shark protection, marine litters), Senegal (depollution and immersion of shipwrecks to create artificial reefs) and The Gambia (regeneration of mangroves). A large part (75%) of the envelope earmarked for this field of activity was allocated under the multi-annual programmes agreed with Mauritania to support environmental awareness and the conservation of two national marine protected areas (*Parc National du Banc d'Arguin, Parc National du Diawling*).

Vocational training (EUR 3.6 million, of the total EU support foreseen within the framework of the SFPAs implemented between 2015 and 2020) considered activities implemented in the framework of the SFPAs concluded with certain partner third countries to attract and to enhance the professional skills of workers in the fisheries sector. In Guinea

Bissau, Mauritania, Morocco and Seychelles the relevant activities supported investments and equipment of training centres. In the particular case of Morocco and Mauritania, activities were designed to support acquisition of navigation simulators (both countries) and acquisition of a school ship (Morocco). In Cabo Verde and Mauritius, activities included training of professional fishers and other actors in the fishing sector.

Sanitary certification of fisheries products (EUR 3.3 million, 2% of the total EU support foreseen within the framework of the SFPAs implemented between 2015 and 2020) included activities to raise the capacities of certain partner third countries up to the standards required to obtain authorisation to export (Comoros, Cook Islands, Guinea Bissau, Kiribati) or to maintain the EU agreement for countries on the list of third countries authorised to export fisheries products to the EU (Gabon, Madagascar, Senegal, Seychelles). The EU contribution considered various form of support, such as construction / equipment of laboratories, ISO certification, training of staff or upgrading of landing facilities (e.g. Senegal).

Support to the implementation of the multi-annual programme: certain multi-annual programmes included activities designed to support their implementation (EUR 1.6 million in total, less than 1% of total EU contributions foreseen within the framework of the SFPAs implemented between 2015 and 2020). Activities included funding of a dedicated structure to coordinate and monitor the implementation of the programme (Cook Islands, The Gambia, Guinea Bissau, Mauritania, Seychelles) and/or dedicated funding to promote the visibility of the partnership (Cabo Verde, Cook Islands, Côte d'Ivoire, Mauritania, Senegal), or funding of external auditors to verify disbursements (e.g. Madagascar, Seychelles).

The review of the different fields of intervention of the sectoral support implemented between 2015 and 2020 suggests that there were few activities implemented under SFPAs addressed the development of sectors of the blue economy which were not fisheries and aquaculture⁸⁸. This was envisaged in the framework of the SFPA implemented with Mauritius as from 2017 (development of blue biotechnologies), but the activity was finally replaced by other activities in 2020, including COVID-response measures.

4.3.3 Review by partner third countries

The following sections show the fields of interventions prioritised under the multi-annual programmes implementing the EU contribution for sectoral support in the context of the SFPAs with the different partner third countries over the period included in the scope of our review. Due to the large differences in the funding available for the scope of the activities to be supported, the review considered separately:

- The "large" multispecies SFPAs concluded with partner third countries in North and West Africa.
- The "large" tuna SFPAs concluded with Seychelles in the Indian Ocean.
- The "small" tuna SFPAs concluded with partner third countries in West Africa.
- The "small" tuna SFPAs concluded with partner third countries in the Indian Ocean.
- The "small" tuna SFPAs concluded with partner third countries in the Pacific Ocean.

The tables below present the percentage of total funding allocated to the different fields of interventions by partner third country. The tables recall the annual amount of funding

⁸⁸ According to the EU Blue Economy report (2021), blue economy activities include i) established sectors: marine living resources (i.e. fisheries and aquaculture), marine non-living resources, marine renewable energy, ports activities, shipbuilding and repair, maritime transport, coastal tourism, and ii) emerging sectors: ocean energy, blue bioeconomy and biotechnology, desalination, marine minerals, maritime defence, research and maritime works (submarine cables, robotics)

available (averaged), and identify the top-four fields of interventions (blue boxes: top-two priorities, grey boxes, next top-two priorities)

The “large” multispecies SFPAs concluded with partner third countries in Africa

Table 26: Proportion of EU contribution for sectoral support allocated to the different fields of intervention in the framework of “large” multispecies SFPAs concluded with partner third countries in North and West Africa

	Morocco	Mauritania	Guinea Bissau	All
Annual budget (EUR Mln)	16.0	4.1	4.0	24.1
Aquaculture development	16%	0%	1%	15%
Ecosystem protection	0%	12%	0%	0%
Infrastructures	30%	64%	7%	27%
Institutional strengthening	0%	0%	20%	2%
International cooperation	0%	0%	6%	1%
Monitoring, control and surveillance	1%	11%	32%	4%
National fisheries management measures	13%	0%	2%	12%
Other	0%	2%	1%	0%
Post-harvest	6%	0%	4%	6%
Research and collection of scientific data	23%	6%	15%	22%
Safety at sea	9%	0%	0%	8%
Sanitary control	0%	0%	8%	1%
Vocational training	2%	5%	4%	2%

Source: Own analysis based on a review of the multi-annual programmes, see Annex 9 for process / methods followed

Note: Blue boxes : top-2 field of interventions prioritised in terms of funding allocated. Grey boxes: next top-2 priorities.

For the “large” multispecies SFPAs concluded with partner third countries in Africa, the fields of intervention prioritised were infrastructure development in Mauritania and Morocco, research and collection of scientific data (Morocco) and ecosystem protection (only in Mauritania). In Guinea Bissau, the different context oriented the prioritisation towards Monitoring, Control and Surveillance and institutional strengthening.

The “large” tuna SFPAs concluded with Seychelles in the Indian Ocean

Table 27: Proportion of EU contribution for sectoral support allocated to the different fields of intervention in the framework of the “large” tunas SFPAs concluded with Seychelles

	Seychelles
Annual budget (EUR Mln)	2.6
Aquaculture development	9%
Ecosystem protection	0%
Infrastructures	36%
Institutional strengthening	6%
International cooperation	4%
Monitoring, control and surveillance	18%
National fisheries management measures	17%
Other	1%
Post-harvest	5%
Research and collection of scientific data	2%

Safety at sea	1%
Sanitary control	0%
Vocational training	0%

Source: Own analysis based on a review of the multi-annual programmes, see Annex 9 for process / methods followed

Note: Blue boxes : top-2 field of interventions prioritised in terms of funding allocated. Grey boxes: next top-2 priorities.

For Seychelles, the priorities identified for implementation of the sectoral support were infrastructure development and monitoring, control and surveillance. National fisheries management measures (e.g. management plans, incentives for fishers) and aquaculture were the next priorities.

The “small” tuna SFPAs concluded with partner third countries in Africa

Table 28: Proportion of EU contribution for sectoral support allocated to the different fields of intervention in the framework of “small” tuna SFPAs concluded with partner third countries in Africa

	Cabo Verde	Cote d'Ivoire	Gabon	Liberia	São Tomé	The Gambia	All
Annual budget (EUR Mln)	0.4	0.3	0.5	0.3	0.4	0.3	2.1
Aquaculture development	3%	9%	0%	0%	27%	5%	10%
Ecosystem protection	4%	0%	0%	0%	0%	2%	1%
Infrastructures	0%	0%	0%	0%	0%	0%	0%
Institutional strengthening	2%	3%	0%	17%	0%	0%	3%
International cooperation	13%	12%	0%	8%	10%	0%	9%
Monitoring, control and surveillance	42%	41%	50%	64%	37%	21%	41%
National fisheries management measures	5%	14%	0%	0%	7%	32%	10%
Other	6%	2%	0%	0%	0%	12%	3%
Post-harvest	2%	2%	0%	0%	17%	24%	8%
Research and collection of scientific data	15%	18%	0%	10%	1%	2%	11%
Safety at sea	3%	0%	0%	0%	0%	0%	1%
Sanitary control	0%	0%	50%	0%	0%	0%	5%
Vocational training	5%	0%	0%	0%	0%	0%	1%

Source: Own analysis based on a review of the multi-annual programmes, see Annex 9 for process / methods followed

Note: Blue boxes : top-2 field of interventions prioritised in terms of funding allocated. Grey boxes: next top-2 priorities.

For the “small” tuna SFPAs concluded with partner third countries in Africa, a common feature was the prioritisation of funding on Monitoring and Surveillance, with international cooperation also appearing in the top-four fields of intervention prioritised. Research and collection of scientific data was prioritised for funding in Cabo Verde, Côte d’Ivoire, and in Liberia to a lesser extent. Strengthening of capacities for sanitary certification was selected only in Gabon, and aquaculture development a priority in São Tomé-et-Príncipe. Probably as a result of the envelopes available, the sectoral support programmes implemented in these partner third countries did not address infrastructure development, and allocated relatively small proportions of the budgets to ecosystem protection, safety at sea and vocational training.

The “small” tuna SFPAs concluded with partner third countries in the Indian Ocean

Table 29: Proportion of EU contribution for sectoral support allocated to the different fields of intervention in the framework of “small” tuna SFPAs concluded with partner third countries in the Indian Ocean

	Comoros	Madagascar	Mauritius	All
Annual budget (EUR Mln)	0.3	0.7	0.3	1.3
Aquaculture development	0%	0%	20%	7%
Ecosystem protection	0%	0%	4%	1%
Infrastructures	8%	0%	0%	2%
Institutional strengthening	0%	0%	0%	0%
International cooperation	8%	0%	3%	3%
Monitoring, control and surveillance	7%	48%	28%	32%
National fisheries management measures	61%	11%	19%	24%
Other	0%	0%	6%	2%
Post-harvest	0%	0%	0%	0%
Research and collection of scientific data	0%	4%	14%	7%
Safety at sea	6%	2%	0%	2%
Sanitary control	10%	35%	0%	17%
Vocational training	0%	0%	2%	1%

Source: Own analysis based on a review of the multi-annual programmes, see Annex 9 for process / methods followed

Note: Blue boxes : top-2 field of interventions prioritised in terms of funding allocated. Grey boxes: next top-2 priorities.

Monitoring, control and surveillance was the priority selected for Madagascar and Mauritius in terms of allocation of funding available. In the case of Comoros and Madagascar, support to sanitary control was a second priority. In Comoros, the priority selected was to support national fisheries management measures such as deployment of anchored fish aggregating devices, and enhancement of landing and marketing facilities for fishers, while aquaculture development was in the priorities selected in the case of Mauritius.

The “small” tuna SFPAs concluded with partner third countries in the Pacific Ocean

Table 30: Proportion of EU contribution for sectoral support allocated to the different fields of intervention in the framework of tuna SFPAs concluded with partner third countries in the Pacific Ocean

	Kiribati	Cook Islands	All
Annual budget (EUR Mln)	0.4	0.4	0.7
Aquaculture development	0%	0%	0%
Ecosystem protection	26%	3%	17%
Infrastructures	0%	0%	0%
Institutional strengthening	0%	2%	1%
International cooperation	0%	0%	0%
Monitoring, control and surveillance	0%	23%	9%
National fisheries management measures	67%	28%	51%
Other	0%	15%	6%
Post-harvest	0%	0%	0%
Research and collection of scientific data	0%	0%	0%
Safety at sea	0%	5%	2%
Sanitary control	7%	24%	14%
Vocational training	0%	0%	0%

Source: Own analysis based on a review of the multi-annual programmes, see Annex 9 for process / methods followed

Note: Blue boxes : top-2 field of interventions prioritised in terms of funding allocated. Grey boxes: next top-2 priorities.

For both Kiribati and Cook Islands, priorities for funding considered support to national fisheries management measures, often consisting in the programme supporting the artisanal fishing communities in the islands. Both partner third countries also included support to sanitary controls in the prioritised fields of intervention.

4.3.4 Allocation of the EU contribution for sectoral support by types of direct beneficiaries

The main finding from the figure below is that overall, 48% of the EU contribution for sectoral support directly benefited public authorities in the partner third countries in the implementation of their tasks (28 % benefiting to managing authorities and 20% to research institutes) and 52% was utilised to support public interventions directly benefiting the private sector (19% for operators in the fishing and aquaculture sectors, incl. processing, and 33% to artisanal fishing communities).

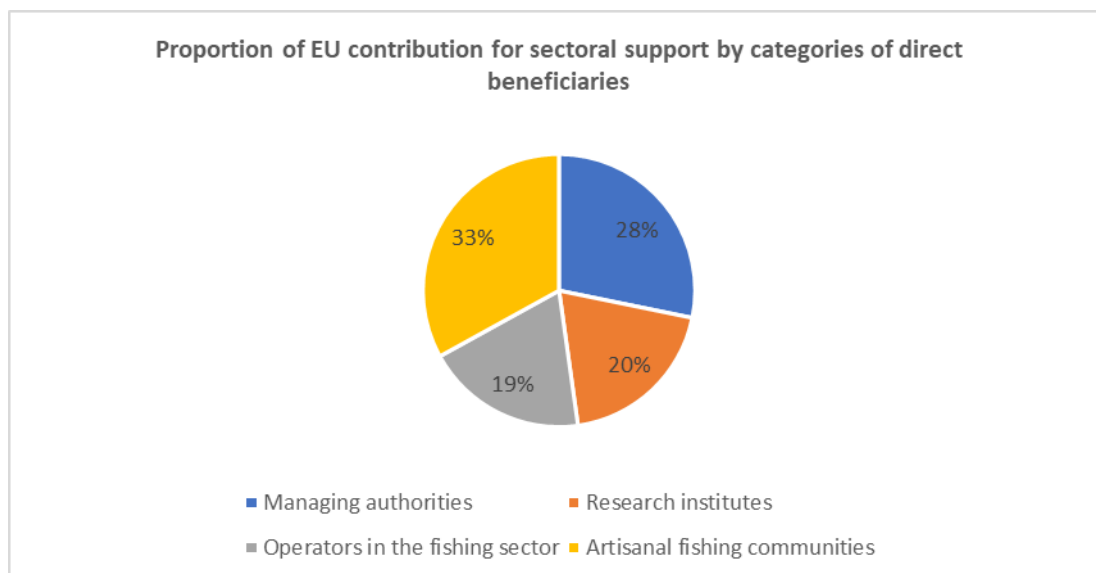


Figure 12: Proportion of EU contribution for sectoral support by categories of direct beneficiaries of the activities foreseen in the multi-annual programmes (all partner third countries included, focus on the 2015–2020 period)

Source: Own analysis based on a review of the multi-annual programmes, see Annex 9 for process / methods followed

Identification of the direct beneficiaries of EU contributions in partner third countries is shown in the next figure, with partner third countries sorted according to the proportion of EU contribution for sectoral support earmarked to support the private sector (operators in the fishing sector and artisanal fishing communities), from the highest to the lowest.

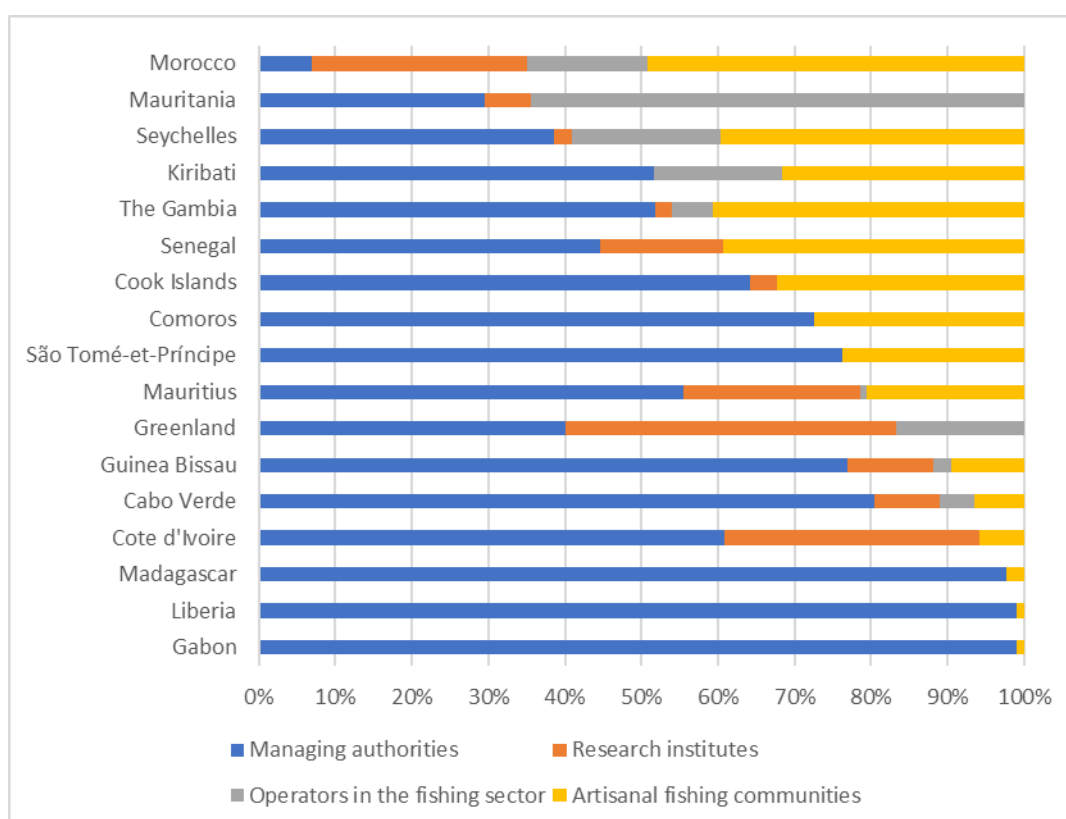


Figure 13: Relative shares (%) of the EU contribution for sectoral support according to the categories of entities expected to directly benefit from the activities.

Source: Own analysis based on a review of the multi-annual programmes, see Annex 9 for process / methods followed

- The EU contribution for sectoral support directly contributed to public investments benefiting to the operators in the fisheries sector in the partner third countries for which the envelopes available were relatively substantial compared to other partner third countries. Benefits to the operators in the fisheries sector are expected mostly through the infrastructure development programmes targeted for artisanal fishing communities (e.g. Morocco, Seychelles), or for different types of operators (Mauritania), but not only (e.g. safety at sea, fleet modernisation). However, the multi-annual programmes implemented in the framework of certain partner third countries with comparatively low funding available also considered allocation of a significant share ($\approx 50\%$) of support for the benefit of the private sector, particularly artisanal fishing communities (e.g. Kiribati, The Gambia).
- In the case of Guinea Bissau and Greenland benefiting from comparatively substantial EU contributions for sectoral support, the majority of funding available supported public authorities in the implementation of their tasks, reflecting in the case of Guinea Bissau insufficient funding available from other sources to support the work of the national managing authorities, and in the case of Greenland, an emphasis of EU sectoral support on fisheries management, including control, and on research capacities. However, for these two partner third countries, whilst the public authorities were the major beneficiary of the EU contributions for sectoral support, the comparatively low percentage of EU contributions targeting the private sector resulted in relatively high amounts in absolute value (e.g. about EUR 2.5 million of the EU contribution for sectoral support in Greenland is expected to support the inshore domestic fleet).
- At the other end of the scale, EU contribution for sectoral support in certain partner third countries concentrated almost exclusively on support to the public authorities

in the implementation of their tasks (i.e. Gabon, Liberia, Madagascar) also probably reflecting the needs of the key institutions (fisheries management, control, sanitary certification, data collection) underpinned by insufficient resources available from other sources, including national sources. For these three partner third countries, the EU contribution for sectoral support was relatively limited (e.g. annual budget of circa EUR 500 000).

- For other partner third countries, the public institutions were the main direct beneficiaries of EU contribution for sectoral support (75% of funding available on average), with the remaining part of funding (25% on average) was earmarked to support activities benefiting to the private sector, in particular the artisanal fishing communities (e.g. Cabo Verde, Mauritius, São Tomé-et-Príncipe, Comoros, Cook Islands and Senegal). For all these six partner third countries, the funding available through the EU contribution for sectoral support was relatively limited.

4.3.5 Contribution of the EU contribution for sectoral support to the United-Nations Sustainable Development Goals

The EU contribution for sectoral support within the framework of SFPAs supported partner third countries in achieving the development objectives set out under Sustainable Development Goal 14 (Life below water) adopted by the United Nations. SDG 14 recognises the importance of the conservation and sustainable use of the oceans and seas and of their resources for sustainable development, including through their contributions to poverty eradication (SDG 1), food security and creation of sustainable livelihoods and decent work (SDG 2), gender equality (SDG 5), sustained economic growth (SDG 8), while at the same time protecting biodiversity and the marine environment and addressing the impacts of climate change and sets targets that aim to promote sustainable use, inclusivity, resilience, and equitable distribution of benefits (SDG 12).

SDG 14 includes 10 specific targets recalled in Annex 11, some of them being directly linked to the management of fishing activities, such as target 14.2 (avoid significant adverse impacts on ecosystems), 14.4 (regulate harvesting and end overfishing and IUU fishing), 14.a (increase scientific knowledge), 14.b (access to markets) and 14.c (implementation of international standards).

The table below shows how the different fields of intervention of the sectoral support component contributed to the relevant SDG goals and SDG targets. Most interventions contributed to a certain extent to the SDG targets relevant to fisheries. However, some activities implemented under the sectoral support component were also relevant to SDG 8 (sustained economic growth), and particularly SDG target 8.8 on working conditions. Aquaculture development typically addresses a number of SDGs. Note that for SDG 14.7 (increase the economic benefits to Small Island developing States and least developed countries from the sustainable use of marine resources, including through sustainable management of fisheries, aquaculture and tourism) addressing particularly SIDS and LDC, we considered by convention that all fields of intervention of the EU sectoral support contribute to this target for the relevant partner third countries.

Table 31: Main SDG goals / targets addressed by the activities implemented under the different fields of intervention of the sectoral support component of SFPAs

Fields of intervention	Main SDG goals / SDG targets supported
Aquaculture development	Multi (SDG 1, SDG 2, SDG 3, SDG 12, SDG 13, SDG 14)
Ecosystem protection	SDG target 14.2
Infrastructures	SDG target 14.b
Institutional strengthening	SDG target 14.4
International cooperation	SDG target 14.c
Monitoring, control and surveillance	SDG target 14.4
National fisheries management measures	SDG target 14.4
Other	SDG goal 14
Post-harvest	SDG target 14.b
Research and collection of scientific data	SDG target 14.a
Safety at sea	SDG goal 8
Sanitary control	SDG target 14.b
Vocational training	SDG target 8

Source: Own elaboration

The budgets of the EU contribution for sectoral support within the framework of SFPAs earmarked to support the achievements of SDG Goals and Targets are displayed below based on data shown in Figure 11 and the connection with the fields of activity proposed in Table 31 above. Considering all partner third countries, 34% of the EU contribution for sectoral support was intended to support achievement of SDG target 14.b (access to markets) through support to infrastructure development, improvement of post-harvest conditions and sanitary control. The other main focus of the EU interventions for sectoral support were SDG target 14.4 (regulate harvesting and end overfishing and IUU fishing) with 27% of budgets earmarked and SDG target 14.a (increase scientific knowledge) with 17% of budgets earmarked.

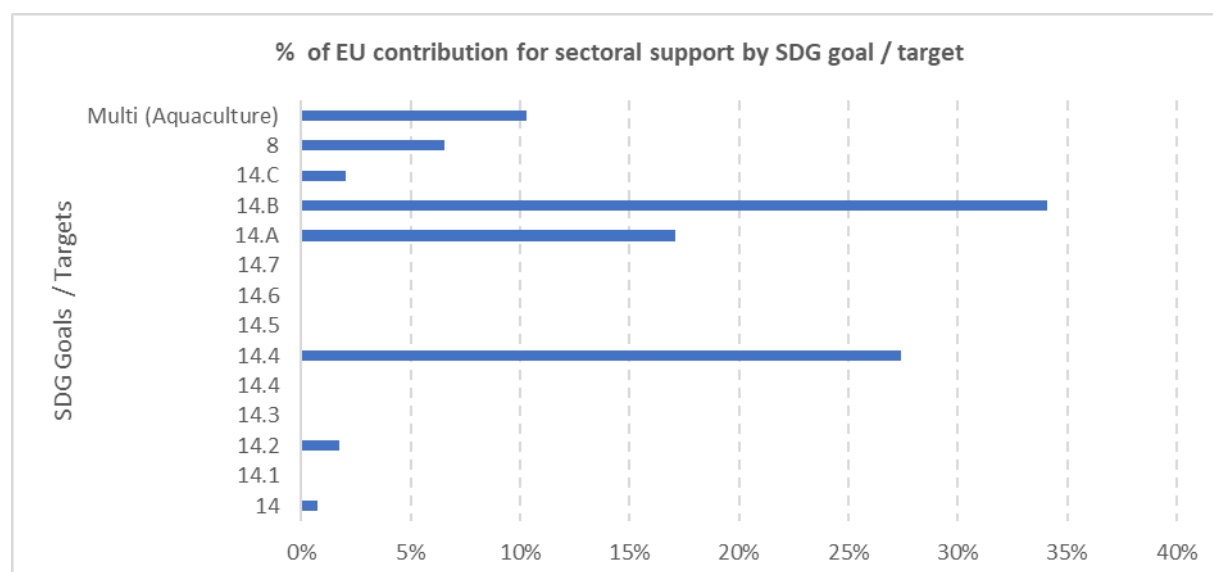


Figure 14: Relative proportion of the EU financial contribution for sectoral support by SDG 14 goal / target, all partner third countries included

Source: Own elaboration based on figures in Figure 11 and correspondence proposed in Table 31

The assessment of the contribution of sectoral support to SDGs by partner third country provides a different picture. For most “small SFPAs” (from a financial perspective), the concentration of budgets supporting activities implemented under the sectoral support component was on SDG target 14.4 (regulate harvesting and end overfishing and IUU fishing): Cabo Verde, Comoros, Cook Islands, Côte d’Ivoire, Gabon, Kiribati, Liberia, Madagascar, Mauritius, São Tomé-et-Príncipe and The Gambia. SDG target 14.4 was also the focus of interventions under some “large SFPAs” from a financial perspective: Greenland, Guinea Bissau and Seychelles. Significant budgets were allocated in support of SDG 14.b (access to markets) under the “large SFPAs”: Mauritania, Morocco and Seychelles probably because the envelopes available could be utilised to fund expensive activities, such as infrastructure development. Sectoral support budgets addressing SDG 14.a (increase scientific knowledge) represented a significant share (at least 15%) of the EU contribution for sectoral support in Cabo Verde, Côte d’Ivoire, Greenland, Guinea Bissau, Mauritius, Morocco and Senegal. Concerning SDG target 14.7 which address specifically SIDS and LDC (Cabo Verde, Cook Islands, The Gambia, Guinea Bissau, Liberia, Madagascar, Mauritania, Mauritius, São Tomé-et-Príncipe, Senegal and Seychelles), about 42% of EU contribution for sectoral support was allocated to those partner third countries.

Table 32: Main focus of activities by partner third country and by SDG goal / target

Partner third countries / SDG Goals / Targets	14	14.2	14.4	14.7	14.a	14.b	14.c	8	Multi (aquaculture)
Cabo Verde	6%	4%	49%	X	15%	2%	13%	8%	3%
Comoros	0%	0%	67%	x	0%	18%	8%	6%	0%
Cook Islands	15%	3%	53%	x	0%	24%	0%	5%	0%
Cote d'Ivoire	2%	0%	58%		18%	2%	12%	0%	9%
Gabon	0%	0%	50%		0%	50%	0%	0%	0%
Greenland	0%	0%	54%		43%	0%	3%	0%	0%
Guinea Bissau	1%	0%	54%	x	15%	18%	6%	5%	1%
Kiribati	0%	26%	67%	x	0%	7%	0%	0%	0%
Liberia	0%	0%	82%	x	10%	0%	8%	0%	0%
Madagascar	0%	0%	59%	x	4%	35%	0%	2%	0%
Mauritania	2%	12%	11%	x	6%	64%	0%	5%	0%
Mauritius	6%	4%	47%	x	14%	0%	3%	2%	20%
Morocco	0%	0%	14%		23%	36%	0%	10%	16%
São Tomé	0%	0%	44%	x	1%	17%	10%	0%	27%
Senegal	3%	3%	26%	x	16%	28%	10%	13%	0%
Seychelles	1%	0%	41%	x	2%	41%	4%	1%	9%
The Gambia	12%	2%	54%	x	2%	24%	0%	0%	5%

Source: Own elaboration based on figures in Table 26 to Table 30 and correspondence proposed in Table 31

Note: SDG Target 14.7 is estimated to be addressed by the activities allocated to the other SDG targets in the case of SIDS and LDC. The 'X' in the table denotes partner third countries in the SIDS and LDC groups

4.4 Interactions between EU contribution for sectoral support and EU development programmes implemented under cooperation mechanisms

4.4.1 Main features of EU cooperation programmes with SFPA partner third countries

The tables in Annex 10 provide additional information on the main characteristics of EU development initiatives implemented at a bilateral level in SFPA partner third countries during the 2014-2020 programming period. The main findings are:

- For almost all SFPA partner third countries, the EU cooperation programmes implemented at bilateral level do not include the fisheries sector in the sectors of concentration (Table 34 in Annex 10). However, the fisheries sector was considered in the national indicative programme with Liberia (governance) and with Madagascar (rural development). Nevertheless, the fisheries sector may be included in the political dialogue when it comes to addressing cross-cutting issues such as governance, environment or economic growth according to the EU Delegations consulted.
- By comparison, the sectoral support envelopes committed between 2014 and 2020 were proportionally much lower than the cooperation budgets (i.e. less than 5% of the cooperation budget) in Cabo Verde, Côte d'Ivoire, The Gambia, Liberia, Madagascar and Senegal) or lower (around 10%) in Greenland, Morocco and São Tomé-et-Príncipe. The sectoral support envelope represented a comparatively significant amount (i.e. around 20% of the cooperation budget) in Gabon, Guinea Bissau, Kiribati, Mauritania and Mauritius, and exceeded the cooperation budget in Cook Islands and Seychelles (Table 35 in Annex 10).
- The EU implemented all or part of its bilateral support to almost all SFPAs partner third countries through budget support. The known exceptions are Gabon, Guinea Bissau and Seychelles (Table 36 in Annex 10). One or several budget support contracts were concluded with the each of the other thirteen partner third countries.

4.4.2 Overview of EU development programmes considering fisheries and aquaculture in their scope

The EU implements development programmes including the fisheries and aquaculture sectors in their scope through DG NEAR and DG INTPA. Annex 13 displays a list of ongoing or recently completed programmes, including in their national or regional geographical scope third countries having concluded a SFPA with the EU, based on information provided by DG INTPA for the purpose of this evaluation.

The paragraphs below list the main regional programmes implemented in recent years.

West and Central Africa

- PESCAO (EUR 15 million – 2017-2026) for improved regional governance in West Africa (policy planning, fight against IUU fishing and management of shared resources). (Reference [4] in Annex 13)
- AOTTP (EUR 13.7 million – 2015-2021) for implementation of a scientific tuna tagging programme of Atlantic tunas to provide additional evidence supporting scientific advice. Reference [6] in Annex 13
- FISHTOV2 (EUR 12 million – 2021-2025), a pan-African programme implemented through the African Union institutions to support implementation of key policy instruments, such as the Policy Framework and Reform Strategy and the Africa Blue Economy Strategy. (Reference [7] in Annex 13). FISHTOV2 is the follow-up of the FISHTOV1 programme (Reference [21] in Annex 13).

Indian Ocean

- EEOFISH (EUR 28 million – 2019-2026), to support the implementation of measures contributing to the objectives of Regional Fisheries Management Organisations, the enforcement of RFMO resolutions and to support small scale fishing communities, including EUR 1.5 million to support the development of artisanal fisheries in **Mauritius** Reference [3] in Annex 13. Before EEOFISH, EU contribution towards

comparable objectives was implemented through the SMARTFISH (EUR 30 million 2007-2013 Reference [17] in Annex 13) and SMARTFISH II (EUR 21 million 2010-2014 Reference [18] in Annex 13). All three regional programmes included support to a regional fisheries surveillance plan entailing mutualisation and coordination of control resources of Member States of the Indian Ocean Commission.

Pacific Ocean

- PEUMP (EUR 35 million 2018-2023 plus EUR 10 mln from the Swedish cooperation) supports the sustainable management of tuna and coastal resources, fight against IUU fishing, support to the private sector to increase economic and social benefits from tuna fisheries, maritime spatial planning and capacity building (Reference [2] in Annex 13). Other now completed regional programmes included SCICOFish (EUR 9.5 million 2010-2015) to support research and fisheries management (Reference [24] in Annex 13) and the DEVFishII programme (EUR 8.7 mln 2010-2018) to increase the contribution of tuna fisheries to the economies of coastal States (Reference [25] in Annex 13)

EU programmes implemented at bilateral levels in a recent past included:

- In **Mauritania**, the EU supports i) implementation of the Promopêche programme (EUR 24 million) focused on the development of artisanal fishing communities and artisanal value chains (Reference [5] in Annex 13) and ii) mechanisms to improve the governance of the civil society (EUR 0.4 mln - Reference [12] in Annex 13).
- In **Liberia**, the EU supports i) the EULAP programme (EUR 7 million – 2019-2023) involves technical assistance to the national authority in charge of fisheries and aquaculture, support to small-scale fish farmers, and strengthening capacities of fishing communities for co-management of fisheries (Reference [9] in Annex 13) and ii) a support programme for integrated rice-fish farming (EUR 3.5 million – 2020-2025) (Reference [15] in Annex 13)
- In **Madagascar**, two EU ongoing programmes support i) development of small scale freshwater aquaculture (EUR 1.7 million , 2015-2020 - Reference [11] in Annex 13) and ii) capacity building through oversea training to increase the number of senior management staff in fisheries (EUR 0.4 mln, 2015-2020 - Reference [14] in Annex 13)
- In **São Tomé-et-Príncipe**, The EU supports a programme (EUR 0.4 million – 2017-2022) to strengthen the co-management capacities of fishing communities in the south of São Tomé (Reference [13] in Annex 13).
- In **Senegal**, the now completed ADUPES project in Senegal (EUR 4 million , 2012-2018) sought to improve the management framework of octopus and deep-sea shrimp fisheries (Reference [28] in Annex 13)
- In **Mozambique**, the EU supports interventions supporting the development of artisanal fisheries and small-scale aquaculture (EUR 14 million , 2013-2019 Reference [19] in Annex 13)

For other third countries partner of the EU under SFPAs, the lists provided include small EU interventions (less than EUR 0.3 million) in **Cabo Verde, Guinea Bissau and Morocco**. In addition, **Côte d'Ivoire, São Tomé-et-Príncipe, Senegal and The Gambia** will receive support from the FISH4ACP project aimed at enhancing the productivity and competitiveness of selected artisanal value chains⁸⁹, while ensuring their environmental sustainability and social inclusiveness (Reference [1] in Annex 13).

4.4.3 Coherence, complementarities, and synergies between EU contribution for sectoral support and other EU development programmes

⁸⁹ For example, small scale aquaculture of tilapia in Côte d'Ivoire, oyster gathering and farming in Senegal and in The Gambia

Main findings

The review of the ex-post evaluations triangulated with feedback received from the Fisheries Attachés and the relevant EU Delegations in the framework of this evaluation confirmed that overall, activities implemented under the sectoral component of SFPAs were coherent with activities implemented under EU development programmes. Overall EU interventions under the sectoral support component are assessed to support EU development programmes, and *vice versa*. There are numerous examples of synergies and complementarities between EU contributions for sectoral support and EU development programmes in the partner third countries:

- In all partner third countries, the components of the regional EU development programme on monitoring, control and surveillance (PESCAO in the Central Eastern Atlantic Ocean, SMARTFISH and EEOFISH in the South-West Indian Ocean) contribute to capacity building and modernisation of the control systems of coastal States, in synergy with activities implemented under the sectoral support component of SFPAs. In summary, SFPAs seek to strengthen capacities and resources at national levels, while the regional programmes aim to encourage cooperation between coastal States through the sharing of capacities, resources and information in support of the fight against IUU fishing. Synergies and complementarities are also achieved through interventions of the EU regional programmes in coastal countries, such as training of trainers of inspectors and operators of the Fisheries Monitoring Centres for the implementation of harmonised inspection procedures, and review of the national legal frameworks. For example, the PESCAO programme assessed the legal frameworks of Cabo Verde, Côte d'Ivoire, The Gambia, Guinea Bissau, Liberia, Mauritania and Senegal, and organised training sessions for trainers in all these partner third countries.
- There are also other examples of synergies and complementarities achieved at partner third country levels. Examples include the technical assistance component to the national managing authority under the EULAP programme in Liberia with positive effects on the national capacity to implement the sectoral support programme, and implementation of the first trials for Electronic Reporting of catch under the ADUPES programme in Senegal. Other examples include technical assistance programmes implemented by the EU Delegation in Côte d'Ivoire to support implementation of activities foreseen in the SFPA multiannual programme (financial support to fisher cooperative, aquaculture development), capacity building of artisanal fishing communities in Liberia and São Tomé-et-Príncipe supported by EU development programmes contributing to the achievements of the relevant sectoral support programmes, mobilisation of a dedicated envelope under the SFPA sectoral support programme in Seychelles to contribute to the modernisation of the conditions in Port Victoria, EU development programmes in Cabo Verde to modernise landing infrastructures increasingly used by EU vessels fishing in the framework of the SFPA, and EU support to the establishment of a competent authority for sanitary control of fisheries products in Guinea Bissau in synergy with the relevant activities implemented under the SFPA sectoral support programme.
- EU development programmes also complemented EU interventions under the sectoral support component through support to partner third countries in areas not covered by SFPAs due to the budgets available and/or priorities selected for the multi-annual programmes implemented under SFPAs. Examples include the investments of EU development programmes in the socio-economic development of artisanal fisheries in Mauritania through the Promopêche programme to complement EU intervention under the sectoral support programme, and similar EU development initiatives focused on artisanal fisheries in Liberia (EULAP programme), São Tomé-et-Príncipe and in partner third countries in the Indian

Ocean through relevant component of the SMARTFISH and E€OFISH regional programme (i.e. support to the creation of the *Fédération des Pêcheurs Artisans de l'Océan Indien* under SMARTFISH, and support to artisanal fishing communities in Mauritius under E€OFISH). Other examples include EU support to the development of aquaculture in Madagascar and in Liberia, an area not covered by the SFPA multi-annual programmes under the last Protocols, and EU support to legislative convergence in the field of aquaculture in Morocco. In The Gambia, one of the performance indicators of the sectoral budget support implemented by DG INTPA concerns the social and environmental impacts of fish meal plants, which complements the activities implemented under the sectoral support component of the SFPAs targeting artisanal fishing communities.

Mechanisms implemented to ensure coherence of EU interventions

During the preparation process of the multi-annual cooperation programmes (2014-2020, 2021-2027) with third countries and regions, DG INTPA and DG NEAR lead a consultation process involving all DGs potentially involved, including DG MARE. The consultation process provides opportunities for DG MARE to flag priorities in relation to the fisheries sector and to specify the main field of interventions of the current and forthcoming sectoral support insofar as they can be known at the time of the preparation of the Multi-Annual Indicative Programmes.

At the third countries level, feedback from the EU Delegations consulted during this evaluation suggests that the coherence between the different EU interventions and EU interventions under the sectoral support component of SFPAs is ensured in a satisfactory manner through regular consultations with DG MARE, Fisheries Attachés and EUD staff involved in the monitoring of the sectoral support as appropriate. EU Delegations confirmed receiving sufficient information on the implementation and the performances of the sectoral support, although with some difficulties in some cases (Cabo Verde, Morocco, Mauritania and Senegal).

However, several EU Delegations noted that there are no established formal mechanisms for internal consultations and exchange of information, and that the fluidity of exchanges depends to some extent on the level of engagement of the staff involved. The six Fisheries Attachés indicated different levels of involvement in the EU Delegations' work process, with some Fisheries Attachés acknowledging a full integration in the work of their respective EUD, and some Fisheries Attachés being in a position described by them as peripheral to the core activities of the EUD.

5 Answers to evaluation questions on SFPAs performances

The following sections answer the evaluation questions on the relevance, effectiveness, efficiency, EU added value, coherence and acceptability of the EU interventions through SFPAs. The evaluation questions are those identified in the Evaluation Question Matrix shown in Annex 18.

5.1 Relevance: the extent to which SFPAs were (are still) relevant to address the needs

5.1.1 To what extent is the intervention through SFPAs (still) relevant to contribute to the needs/objectives of the Common Fisheries Policy?

Under the overarching objectives of sustainability (Article 2 of the CFP Regulation (EU) 1380/2013) and the principles of good governance (Article 2 and 3 of the CFP Regulation (EU) 1380/2013), Article 28 of the CFP Regulation (EU) 1380/2013 details the specific objectives of the EU external policy component of the CFP:

- a) actively support and contribute to the development of scientific knowledge;
- b) improve policy coherence of Union initiatives, with particular regards to environmental, trade and development activities and strengthen consistency of actions taken in the context of development cooperation and scientific, technical and economic cooperation;
- c) contribute to sustainable fishing activities that are economically viable within the Union;
- d) ensure that Union fishing activities outside Union waters are based on the same principles and standards as those applicable under Union law in the area of the CFP, while promoting a level-playing-field vis-à-vis third country operators;
- e) promote and support, in all international spheres, action necessary to prevent, deter and eliminate IUU fishing;
- f) promote the establishment and the strengthening of compliance committees of RFMOs, periodical independent performance reviews and appropriate remedial actions [...].

SFPAs are one of the instruments available to contribute to the objectives of the CFP. Other instruments contributing to achieving the CFP objectives in external waters include EU activities in international fisheries organisations (e.g. ICCAT, IOTC, WCPFC), the management of stocks of common interest with third countries (i.e. the so-called Northern Agreements⁹⁰), the SMEFF Regulation (EU) 2017/2403, and the IUU Regulation (EU) 1005/2008.

Analysis of SFPAs and of their implementing Protocols indicates that the intervention is still relevant to contribute to the needs of the CFP. The next sections detail the analysis of the relevance of SFPAs in contributing to the objectives of the CFP for the main features of the instruments.

- SFPAs provide fishing opportunities to EU vessels operating predominantly outside EU waters, thus contributing to the specific objective c) above. The SFPAs and their implementing Protocols define the fishing opportunities available for the EU fleet within the limits of the surplus stocks available, and detail the technical conditions applicable to fishing activities in the waters of the partner third countries, including

⁹⁰ Bilateral and multilateral fishing agreements concluded with the United Kingdom, Norway, Faroe Islands and Iceland.

monitoring, control and surveillance arrangements. These provisions are still relevant to objectives c) and d) above. In addition, the exclusivity clause ensures that no EU fishing vessels other than those eligible for a fishing authorisation within the framework of SFPAs can access the waters of the partner third countries.

- SFPAs and their implementing Protocols include different mechanisms to contribute to the development of scientific knowledge (objective a) above). The mechanisms include: i) mandatory reporting of catch and effort by EU vessels; ii) provisions for boarding of observers to fishing vessels; and iii) establishment of independent Joint Scientific Committees for provision of scientific advice to the Joint Committees, to ensure the conservation of exploited stocks and the mitigation of impacts of fishing activities on the marine environment. In addition, the development and support to the necessary scientific and research institutions in the partner third countries is a stated priority for the sectoral support component of SFPAs (Article 31.1 of the CFP Regulation (EU) 1380/2013).
- Definition of monitoring and control rules applicable to EU vessels within the framework of SFPAs and the application of these rules to third country operators through the non-discrimination clause are relevant to the fight against IUU fishing (objective e) above). In addition, enhancing the capacities of partner third countries for monitoring, control and surveillance is a stated objective for the sectoral support component of SFPAs according to Article 31.1 of the CFP Regulation (EU) 1380/2013.
- The non-discrimination clause introduced in SFPAs supports the establishment of a level-playing-field for EU and third country operators in the waters of the partner third countries. Through the alignment of conditions, the non-discrimination clause is also relevant in ensuring that principles and standards applicable to EU vessels under EU law in the area of the CFP are also applicable to third country operators to the extent possible (objective d) above). The transparency clause is relevant to support the application of the non-discrimination clause and to support collection of relevant information contributing to scientific knowledge.
- The introduction of a clause concerning respect for democratic principles and human rights is relevant to include in SFPAs the essential elements governing EU external actions (objective b) above).

In summary, SFPAs are (and remain) relevant to contribute to the needs/objectives of the EU Common Fisheries Policy in relation to fishing activities taking place in the waters of partner third countries.

5.1.2 To what extent is the intervention through SFPAs (still) relevant to contribute to the needs of third countries?

The needs of third countries can be identified as follows:

For third countries having in their waters a surplus of fisheries resources, SFPAs are an adequate transparent framework to authorise priority access to those resources to EU vessels. For third countries whose waters are located on tuna migration routes, the SFPAs provide a relevant framework to valorise this strategic location of partner third countries through the conclusion of access agreements that allow EU fleets to exploit the fishing opportunities granted to the EU by the relevant RFMOs in their waters. By doing so, third countries receive a financial contribution which is a source of budget income, which can be significant for certain third countries whose economies depend to a large extent on fisheries (e.g. Cook Islands, Guinea Bissau, Greenland, Kiribati, Mauritania, São Tomé-et-Príncipe). Additionally, the third countries authorising EU vessels may expect to derive additional benefits for their economies from the presence of such vessels, such as employment of nationals and landings of fisheries products for their processing industries or their domestic markets as appropriate.

Through the access component which identifies the fishing opportunities available and the technical and financial conditions governing access of EU fishing vessels, SFPAs are relevant in ensuring exploitation of surplus resources available and to foster interactions between the EU fleet and national fishing industries as appropriate. The multiannual periods of time covered by the implementing Protocols also improve the predictability of income for the national budgets of the partner third countries.

Developing third countries, particularly Least Developed Countries and Small-Island Developing States, need support to achieve the Sustainable Development Goals (SDG). This is the case for the SDG 14 (conserve and sustainably use the oceans, seas and marine resources for sustainable development) which recognises the importance of the sustainable use of fishery resources for sustainable development, as well as for the potential for the fisheries sector to contribute to poverty eradication (SDG 1), food security and creation of sustainable livelihoods and decent work (SDG 2), gender equality (SDG 5), sustained economic growth (SDG 8), while at the same time protecting biodiversity and the marine environment and addressing the impacts of climate change and sets targets that aim to promote sustainable use, inclusivity, resilience, and equitable distribution of benefits (SDG 12).

Through the sectoral support component, SFPAs provide a multiannual source of funding to third countries to support the implementation of their national fisheries policy. Article 31.1 of the EU CFP Regulation(EU) 1380/2013 identified two priorities for the utilisation of EU contributions for sectoral support (scientific research and monitoring, control and surveillance) which were relevant to enhance the fisheries governance framework, and left the door open for EU contributions to other capacity building elements concerning the development of a sustainable fisheries policy of the third country. The flexibility provided can be utilised by the two parties to include national priorities in the scope of the sectoral support programmes based on the context, such as *inter alia* infrastructure, trade of fisheries products, international cooperation, or ecosystem protection. The SFPAs also create a framework for political dialogue in the field of fisheries between the EU and the third countries, which is relevant to implement a dedicated partnership between the two parties.

5.1.3 To what extent is the intervention through SFPAs (still) relevant to satisfy the needs of the EU fishing sector?

According to STECF (2020)⁹¹, the EU distant-water fleet comprises fishing vessels of more than 24m fishing predominantly in non-EU waters. In 2018 this fleet represented 0.4% of the number of EU active vessels, but accounted for 14% of all the landings of the EU fleet by weight and 13% by value. Over the years, the number of long-distant water vessels has decreased (from 385 in 2008 to 250 in 2018). However, according to STECF (2020), this has not impacted the level of catches and landings, which have remained largely the same and which in some years even increased. The EU distant-water fleet includes different fleet segments such as large-scale tuna vessels (purse seiners, pole and liners and surface longliners) and large-scale pelagic and demersal trawlers.

Large-scale tuna vessels need access to the waters of coastal third countries to catch highly migratory species along their migration routes, to complement the exploitation of these species in international waters. According to data available, the EU tuna fleet obtained approximately half of its catch in the waters of third countries and the other half in international waters (Table 16 page 35). For pelagic and demersal large-scale trawlers, the need for access to the waters of third countries is underpinned by insufficient fishing opportunities in EU waters due to a lack of historical records in these waters, or

⁹¹ STECF (2020) The 2020 Annual Economic Report on the EU Fishing Fleet (STECF 20-06). EUR 28359 EN, Publications Office of the European Union, Luxembourg, 2020. ISBN 978-92-76-27164-2, doi:10.2760/500525, JRC123089, 432 p

specialisation in the exploitation of certain species potentially subject to relatively wide interannual variations of TACs in EU waters because of their life-history traits (e.g. small pelagics such as herring or mackerel).

Some other EU fishing vessels, including small-scale vessels, also need access to the waters of third countries, particularly where the waters of those third countries are adjacent to their traditional fishing zones in EU waters. This is the case for EU fishing vessels based in the Canary Islands and in Andalucía exploiting zones adjacent to the waters of Mauritania and Morocco, and the case of EU fishing vessels based in La Réunion and Mayotte exploiting zones adjacent to the waters of Madagascar and Mauritius.

For these segments of the EU fleet, the SFPAs are relevant in providing fishing opportunities in the waters of third countries. In addition, EU operators commented during the evaluation that SFPAs offer access conditions governed by a robust legal instrument during the multiannual periods covered by the Protocols (3 to 5 years), ensuring visibility and security of their deployment strategies. Direct access regimes negotiated by the operators with third countries do not provide similar levels of legal security or predictability.

However, there are certain situations that undermine the relevance of SFPAs in satisfying the needs of the EU fishing sector. For certain EU fishing operators, SFPAs cannot satisfy their needs when they are without an implementing Protocol (i.e. dormant) for long periods of time, due to the application of the exclusivity clause, while at the same time their competitors can access the fishing zones. Examples of where SFPAs were therefore not relevant to the needs of EU operators include Equatorial Guinea (dormant since 2001), Gabon (dormant between 2016 and 2021), Senegal (dormant between 2006 and 2014), Madagascar (dormant since 2018) and the SFPAs in the Pacific Ocean with Federated States of Micronesia (dormant since 2010), Solomon Islands (dormant since 2012) and Kiribati (dormant since 2015).

5.1.4 To what extent was the design of interventions through SFPAs appropriate to address the needs?

Answers to the previous evaluation questions confirmed that the design of the intervention through SFPAs was appropriate to addressing the objectives of the CFP, and the needs of third countries and of the EU fishing sector. The decoupling of the EU contribution for access and the EU contribution for sectoral support was relevant to facilitate a distinct disbursement rules of the two components by the parties.

However, the review of SFPAs implemented since 2015 shows that there was a clear correlation between the EU contribution for access and the EU contribution for sectoral support, the latter being established as being at most equal to the value of the EU contribution for access for most Protocols, with some deviations in the contexts of certain recently negotiated Protocols where the value of the EU contribution for sectoral support slightly exceeded the value of the EU contribution for access⁹² (Figure 1 page 12). The proportionality between the EU contribution for access and the EU contribution for sectoral support means that the fishing opportunities negotiated for the EU fleet in the waters of the third countries were the main drivers for the identification of the financial envelope available through the EU contribution for sectoral support to respond the needs of the partner third countries. This resulted in certain partner third countries being allocated different levels of financial annual envelopes as shown in the table below. This undermines in some cases the relevance of the SFPAs to address the needs of the partner third countries.

⁹² Côte d'Ivoire (2018-2024 Protocol), Mauritius (2017-2021), São Tomé-et-Príncipe (2019-2024), Senegal (2019-2024 Protocol), Seychelles (2020-2026 Protocol)

Table 33: Annual EU contributions for sectoral support foreseen under the ongoing or last SFPA implementing Protocols (situation at the end of 2020)

Annual budgets of EUR 2 500 000 and more	Annual budgets of less than EUR 500 000	In between
Morocco	Cabo Verde [2]	Madagascar (EUR 700 000)* [1]
Mauritania [1]	Comoros* [1] [2]	Senegal (EUR 900 000) [1]
Guinea Bissau [1] [2]	Cook Islands [2]	
Greenland	Côte d'Ivoire	
Seychelles [2]	Gabon*	
	The Gambia [1]	
	Kiribati* [1] [2]	
	Liberia [1]	
	Mauritius [2]	
	São Tomé-et-Príncipe [1] [2]	

Source: *Protocols*

Note: * *Protocols expired before 2020*

[1] *Least Developed Country (status in 2020)*

[2] *Small Island Developing State (status in 2020)*

Finally, it is observed that by their nature, SFPAs are relevant instruments when the two basic conditions below are met, without prejudice to other overarching conditions such as respect for democratic principles and human rights:

- The third country could establish, or provide sufficient relevant information, on the existence of a surplus on the basis of the best scientific advice available and/or is in the path of the migrations of highly migratory species.
- There is an interest for the EU fleet to access the waters of the third country to exploit the surplus resources and/or the fishing opportunities on highly migratory species granted to the EU by the relevant RFMO.

When these two conditions are not met, SFPAs are not relevant EU instruments to address the needs of the EU and of the third countries.

5.2 Effectiveness: to what extent were SFPAs successful in achieving their objectives?

Foreword: *the evaluation of the effectiveness and efficiency of SFPAs developed in the next sections does not necessarily include the impacts of the measures implemented in the EU and in the partner third countries to counter the COVID pandemic. The COVID pandemic affected many aspects of SFPAs, but it is too early to measure precisely the magnitude of those impacts. Annex 12 describes the likely main effects of the COVID pandemic on the effectiveness of SFPAs.*

5.2.1 To what extent was the intervention through SFPAs effective to promote sustainable fishing practices in the waters of the partner countries?

Multispecies SFPAs

Based on the understanding that a surplus might be available if stocks are not overexploited, the approach followed by the parties under SFPAs has been until now: i) to allow an increase of fishing opportunities when scientific advice suggested under-exploitation of stocks (e.g. black hake in West Africa in 2016) if there was an interest by the EU fleet; ii) to maintain fishing opportunities when scientific advice suggested a balance between fishing effort and the potential of stocks; and iii) to decrease fishing opportunities when scientific advice concluded an overexploited status. Examples of the latter case included the removal of fishing opportunities for EU vessels for octopus (2012) and moving fishing areas accessible to industrial pelagic trawlers further offshore to decrease fishing

pressure on sardinellas (2015) within the framework of the SFPA concluded with Mauritania. Fishing pressure may, and has been, adapted through the introduction of technical measures, such as time-area closures (Guinea Bissau, Mauritania, Morocco, Senegal). Fishing opportunities are adapted during the negotiations of the Protocols, and during their implementation according to the relevant provision in all SFPAs for a revision of fishing opportunities based on the scientific advice available⁹³. A complementary approach under SFPAs has been to phase out fishing opportunities for non-tuna species under certain SFPAs (Côte d'Ivoire and Gabon), and to refrain from including such fishing opportunities under certain SFPAs despite proposals from the partner third countries for their inclusion (i.e. Liberia).

The effectiveness of the approach followed under SFPAs produced contrasting results (see section 3.4.2). The main stocks of small-pelagic species targeted by the EU fleet (sardine, horse mackerel, mackerel) in the waters of Morocco and Mauritania are now exploited within sustainable limits. The shrimp stocks targeted by the EU fleet in the waters of Mauritania have remained within sustainable limits. For other demersal species caught in limited quantities in mixed fisheries in Mauritania and Morocco, some stocks are within sustainable limits (ex. seabreams), while other are not (ex. grunts). For the regional stocks of black hake exploited in the waters of Morocco, Mauritania, Senegal, and The Gambia, the most recent scientific advice suggested that the stocks are now overexploited underpinning a need to reduce fishing mortality (CECAF, 2019).

The experience from Mauritania indicates that the effectiveness of SFPAs in promoting sustainable fishing practices depends to a large extent on the management regime implemented by the coastal state. Information available suggests that the decrease of EU fishing effort on sardinellas in Mauritania was offset by a dramatic increase in fishing effort by other fleets, with the sardinella stock showing no sign of recovery as a result. A similar situation may occur for the octopus stock with a dramatic increase in artisanal catch driving the stock close to its sustainability limits⁹⁴. This experience shows that adaptation of fishing opportunities for the EU fleet, while appropriate given stock status, may not be sufficient on its own to rebuild overexploited stocks if fishing effort by other fleets is insufficiently regulated by the coastal state. It also highlights the pivotal importance of the non-discrimination clause and of its supporting transparency clause to ensure that management rules imposed on non-EU fishing fleets are aligned with management rules designed in the framework of the SFPAs to ensure sustainability of exploitation.

According to the CFP Regulation (EU) 1380/2013, EU vessels in the framework of multispecies SFPAs should only catch the surplus of the allowable catch. However, until now, the two parties have been unsuccessful in quantifying surplus in a clear and transparent manner, based on the best scientific advice available. According to the minutes of the relevant Joint Scientific Committees, identification of the surplus of the allowable catch has been hindered by different factors, including insufficient information on total catch and effort by the different fishing fleets exploiting the stocks, and in the case of West Africa, a lack of an international cooperation framework for the conservation and management of shared stocks (e.g. small pelagic species, black hakes).

Concerning the impacts of fishing on the marine ecosystem, review of the minutes of the Joint Committees and of the reports of the Joint Scientific Committees shows that little has been achieved until now. The implementation of an ecosystem-based approach to fisheries management was on the agenda of the different Joint Scientific Committees, but has not been addressed due to lack of relevant information or insufficient time available. As a result, there is no evidence of measures introduced in the framework of SFPAs to reduce

⁹³ For example, increased fishing opportunities on black hakes in Mauritania and 15% quota reduction for small pelagic species during the last six-month period of the 2014-2018 Protocol with Morocco were introduced during the periods of implementation of the relevant Protocols.

⁹⁴ IMROP (2019) Groupe de travail scientifique – Rapport de synthèse

the levels of unwanted catch, to avoid interactions with protected species, or to reduce the impacts of fishing gear on the seabed, including on deep-sea vulnerable marine ecosystems. The lack of ecosystem measures implemented in the framework of SFPAs was also raised by several stakeholders during the targeted consultation programme.

Tuna SFPAs

In the case of tuna SFPAs, the conservation and the management of stocks of highly migratory species falls under the responsibility of the relevant RFMO. SFPAs have a limited role beyond ensuring that measures agreed in the framework of SFPAs are aligned with, or do not contravene, conservation and management measures adopted by RFMOs, which was the case for all tuna SFPAs according to the ex-post evaluations reviewed (e.g. capacity limits, support vessels, allowable catch, monitoring and control of vessels).

The same applies to ecosystem measures which fall under the competence of the relevant RFMOs. The ex-post evaluations confirmed that there were no measures implemented under SFPAs that contravened ecosystem measures adopted by RFMOs. Certain Protocols even imposed additional requirements such as the mandatory use of biodegradable and/or non-entangling Fishing Aggregating Devices in the waters of certain third countries (e.g. The Gambia and Seychelles under the Protocols negotiated in 2019 and 2020 respectively), or specific monitoring of shark catch (i.e. Cabo Verde under the Protocol negotiated in 2019). In view of the central location of Seychelles for the purse seine fishery in the Indian Ocean and of Cabo Verde for the longline fishery in the Atlantic Ocean, the introduction of such clauses in the SFPA has a potential leverage effect on other foreign fleet in view of the non-discrimination clause enshrined in the Protocols, but information is lacking to evaluate the extent to which the leverage effect of the clause was successful.

Availability of scientific advice to inform fisheries management in the framework of SFPAs

Table 15 page 35 shows that the Joint Scientific Committees (JSCs) implemented in the framework of the multispecies SFPAs concluded with Guinea-Bissau, Mauritania, Morocco and Senegal to inform the Joint Committee were able to meet on the annual basis as foreseen by the SFPAs, with some exceptions (Guinea Bissau, Senegal) attributable in 2020 and 2021 to the COVID pandemic. The review of the reports of the Joint Scientific Committees triangulates with feedback from participants that the JSCs did not have sufficient information to assess the status of stocks that are not assessed by the relevant regional advisory body (FAO-CECAF), and were not in a position to revise the results of stock assessments carried out within the multilateral framework of FAO-CECAF. Participants also noted that the recommendations of the JSCs on further scientific studies or improved data collection schemes are often not followed up by the parties, hindering in particular the consideration of measures to implement an ecosystem approach to fisheries management. A weakness recurrently flagged by the Joint Scientific Committees was the inadequate implementation of observer programmes on national and other foreign vessels exploiting the same fisheries and in certain cases, and insufficient implementation of observer programmes foreseen by the SFPAs on certain categories of EU vessels. Nonetheless, the Joint Scientific Committees were able to monitor the abundance of key commercial stocks and provide scientific advice on technical measures considered for regulating fishing mortality, such as time-area closures, with recommendations followed up by the Joint Committees.

For tuna SFPAs and the multispecies SFPA concluded with Greenland, scientific advice used by the Joint Committees to inform fisheries management and ecosystem protection within the framework of SFPAs is obtained from the relevant RFMOs (i.e. ICCAT, IOTC and WCPFC for the tuna SFPAs, ICES and NAFO for the Greenland SFPA). In view of the regional distribution of stocks managed by the RFMOs, and the involvement of scientists of the two

parties in the relevant scientific working groups, the implementation of bilateral Joint Scientific Committees was not relevant.

5.2.2 To what extent was the intervention through SFPAs effective to contribute to strengthen capacities of partner countries to monitor and control fishing activities falling under their responsibilities?

All SFPAs included detailed monitoring and control rules applicable to EU vessels authorised to access the waters of the partner third countries. Provisions included measures for monitoring the movements of the EU vessels while in the fishing zones of the partner third countries (Vessel Monitoring System – VMS – entry / exit notifications), measures for reporting catch and effort (paper logbooks and/or Electronic Reporting System – ERS), and measures for observation of fishing activities onboard EU vessels). SFPA provisions ensured exchanges of relevant information between the EU Member States and the partner third countries under the oversight of the European Commission, with an effective contribution to their capacity to manage and control fishing activities falling under their responsibilities. However, the effectiveness of SFPA provisions for monitoring and control of EU vessels may be undermined by a lack of harmonisation of technical rules applicable in the waters of the different partner countries (see Box 5 page 54), and uncertainty over the extent to which other foreign fleets are subject to similar monitoring and control provisions in cases where the non-discrimination clause and its supporting transparency clause are not fully complied with by the partner third countries (see sections 3.7.3 and 3.7.4 page 56).

As established by the CFP Regulation (EU) 1380/2013, strengthening capacities of the partner third countries for monitoring, control and surveillance was one of the priorities selected by the parties for the implementation of the EU contribution for sectoral support. According to the review of activities implemented under the sectoral support component of SFPAs, EU contributions for strengthening the capacities of partner third countries for monitoring, control and surveillance amounted to EUR 26.3 million under SFPAs implemented between 2015 and 2020, representing 13% of the total EU contribution for sectoral support. Strengthening capacities for monitoring, control and surveillance was one of the two main sectors of concentration of the EU contributions for sectoral support implemented within the framework of the SFPAs concluded with Cabo Verde, Côte d’Ivoire, Gabon, The Gambia, Guinea Bissau, Liberia, Madagascar, Mauritius, São Tomé-et-Príncipe and Seychelles (Table 26 to Table 30 page 76), with Kiribati, Mauritania and Morocco being the exceptions for reasons linked to their contexts⁹⁵.

The effectiveness of EU contributions for sectoral support within the framework of SFPAs is difficult to fully evaluate due to a lack of information on the impacts (i.e. the long-term effects) of the interventions. However, the following points may be noted:

- In almost all partner third countries (Cabo Verde, Cook Islands, Côte d’Ivoire, Gabon, Greenland, Guinea Bissau, Madagascar, Mauritania, Mauritius, São Tomé-et-Príncipe and Seychelles), the EU contribution for sectoral support was implemented to scale up the technical capacities of the national Fisheries Monitoring Centres to monitor the activities of fishing vessels in their waters. The EU contribution in this respect involved building rehabilitation, purchase of modern equipment (hardware, software) to monitor VMS positions and to receive electronic catch declaration through the development of an Electronic Reporting System (ERS), as well as training of officers in the use of the systems. These activities were likely to have long-term positive effects, with an effective contribution to the strengthening of the capacities of partner countries to manage and control fishing activities falling under their responsibilities.

⁹⁵ In Morocco, fisheries surveillance is a competence of the Royal Navy. In Mauritania, strengthening MCS capacities was in the sectors of concentration of the German cooperation and of the World Bank. For Kiribati, other priorities probably prevailed in a context of advanced regional integration of the MCS function by the Forum Fisheries Agency supported by the EU and other donors.

- The EU contribution for sectoral support was also used to review and align the legal framework governing fishing activities with international standards (e.g. Cabo Verde, Côte d'Ivoire, Greenland, Liberia, The Gambia) and to draft standardised operational procedures for inspectors. These interventions are likely to have long-lasting effects and were probably effective to strengthen the capacities of the third countries to effectively manage the fisheries under their responsibilities.
- In certain partner third countries, the EU contribution for sectoral support was designed to support the purchase or rehabilitation of patrol vessels and other vehicles used by control authorities (e.g. Côte d'Ivoire, Gabon, Guinea Bissau, Mauritania, Senegal). The evaluation of the effectiveness of these interventions cannot be made without reviewing the records of the utilisation of the patrol vessels and vehicles. However, feedback received through the targeted consultation suggests a lack of effectiveness in certain situations due to: i) patrol vessels being out of service soon after their commissioning as a result of inadequate maintenance (e.g. Guinea Bissau); or ii) assets being unused at all as a result of inappropriate design (e.g. Côte d'Ivoire).
- The EU contribution for sectoral support was implemented to support the running costs of the competent control authorities in certain partner third countries (Cabo Verde, Comoros, Côte d'Ivoire, Greenland, Guinea Bissau, Liberia, Senegal and Seychelles), and in particular to provide funding to deploy airborne or seaborne patrol means (e.g. consumables, at-sea allowances for personnel). Beyond the short-term deterrent effects of the patrols on IUU fishing, the effectiveness of such interventions cannot be measured due to a frequent lack of outcome indicators⁹⁶ in the multi-annual programmes or in the implementation reports, such as the number of vessels sighted / inspected / convicted. The assignment of operational targets, such as the number of vessels inspected/sighted would also ensure that the patrol means are deployed when and in areas where fishing vessels are the most likely to be encountered.

Overall, the effectiveness of the EU contribution to strengthen the capacities of partner countries to manage and control fishing activities falling under their responsibilities and hence to fight IUU fishing was positive. Activities supporting structural changes such as enhanced technical capacities for monitoring, a strengthened legal framework and investments in patrol resources (providing that equipment purchased is adequately maintained in the medium -term) are more likely to have produced positive long-term effects than EU contributions to running costs.

All authorities of EU Member States and of partner third countries acknowledged an overall positive contribution of the sectoral support component on MCS capacities of the partner countries, but without being specific on the positive outcomes of the interventions. However, certain NGOs suggested that the EU contribution implemented in the framework of SFPAs was ineffective in preventing or in lifting the pre-identification (Comoros, Kiribati, Liberia) or identification (Comoros) of those partner third countries under the procedures defined by the IUU Regulation, suggesting that activities implemented within the framework of certain SFPAs to fight IUU fishing may not all have been effective or lasting.

In summary, SFPAs were broadly effective in building the capacities of the partner third countries to monitor and control fishing activities falling under their responsibilities with a positive contribution on the global fight against IUU fishing. The main benefits of the EU interventions within the framework of SFPAs were the identification of measures for the joint monitoring of EU vessels operating in the framework of SFPAs, with a potential leverage effect on other fleets by virtue of the non-discrimination clause, and implementation of a significant share of the EU contribution for sectoral support to: i) enhance the technical and human capacities of the Fisheries Monitoring Centres in the

⁹⁶ Most multiannual programmes reviewed were limited to specification of a number of days or hours of patrols as indicator to measure achievement.

partner third countries with in particular, the implementation of modern cost-effective techniques like the ERS; ii) strengthen the legal framework; and iii) contribute to the deployment of patrol resources. However, the long-term effects of the interventions are not clear, particularly where information is lacking on the extent to which monitoring provisions imposed on EU vessels were extended to other fleets in certain contexts, and where the EU contribution for sectoral support considered contributions to running costs (input indicators) without specification of operational targets (outcome indicators).

5.2.3 To what extent was the intervention through SFPAs effective to contribute to strengthen technical and scientific capacities in support of fisheries management?

All multispecies SFPAs included provisions for submission of fisheries-dependent information to the partner third countries such as catch and effort data. In addition, SFPAs established a framework for the boarding of national observers for collection of other fisheries-dependent information such as quality and quantity of the unwanted catch discarded. A review of the minutes of the Joint Scientific Committees confirms that the review of catch and effort data submitted by the EU fleet was one of the main sources of information used by the Joint Scientific Committees to monitor the abundance of the main commercial stocks targeted by the EU fleet in the framework of SFPAs. However, the same source triangulated with feedback from the targeted consultation suggests that implementation of the observer programmes foreseen by the Protocols did not produce the expected results in terms of the quality of information (i.e. observer coverage achieved compared to Protocols targets, uneven quality of the scientific information reported by observers). The main reason put forward by the relevant stakeholders was a lack of trained observers in the partner third countries, noting that SFPAs had in certain contexts a positive spin-off (e.g. Mauritania) on the reinforcement of the pool of scientific observers. Another reason given was some confusion over the mandate of the observers foreseen by the Protocols: namely, a control mandate, a scientific mandate, or a mix of both.

In the case of highly migratory species, the review of the provisions of the tuna SFPAs established that SFPA requirements in relation to the collection of scientific data are fully aligned with, or do not contravene, the mandatory requirements adopted by the relevant RFMOs applicable to EU vessels wherever they operate. Through provisions for participation of national observers in the observer schemes mandated by RFMOs, SFPAs fostered the involvement of nationals of several coastal States in the observer schemes implemented by EU operators. According to feedback received during the targeted consultation programme, the provision was effective with between 200 and 250 nationals from *inter alia* Comoros, Côte d'Ivoire, Gabon, Guinea, Madagascar, Mauritania, Mauritius, São Tomé-et-Príncipe, Senegal and Seychelles trained by EU operators to collect scientific information onboard their vessels. Nationals from some other partner third countries could not be included in the observer training scheme (e.g. Liberia), but the intention by EU operators is to include them to the extent possible in the medium- to longer-term.

The implementation of the Joint Scientific Committees was also effective in providing a framework for exchanges between the scientific personnel from the EU and from the relevant partner third countries (i.e. Guinea Bissau, Mauritania, Morocco and Senegal). Based on a review of the reports of the Joint Scientific Committees, about 40 researchers from the relevant partner third countries were provided with the opportunity to exchange with EU scientists within this framework, with a likely positive contribution to the mutual strengthening of their capacities.

As established by the CFP Regulation (EU) 1380/2013, the development of the necessary scientific and research institutions in the partner third countries was a priority identified for the implementation of the EU contribution for sectoral support. According to a review of activities implemented under the sectoral support component of SFPAs, EU contributions for strengthening the scientific capacities of partner third countries amounted to EUR 35.0

million under SFPAs implemented between 2015 and 2020, representing 17% of the total EU contributions for sectoral support. This field of intervention was introduced in the multi-annual programmes agreed with all partner third countries in the Atlantic and Indian Oceans over the period considered (Table 26 to Table 30 page 76), with a substantial investment in research capacities of partner third countries in North and West Africa (Morocco, Mauritania, Guinea Bissau and Senegal). Activities included contributions to investments in research facilities (Greenland, Guinea Bissau, Mauritania, Morocco, Senegal) including in the case of Morocco and Senegal acquisition / rehabilitation of research vessels, and support to scientific surveys at sea for stock assessment (e.g. Côte d'Ivoire, Greenland, Guinea Bissau, Mauritania, Mauritius, Morocco, Senegal). The EU contribution for sectoral support also supported data collection schemes (e.g. surveys of artisanal fisheries in the partner third countries in West Africa and in Madagascar, training and deployment of scientific observers in Mauritius, Senegal and Seychelles).

The effectiveness of the EU contributions to strengthening the technical and scientific capacities in support of fisheries management were verified in several partner third countries. In Guinea Bissau, Mauritania, Morocco and Seychelles, there is evidence demonstrating that the scientific information generated by interventions under the sectoral support component of SFPAs was used by the national managing authorities for the design of fisheries management plans. The EU contribution for sectoral support was also effective in seeking alignment of the national observer coverage of the tuna fleets with the prescriptions of the IOTC in the Indian Ocean (i.e. Madagascar, Mauritius and Seychelles). Data collection schemes for artisanal fisheries were probably effective in assessing the contribution of the sector to national fisheries, but also in raising awareness by the authorities of the socio-economic dimensions of the artisanal sector for due consideration in national policies. For a number of developing partner third countries, information on the dimensions of the artisanal sector was lacking despite the potential contribution of the sector in the fight against poverty (e.g. Cabo Verde, Guinea Bissau, Liberia, Madagascar, São Tomé-et-Príncipe).

In summary, SFPAs were effective in supporting the development of the scientific capacities in the partner third countries. Through their access component, SFPAs supported the collection of fisheries-dependent information on the activities of EU vessels in the waters of the partner third countries useful to monitor the abundance of the resources, and fostered the involvement of nationals from the partner third countries in scientific work (i.e. scientific observers, joint analysis in the framework of the Joint Scientific Committees). SFPAs also contributed to the strengthening of research capacities through utilisation of the EU financial contribution for sectoral support for the modernisation of research facilities and implementation of data collection schemes (research surveys, catch sampling) in support of the management of the fishing sector. However, the effectiveness of SFPAs was hindered by the difficulties for certain partner countries in maintaining a sufficient pool of scientific personnel.

5.2.4 To what extent was the intervention through SFPAs effective to contribute to the social and economic development of the fisheries sector in the partner countries?

SFPAs were expected to contribute to the social and economic development of the fisheries sector in the partner third countries through implementation of their access and sectoral support components.

Access component of SFPAs

The review presented in section 3.5.1 of this report shows that the activities of EU fishing vessels contributed to the social and economic development of partner third countries primarily when these vessels used the ports in the third countries for their logistics, and/or when these vessels supplied local fish processing industries. The main beneficiaries of the

activities of EU vessels over the past few years in this regard were Morocco, Mauritania, Cabo Verde, Senegal and Côte d'Ivoire in the Atlantic Ocean, Madagascar, Mauritius and Seychelles in the Indian Ocean, and Kiribati in the Pacific Ocean. A common feature of these partner third countries is that they have port infrastructures adapted for servicing large fishing vessels. By contrast, partner third countries lacking adequate port infrastructure and/or processing industries like Gabon, Guinea Bissau, Liberia and São Tomé-et-Príncipe in the Atlantic Ocean and Comoros in the Indian Ocean, have had little or no interactions with the EU fleet. Utilisation of ports by EU vessels generated additional income for the partner third countries through payments of port charges, and created enabling conditions for further interactions such as employment of national seafarers, boarding of observers, purchase of goods and services for the maintenance of fishing vessels, and sales of fishing products to the local processing industries. In most cases (Côte d'Ivoire, Mauritius, Seychelles) utilisation of the ports in the partner third countries for landings was the initiative of the relevant EU operators rather than being based on specific provisions in the relevant SFPAs. However, in certain cases, use of ports by EU vessels for landings responded to provisions mandated by the SFPAs for all or certain fishing categories (Morocco, Mauritania, Senegal), or incentivised by the SFPAs in the form of discounts on access fees (Cabo Verde, Liberia and Madagascar) – see Table 19 page 43. Logically, SFPAs did not include provisions mandating landings in the ports of partner third countries without adequate port infrastructure.

Certain partner third countries derived significant additional benefits from the activities of EU vessels within the framework of SFPAs through processing of raw material, particularly tuna species, landed by EU vessels. The main beneficiaries were Côte d'Ivoire, Mauritius and Seychelles, and to a lesser extent Cabo Verde and Madagascar. A common feature of these partner third countries is that they have processing industries certified as being compliant with EU food law and duty-free and quota-free access to the EU market for originating products. By contrast, EU landings in ports in Mauritania and Morocco did not incentivise significant sales to the local processing industries due to a mismatch between offer and demand, even though these partner third countries also enjoy duty-free and quota-free access to the EU market for eligible products.

According to the ex-post evaluations of each SFPAs, the activities of the EU fleet in the framework of SFPAs supported the creation of an annual economic value-added⁹⁷ of EUR 477 million, with EUR 232 million of economic value-added benefiting to the EU, and EUR 245 million to third countries (annual average over the 2014-2019 period – see section 3.5.4). As could be expected, based on the scale of the different SFPAs, the 'large' SFPAs concluded with Mauritania, Morocco, Greenland and Seychelles generated 84% of the economic value-added resulting from the SFPAs. The share of the economic value added captured by partner third countries was the highest in those contexts supporting direct interactions with EU vessels through the use of national ports (Côte d'Ivoire, Madagascar Mauritania and Seychelles).

Concerning employment, the activities of EU vessels within the framework of SFPAs are estimated to have created employment for close to 2 850 third countries nationals as crew on EU vessels on average per year between 2015 and 2020, including 2 217 employed on EU tuna vessels and 632 employed on EU non-tuna vessels operating under the multispecies SFPAs concluded with West African countries. Indirect employment in the third countries supported by the operations of EU vessels within the framework of SFPAs is estimated to have supported close to an additional annual average of 15 000 jobs in the third countries, mostly in industrial tuna processing plants. About 60% of work positions in the processing sector (9 000) are occupied by women.

⁹⁷ The economic value-added is the net output of a sector after deducting intermediate inputs from all outputs. It is a measure of the contribution to GDP made by an individual producer, industry or sector (source: STECF).

Employment of nationals from third countries on EU vessels was encouraged by the introduction of relevant provisions in the SFPAs. Compliance with SFPAs provisions was generally satisfactory, and even exceeded in some cases, according to the ex-post evaluations, but was more difficult in other cases (Mauritius, São Tomé and Príncipe and Seychelles). A clear limiting factor was the obligation for EU vessels to employ personnel with the minimum levels of training defined by the International Convention on Standards of Training, Certification and Watchkeeping for Fishing Vessel Personnel adopted by the International Maritime Organisation (Convention STCW-F of the IMO) that EU Member States have ratified⁹⁸. For certain partner third countries, the availability of a workforce trained according to the STCW-F standards was a problem, partly and in some cases mitigated by the provision of training courses by the EU operators at their own cost.

Employment conditions for third country nationals onboard EU vessels are governed by the so-called 'social clause' included in the framework of all SFPAs. According to the EU social partners, the social clause could be improved, in particular by ensuring implementation of the provisions of the Council Directive (EU) 2017/159⁹⁹ which incorporates into EU law the social partners agreement on the Convention C.188 Work in Fishing Convention adopted by the International Labour Organisation (ILO). Feedback received from trade unions in the frame of this evaluation did not raise instances of unfair treatment of nationals of third countries by EU vessel operators, however several references (Côte d'Ivoire, Madagascar, Senegal, Seychelles) were made to the levels of wages paid by EU operators which, according to the trade unions consulted, were below levels determined by the ILO.

In summary, EU intervention through the access component of SFPAs was effective in contributing to maintaining / creating close to 20 000 jobs on average per year between 2015 and 2020 for the nationals of the partner third countries, and to support the creation of an annual average of EUR 477 million of economic value-added. However, the socio-economic benefits derived by third countries from the activities of EU vessels within the framework of SFPAs was unevenly distributed, with higher benefits for third countries that can offer attractive conditions for interactions between their fishing sectors and the EU fleets. Although outdated according to EU social partners, the social clause included in all SFPAs was effective in ensuring decent working conditions for the nationals of partner third countries employed onboard EU vessels, based on feedback from targeted consultations, with the exception of the level of wages raised by some trade unions as potentially being below international standards in certain cases.

Sectoral support component of SFPAs

According to a review of the sectoral support programmes implemented in the different partner countries, about 52% of the EU contribution for sectoral support implemented within the framework of SFPAs applicable between 2015 and 2020 was utilised to support public interventions directly benefiting the economic and social development of the private sector in the partner third countries, and particularly the artisanal sector (33% of the total EU contribution). Main activities benefiting the private sector were infrastructure developments (Guinea Bissau, Morocco, Mauritania, Senegal and Seychelles) which absorbed 24% of the total EU contribution for sectoral support, the improvement of conditions at existing landing sites (storage and processing of artisanal products in Cabo Verde, Côte d'Ivoire, The Gambia, Guinea Bissau, Morocco, Senegal and Seychelles), safety at sea (provision of safety equipment to artisanal fishermen in Cabo Verde, Comoros, Cook

⁹⁸ Among the main EU Member States utilising fishing opportunities available under SFPAs, France, Spain, The Netherlands and Portugal ratified the STCW-F Convention.

⁹⁹ Council Directive (EU) 2017/159 of 19 December 2016 implementing the Agreement concerning the implementation of the Work in Fishing Convention, 2007 of the International Labour Organisation, concluded on 21 May 2012 between the General Confederation of Agricultural Cooperatives in the European Union (Cogeca), the European Transport Workers' Federation (ETF) and the Association of National Organisations of Fishing Enterprises in the European Union (Europêche) (Text with EEA relevance). OJ L 25, 31.1.2017, p. 12–35

Islands, Guinea Bissau, Madagascar and Senegal), and support to vocational training to attract and enhance the professional skills of workers in the fisheries sector (Guinea Bissau, Mauritania, Morocco and Seychelles). Certain partner third countries used the sectoral support funding to develop incentives (loans, grants) for modernisation or adaptation of artisanal fleets (e.g. Cook Islands, Côte d'Ivoire, Mauritius, São Tomé-et-Príncipe, Seychelles).

The long-term effects of these multiple types of interventions are difficult to assess in detail due to the information available, underpinned by the fact that most beneficiaries of these interventions consulted through the targeted consultations were unaware of the origin of the funding used. Nonetheless, evidence drawn from detailed implementation reports submitted by certain partner third countries (e.g. Cook Islands, Kiribati, Morocco and Seychelles) shows that activities supported by the EU contribution for sectoral support were broadly effective in supporting the economic and social development of the fishing sector. However there were some anecdotal reports during the targeted consultations about inadequate facilities being built or certain equipment procured not being used. EU social partners and EU operators also suggested that the sectoral support programmes implemented in several third countries failed to include relevant activities to support the labour dimension of the access component of SFPAs (i.e. training and working conditions of fishers).

For certain partner third countries for which the EU contribution for sectoral support was almost entirely programmed to support the managing authorities (Gabon, Liberia, Madagascar, see Figure 13 page 80), the benefits of the activities implemented under the sectoral support for the economic and social development of the fishing sector were mostly indirect.

Another field of intervention pivotal in ensuring access to markets by operators in the fishing sector in partner third countries was the sanitary certification of fisheries products. Activities to raise the capacity of certain partner third countries to meet the standards required to obtain authorisation to export to the EU (Comoros, Cook Islands, Guinea Bissau, Kiribati) or to maintain the EU agreement for countries on the list of third countries authorised to export fisheries products to the EU (Gabon, Madagascar, Senegal, Seychelles), were included by the two parties in the programmes of interventions of the sectoral support component of SFPAs. The EU intervention was effective in maintaining Gabon, Madagascar, Senegal, and Seychelles in the list of third countries authorised to export fisheries products to the EU, which was critical for these countries due to the contribution of exports of fisheries products to their economies. The EU intervention was also effective in the case of Kiribati (authorised to export fisheries products to the EU since 2017). However, the sectoral support intervention was not effective in the case of Comoros, Cook Islands and Guinea Bissau. In the latter case, the failure of the sectoral support to reach this objective until now was due to a lack of a comprehensive approach, according to feedback received, with some important elements not included in the scope of the multiannual sectoral support programme (or other interventions) such as the regulatory framework, rather than a focus on the construction and equipping of a laboratory.

In summary, EU interventions through the sectoral component of SFPAs between 2015-2020 accounted for 52% of the budget available for activities expected to benefit the social and economic development of the private fishing sector in partner third countries, and particularly the artisanal sector. The activities implemented were varied according to the contextual needs identified, including infrastructure development, improvement in the conditions at landing sites, safety at sea, and vocational training. The extent to which the different activities were effective in contributing to the social and economic development of the fisheries sector in the partner countries is difficult to fully assess due to insufficient information on the long-term impacts of the different activities included in the multiannual programmes. However, evidence available from certain partner third countries suggests

that this was broadly the case. The utilisation of EU contributions for maintaining or obtaining authorisation to export fisheries products to the EU was globally effective.

5.2.5 To what extent was the intervention through SFPAs effective to strengthen regional cooperation for fisheries management?

The review of the minutes of the different Joint Committees and feedback from stakeholders received during the targeted consultations suggest that international cooperation was generally absent from the discussions between the parties. There are few examples of records of discussions considering joint approaches within the framework of RFMOs, and probably as a result, few examples of proposals for conservation and management measures within the framework of RFMOs being co-sponsored by the EU and one or several of its SFPA partner third countries. The apparent lack of regional cooperation initiatives underpinned by SFPAs may be attributable to the absence of relevant provisions in this respect. However, the SFPA concluded with Seychelles in 2020 included for the first time in the history of SFPAs a commitment by the two parties to discuss and coordinate respective decisions, including the possibility to submit joint proposals to the relevant RFMOs (Article 9 of the SFPA between the EU and Seychelles¹⁰⁰). This provision confirms in legal terms the potential role of the SFPAs to support interaction between the EU and partner third countries on issues of relevance for the strengthening of the regional cooperation.

According to feedback received from EU operators during the targeted consultations, SFPAs were not effective in supporting regional cooperation between partner third countries and the EU. The main shortcomings raised were the lack of impetus given by SFPAs to partner third countries to identify regional solutions for the implementation of a coordinated regional organisation of pre-authorisation inspection¹⁰¹ schemes, or regional observer programmes in the Atlantic and Indian Oceans.

Several non-governmental organisations and EU operators also suggested that SFPAs have been ineffective in supporting the development of a relevant international management framework for the conservation and the management of shared stocks in West Africa, as evidenced by the lack of multilateral framework for the conservation and management of shared stocks of small pelagic and demersal species in this region. The regional network of SFPAs in West Africa (Morocco, Mauritania, Senegal, The Gambia, Guinea Bissau) was effective in providing the EU a tool to ensure a regional coordination of fishing pressure deployed by its own fleet on shared stocks, but was not effective in promoting the international management of fishing pressure deployed by other fishing fleets on shared stocks, whether national or foreign.

Certain activities implemented under the sectoral support components of SFPAs addressed the regional dimension of fisheries management. Activities included: i) support to the payment of mandatory contributions due by partner third countries to the relevant RFMOs and as appropriate to the sub-regional fisheries management organisations (e.g. Cabo Verde, Côte d'Ivoire, Guinea Bissau, Liberia, Senegal, São Tomé-et-Príncipe); ii) financial support for attending international meetings (same partner third countries plus Greenland, Mauritius and Seychelles); and iii) activities to support compliance of partner third countries with certain obligations stemming from membership to RFMOs (e.g. Madagascar, Mauritius, Seychelles).

¹⁰⁰ Sustainable Fisheries Partnership Agreement between the European Union and the Republic of Seychelles. ST/5246/2020/INIT. OJ L 60, 28.2.2020, p. 5–44

¹⁰¹ Some SFPAs require a pre-inspection by the authorities of the partner third countries as a condition for issuing a fishing authorisation.

The EU contribution to the payment of mandatory contributions due by partner third countries was effective in the short-term in improving the availability of funding of the relevant RFMOs, and in avoiding potentially embarrassing situations for both the RFMOs and the partner third countries¹⁰² due to significant arrears in payments. However, the review of the financial situation of RFMOs shows that interventions through SFPAs were not effective in supporting the development of a virtuous cycle of timely payments of the mandatory contributions to RFMOs by certain third countries as evidenced by the existence of arrears at the end of 2020 (e.g. Cabo Verde, The Gambia, Guinea Bissau, Liberia, Mauritania, São Tomé-et-Príncipe and Senegal)¹⁰³.

Concerning financial support for attending international meetings, the impacts of funding through SFPAs is difficult to identify, although they probably supported contribution of delegates of the partner third countries to the work of RFMOs in complement to the EU voluntary contributions to RFMOs for the establishment of their internal Meeting Participation Funds available for delegates from developing countries.

Activities to support compliance by partner third countries with certain obligations stemming from their membership of RFMOs proved to be effective in certain contexts according to the relevant ex-post evaluations (i.e. Madagascar, Mauritius and Seychelles). The EU contribution for sectoral support was used to scale up the data collection programmes of these partner third countries, in particular the scientific observer coverage of the national fleets. However, utilisation of the EU contribution for support to compliance with international obligation was not a frequent item in the multiannual programmes implemented in the context of the SFPAs concluded with partner third countries in the Atlantic Ocean, despite the relevant partner third countries being notified of shortcomings in the implementation of their obligations by the ICCAT Secretariat¹⁰⁴. In one case (Guinea Bissau), recurrent shortcomings resulted in consideration of a proposal by the RFMO to 'identify' the partner third country, which is the first step towards international sanctions.

In summary, there is little evidence available to identify a significant role of SFPAs in the strengthening of regional cooperation in recent years. The platform for a sectoral dialogue provided by SFPAs was not used by the parties to strengthen regional cooperation, including in the framework of the relevant RFMOs, apart from the SFPA recently concluded between the EU and Seychelles which may trigger a new approach in this respect. EU operators also noted that SFPAs were not instrumental in encouraging partner third countries to mutualise resources for implementation of certain provisions of SFPAs, such as the provisions for pre-inspections or for observer schemes. The EU financial contribution for sectoral support was used mostly to cover running costs of the third country managing authorities, such as payments of mandatory contributions to RFMOs and expenses of delegates of partner third countries to attend international meetings, with unclear impacts beyond the short-term effects of these interventions. However, the EU financial contribution for sectoral support was effective in supporting compliance by certain partner third countries in the Indian Ocean with their international obligations, noting that similar interventions were probably not sufficiently implemented by the parties in the context of the Atlantic Ocean despite the shortcomings flagged by the relevant RFMO.

5.2.6 To what extent was the intervention through SFPAs effective to support activities of the EU fleet operating in external waters?

Between 2015 and 2020, an annual average of 211 EU fishing vessels utilised the fishing opportunities available under the different SFPAs (Table 8 page 23). The number of EU vessels represents a small percentage of the number of vessels composing the EU fleet

¹⁰² For example, ICCAT and WCPFC may suspend the voting rights of any contracting party when its arrears equal or exceed the amount due from it for the two preceding years.

¹⁰³ Situation on 31.12.2020, Source: ICCAT Report for the biennial period 2020-2021 – Volume 4.

¹⁰⁴ Source: ICCAT Report for the biennial period 2018-2019 – Volume 1

(0.3%), but a significant proportion of EU fleet capacity (19% of total fishing capacity expressed in tonnage – GT, and 6% of the total fishing capacity expressed in power – kW). Catch obtained by EU fishing vessels represented on average close to 300 000 tonnes a year of fisheries products between 2015-2020, representing an average annual first-sale value slightly above EUR 410 million over the same period (Table 11 page 28). SFPAs were effective in securing 9% of the total EU production of wild-caught species in weight, with the contribution of SFPAs to EU production varying according to the category of products targeted in the waters of the partner third countries (21% in the case of highly migratory species, 8% in the case of small pelagic species, and 4% in the case of demersal fish species – see Table 12 page 28).

Fishing opportunities available under SFPAs contributed to some extent to the positive assessment by the STECF (2020)¹⁰⁵ of the continued economic viability of the EU long-distance fleet since 2010 (for 2018, gross and net profit margins of 15.7% and 7.2% respectively or close to EUR 160 million of gross profit and EUR 60 million net profit). The continued economic viability contributed to maintaining about 3 600 work positions for EU nationals (see page 47).

These indicators support the judgment that SFPAs have been broadly effective in supporting the activities of the EU fleet operating in external waters. However, according to feedback received from the industry during targeted consultations, the overall effectiveness of SFPAs is weakened because:

- the network of SFPAs does not include certain fishing zones to which operators may wish access. Based on information received from operators cross-checked with information provided by DG MARE¹⁰⁶, EU operators sought and obtained direct fishing authorisations in the waters of Angola, Congo, Ghana, Guinea, Sierra Leone and Namibia outside the framework of an SFPA. There were also requests from the EU operators for the conclusion of SFPAs with Kenya and Tanzania where direct authorisations are not possible;
- as already noted when discussing the relevance of SFPAs, SFPAs become ineffective in satisfying the needs of the EU fleet when they are without an implementing Protocol (i.e. dormant) for long periods of time, due to the application of the exclusivity clause, while at the same time their competitors can access the fishing zones.

Certain EU Member States having joined the Union in the recent past (e.g. Estonia and Poland) noted that fishing opportunities available to their vessels under the SFPAs concluded with Greenland are allocated to Member States according to a relative stability key that does not reflect the interests of all EU Member States. However, distribution of fishing opportunities obtained in the framework of SFPAs between EU Member States is a competence of the EU Council disjointed in legal terms from the negotiation of SFPAs.

In summary, SFPAs were broadly effective in supporting the activities of an annual average of 211 EU fishing vessels between 2015 and 2020. SFPAs provided an effective framework to support the economic sustainability of the EU external fleet, with positive effects on the employment of 3 600 nationals from EU Member States. According to relevant EU operators, the effectiveness of the EU intervention through SFPAs could be further enhanced by: i) concluding new SFPAs with third countries whose waters present an interest to them; and ii) addressing the case of SFPAs without an implementing Protocol, which have adverse effects on their deployment strategies and on the establishment of a level playing field vis-à-vis their foreign competitors in external waters.

¹⁰⁵ See Table 2-6 in STECF (2020) The 2020 Annual Economic Report on the EU Fishing Fleet (STECF 20-06)

¹⁰⁶ Through the database of fishing authorisations issued

5.3 Efficiency: the relationships between the resources used by SFPAs and the outcomes of the intervention

5.3.1 To what extent were the fishing opportunities negotiated commensurate with the interests of the EU fleet?

The extent to which the fishing opportunities negotiated were commensurate with the interests of the EU fleet can be evaluated considering the utilisation of fishing opportunities available to and used by the EU vessels.

According to the findings detailed in section 3.3 page 28, the levels of utilisation of fishing opportunities were variable according to the context.

For tuna SFPAs, the reference tonnage which defines the level of the non-refundable part of the EU contribution for access was utilised to a fair extent (75% and more) between 2015 and 2020 in the SFPAs concluded with Cabo Verde, Gabon, Kiribati and Seychelles, the latter being the tuna SFA for which the largest reference tonnage was negotiated (50 000 tonnes per year). For other tuna SFPAs, the average utilisation rate over the same period was below 75% on average (The Gambia, Senegal, Côte d'Ivoire, Liberia, São Tomé-et-Príncipe, Comoros, Madagascar, Mauritius and Cook Islands), but for some of these partner third countries, the reference tonnage was approached or exceeded in certain years (Liberia, São Tomé-et-Príncipe and Mauritius). In certain contexts of consistent underutilisation of the reference tonnage over time, the European Commission negotiated a decreased reference tonnage from one Protocol to the next (e.g. Côte d'Ivoire with the reference tonnage decreased by 15% between the 2013-2018 and 2018-2024 Protocols, Mauritius with the reference tonnage decreased by 27% between the 2014-2017 and 2017-2021 Protocols, and Senegal with the reference tonnage decreased by 29% between the 2014-2019 and 2019-2024 Protocols).

For multispecies SFPAs, the levels of utilisation of fishing opportunities available for the different fishing categories since 2015 were variable. In Morocco, the utilisation of fishing opportunities by fishing vessels was consistently high for some categories (category 1 pelagic small-scale fishing in the north, category 2 demersal small-scale fishing in the north (until 2018), category 6 industrial small pelagic vessels), but lower (50% and less) for other categories (category 3 small-scale fishing in the south, category 4 demersal fishing and category 5 artisanal tuna fishing). In Mauritania, utilisation of fishing opportunities available for fishing vessels was high for some categories (category 2 and 2bis vessels targeting black hake and category 3 vessels targeting demersal species other than black hake), but lower for other categories (category 1 shrimp trawlers with a 30% average utilisation rate, category 6 pelagic freezer trawler with a 50% average utilisation rate of the quota available). In Guinea Bissau, utilisation of the fishing opportunities available was high for vessels authorised to target fish and cephalopods species (category 2), but low for fishing vessels authorised to catch shrimps (category 1). In Greenland, utilisation of fishing opportunities negotiated was high as a result of transfers of parts of the quotas obtained by the EU to Norway and Faroes Islands in exchange for fishing opportunities for EU vessels in the waters of these coastal States.

The review of the relevant Protocols implementing multispecies SFPAs shows that the quotas defining the fishing opportunities for the EU fleet were generally maintained from one Protocol to the next without adaptation for underutilised categories. One notable exception was the quota for small pelagic species in Mauritania which was halved between 2006 and 2015¹⁰⁷ to respond to the need to reduce the fishing pressure on the stocks and to the need to seek better alignment of the fishing opportunities with the catch of the EU vessels.

¹⁰⁷ The EU quota for small pelagics in Mauritania was 440 000 tonnes under the 2006-2012 Protocol, then 300 000 tonnes under the 2012-2014 Protocol, and then 225 000 tonnes under the current 2015-2021 Protocol.

The financial impacts of the levels of utilisation on the EU contribution could be measured in the case of tuna SFPAs (see Figure 7 page 30), but not in the case of multispecies SFPAs. The main reason is that the EU financial contribution for access was established as a lump sum covering all fishing categories, preventing identification of the EU contribution paid for each fishing category considered in the Protocols. However, it may be empirically inferred that under-utilisation of fishing opportunities available for EU fishing vessels with a large fishing capacity such as trawlers of category 4 in Morocco or shrimp trawlers and small pelagic trawlers in Mauritania had significant impacts on the efficiency of the EU contribution for access. By contrast, under-utilisation of fishing opportunities for EU artisanal vessels having a lower catching capacity had probably fewer impacts on the efficiency of the EU contribution for access.

In the case of tuna SFPAs, seeking alignment between the reference tonnage and the likely catch of EU tuna vessels during the annual periods covered by the Protocols is a difficult exercise for the negotiators considering the highly migratory nature of tuna species and therefore the annual variability in tuna catches in the fishing zones of the partner third countries. According to EU operators, the density/network of tuna SFPAs in certain sub-regions also has an impact on utilisation of opportunities within particular SFPAs. Examples provided included the lack of access opportunities to Gabon and Equatorial Guinea waters which undermine the interests in access opportunities to the waters of São Tomé-et-Príncipe, and the lack of access opportunities to the waters of Kiribati which undermine the interest in utilisation of the fishing opportunities available in the waters of Cook Islands. In the case of multispecies SFPAs, EU operators raised instances of technical and financial conditions established by the SFPAs discouraging utilisation of the fishing opportunities available. Examples included fishing areas authorised not being appropriate to catch the target species (small pelagic species in Mauritania), and time-area closures resulting in reduced operational capacity to exploit the fishing opportunities (trawlers in Morocco). EU operators also noted that access fees and/or mandatory landing provisions were onerous in some cases, and contributed to discouraging utilisation of fishing opportunities. When technical conditions were objectively hindering utilisation of fishing opportunities, the parties endeavoured to find adequate solutions compatible with the governing principles of SFPAs, particularly in relation to sustainable fishing practices, as evidenced by the minutes of the different Joint Committees.

The review of the SFPAs indicates that the instruments provided few opportunities for the parties to revise the fishing opportunities and the associated EU financial contribution in case of a reduced level of utilisation by EU vessels during the implementation of a Protocol (see section 3.3.4). The only provision in this respect was a termination of the SFPA or of their implementing Protocols where a reduced level of exploitation of fishing opportunities is established. Obviously, this provision was disproportionate, and was never triggered by the EU party.

The review also indicated (see section 3.3.4) that only certain Protocols had relevant provisions for revision of the financial compensation for access where substantial changes of fishing conditions are implemented by the partner third country based on scientific advice to improve the conservation of stocks, with a direct impact on the level of fishing opportunities negotiated, such as establishment of new no-take zones, or implementation of new technical measures impacting the operational capacity of the EU vessels to exploit their fishing opportunities. In the case of multispecies SFPAs, the provisions for adaptation of the EU contribution for access due to reduced quota for certain fishing categories proved difficult to implement due the lack of unequivocal identification of the part of the EU contribution for access allocated to these categories in the relevant SFPAs¹⁰⁸.

¹⁰⁸ For example, the parties encountered difficulties to identify the part of the EU financial contribution for access resulting from the 15% reduction of the EU quota for small pelagic species during the last six-month period of the SFPA implemented with Morocco between 2014 and 2018.

5.3.2 To what extent did EU public investments in SFPAs provided value for money?

According to findings detailed in section 3.5.4 , EU investments in the financial contribution for access in the framework of SFPAs between 2015 and 2020 (EUR 98 million per year on average) supported the creation of an average annual economic value-added of EUR 477 million, with EUR 232 million of economic value-added to the EU, and EUR 245 million to third countries (annual average over the 2014-2019 period). Overall across all SFPAs, EU public investments in the financial contribution for access showed a positive cost-benefit ratio, with every 1 EUR invested by the EU supporting EUR 4.98 of economic value-added for the fisheries sector of the EU and of the partner third countries. The economic value added was generated by the fishing activities of the EU fishing vessels (direct value-added) and by their interactions with the upstream (e.g. supply of good and services to vessels) and downstream (e.g. processing and commercialisation of catch) ancillary industries (indirect value-added).

As shown in Figure 10 page 50 , the cost-benefit ratio of the EU public investment in the financial contribution for access was variable according to the contexts, with a ratio generally higher in the case of tuna SFPAs (e.g. Cabo Verde, Liberia, Madagascar, Mauritius, Seychelles) compared to multispecies SFPAs (i.e. Guinea Bissau, Mauritania and Morocco). The comparatively lower cost-benefit ratio leveraged by multispecies SFPAs may be attributable to higher access costs relative to the value of fish paid by the EU for fishing opportunities, to lower performance in terms of utilisation of fishing opportunities available, and/or a mix of both.

The extent to which the EU public investment in the financial contribution for sectoral support was efficient cannot be assessed. As established by the ex-post evaluations, the outcomes and impacts resulting from activities implemented with the EU contribution for sectoral support, such as a strengthened monitoring and control system or increased capacities for scientific research, cannot be measured in monetary terms.

In summary, the EU public investments through the financial contribution for access within the framework of SFPAs provided value for money as evidenced by the positive cost-benefit ratio of these investments. The access component of SFPAs supported the creation of direct and indirect economic value-added for the fisheries sectors of the EU and of the partner third countries. Information available suggests that the EU investment in the financial contribution for access was more efficient in the context of tuna SFPAs than multispecies SFPAs. The extent to which the EU public investments in the financial contribution for sectoral support provided value for money could not be evaluated due to the difficulties in assessing in monetary terms the benefits of activities implemented under the sectoral support component.

5.3.3 To what extent were sectoral support envelopes aligned with absorption capacity of partner countries?

The absorption capacity of the EU contribution for sectoral support can be assessed through the performance of the partner third countries in utilising the EU contribution for sectoral support within the periods covered by the Protocols. As shown in Table 23 page 67, most partner third countries managed to justify utilisation of the EU financial contribution up to the levels conditioning payments, with all tranches paid within the periods covered by the Protocols as a result (Cabo Verde, Côte d'Ivoire, Gabon, Greenland, Kiribati, Madagascar, Liberia, São Tomé-et-Príncipe and Seychelles). For these partner third countries, it can be concluded that the EU contribution for sectoral support was aligned with their absorption capacity. For some partner third countries, the conditions for payments of all tranches within the multiannual periods covered by the Protocols were not met, resulting in partial

payments of the EU financial contribution for sectoral support identified in the relevant Protocols within the periods covered by them (Guinea Bissau 2014-2017, Mauritania 2006-2012, Mauritius 2014-2017, Morocco 2014-2018 and Senegal 2014-2019).

However, the full payment of the EU contribution for sectoral support within the periods covered by the Protocols did not necessarily mean that the technical implementation of the multiannual programmes was completed. In fact, in most cases, the partner third countries were expected to utilise certain portions of the EU contribution paid to them after the expiry of the Protocols. This resulted from: i) the payment rules established by the Joint Committee authorising payment of 100% of the next tranche if at least 75% of the ongoing tranche (or other % agreed) was utilised; and ii) payments of tranches a few months before the end of the multiannual periods (Cabo Verde, Gabon, Senegal) or after the end of the Protocols (Côte d'Ivoire, Mauritius) without a time limit to justify implementation of the difference. For most Protocols, there was no established time limit for the partner third countries to justify utilisation of the difference between the amount paid and the amount utilised, except in the framework of a couple of SFPAs¹⁰⁹. For the partner third countries which were not paid the full amount of the EU contribution for sectoral support within the periods covered by the Protocols, the unpaid fraction was carried over for utilisation under the future Protocols. There were no firm time limits established for payments of the unused portion of the EU contribution after the end of the Protocols, but in the case of the Protocols signed with Mauritania in 2012 and 2015, there was a provision conditioning payment of the EU contribution for sectoral support foreseen in the Protocols to the full utilisation of the EU contributions implemented under the previous Protocols.

For most partner third countries, the technical implementation of the EU financial contribution for sectoral support was delayed. The difficulties in implementing the multiannual programmes according to the agreed calendars may be linked to the difficulties in committing the relatively large amounts made available by the SFPAs within the time frame of the Protocols (for example, the EU contribution for sectoral support in Mauritania between 2006 and 2012 was EUR 12 million per year, EUR 14 million per year for Morocco under the 2014-2018 Protocol, EUR 3 million per year for Guinea Bissau under the 2014-2017 Protocol, and EUR 2.5 million per year for Seychelles under the 2014-2020 Protocol). However, deviations from the calendars agreed were also detected in partner third countries for which the EU contribution for sectoral support can be regarded as small (around EUR 300 000 per year: Cabo Verde, Côte d'Ivoire, Mauritius, São Tomé-et-Príncipe), or presumably less than the needs (i.e. Madagascar with EUR 700 000 per year).

Based on feedback from the targeted consultation, the review of the minutes of the Joint Committees and the ex-post evaluations, reasons for the difficulties in implementing the EU contribution for sectoral support are multiple.

- As suggested above, the utilisation of large envelopes for the construction of infrastructure within the periods covered by the Protocols was sometimes challenging given complex public procurement procedures for environmental impact assessment, technical pre-feasibility studies, and for contracting the works. Other activities requiring the interventions of external contractors, such as provision of new hardware/software for the Fisheries Monitoring Centres of the partner third countries, also needed to go through public procurement procedures.
- In some cases, delayed utilisation of the EU contribution for sectoral support was explained by lengthy administrative procedures in the partner third country to transfer the EU contribution to the budgets of the Ministry in charge of fisheries. However, this occurred mainly when the *modus operandi* was new for the partner third countries, with corrective measures then implemented with support of the EU party. Some partner third countries also noted that the calendars foreseen by the

¹⁰⁹ Cook Islands 2016-2021 and Côte d'Ivoire 2018-2024: the partner third countries were given 6 month to justify full utilisation of the tranches, with difference deducted if this was not the case.

Protocols did not match the calendars of their national budgets, which created some difficulties in allocating the funding for the relevant fiscal year.

- Political instability in certain partner third countries may also be a compounding factor when this entails frequent changes of staff and priorities within the Government.
- Certain ex-post evaluations raised competition with projects implemented in the fisheries sector by other donors (i.e. the World Bank) offering disbursement procedures seen as more attractive by the Ministry in charge of fisheries because simpler and swifter than the national procedures applying to public expenditures.
- Another reason difficult to assess objectively, but frequently mentioned during the targeted consultations, was a lack of a detailed action plan to implement the main measures foreseen by the national fisheries policies over time. This perspective highlights the relevance of the condition enacted by the EU Financial Regulation for granting budget support where it can be verified that the beneficiary third country has put in place sufficiently credible and relevant sectoral policies.

Review of the minutes of the Joint Committees indicates that the EU party consistently and periodically urged the relevant partner third countries to speed up the implementation of the sectoral support programme when it was delayed, and proposed as appropriate some flexibility such as adaptation of the amount of tranches, reorientation of budgets initially earmarked on activities which proved too long to implement or financing by the sectoral support programme of an external technical assistance to the authorities of the partner third country for the management of the sectoral support (e.g. Seychelles 2014-2020). The absorption capacity of the partner third countries during past Protocols was also considered during the negotiations of the next Protocol by adapting the amount of the EU financial contribution for sectoral support to levels likely to be commensurate with their capacity, or to defer the payment of the EU contribution for sectoral support until the balance of the contribution foreseen under the previous Protocol had been used.

According to feedback received during the targeted consultations, the availability of funds from previous Protocols further hindered the absorption of funds allocated under the ongoing Protocols, in addition to adding another layer of complexity in the joint monitoring of the implementation of the sectoral support programme implemented under the ongoing Protocol. Until now, the approach used in SFPAs for decommitments of the EU contribution for sectoral support as a result of delayed utilisation during the Protocols and after the expiry of the Protocols has been flexible and variable according to the context (see page 66). In summary, delayed implementation during the Protocols was not a circumstance for decommitment, except under a couple of SFPAs¹¹⁰, and utilisation of the EU contribution beyond a period of six months after the expiry of the Protocols was generally authorised, except in the case of five SFPAs for which the Protocols have recently been negotiated¹¹¹. As a result, until now, there have been no occurrences of EU contributions for sectoral support being decommitted (i.e. forfeited) as a result of delayed implementation.

If not specified by the SFPAs, the implementation of activities agreed and already paid for within the framework of a previous Protocol under the current Protocol may also create some legal uncertainty considering that the instrument governing utilisation of the EU contribution for sectoral support under the previous Protocol has expired. This perspective may be different if the ongoing Protocol makes specific references to the utilisation of the EU contribution for sectoral support implemented under the previous Protocol(s). Until now, this was only the case for the Protocol implementing the SFPA with Mauritania between 2012 and 2014, and 2015 and 2021.

¹¹⁰ Cook Islands 2016-2021 and Côte d'Ivoire 2018-2024

¹¹¹ Cabo Verde 2019-2024, Morocco 2019-2024, São Tomé-et-Príncipe 2019-2024, Senegal 2014-2019 and Seychelles 2020-2026.

In summary, the EU contribution for sectoral support was generally aligned with the absorption capacity of the partner third countries within the framework of most SFPAs as evidenced by full payment of the EU contribution for sectoral support identified during the multiannual periods covered by the Protocols. However, in most cases, the full technical implementation of the multiannual programme already paid for was expected to be completed after the expiry of the Protocols. In certain situations, and for certain activities, difficulties in fully implementing the EU contribution for sectoral support within the periods covered by the Protocols is explained by the complexity of the internal administrative procedures of the partner third countries. However relatively vague roadmaps for the implementation of the sectoral policies were also a contributing factor. Until now, the rules implemented under SFPAs have not always provided an adequate incentive for timely utilisation of the EU contribution for sectoral support by the partner third countries. This resulted in most cases in increased complexity due to the need to manage certain parts of the multiannual programmes agreed under previous Protocols within the framework of the ongoing Protocols (if any). Until now, there has been no clear time-limits defined for payments of unused fractions of the EU contribution for sectoral support after the expiry of the Protocols, but certain recently negotiated Protocols suggest that the approach is changing.

5.3.4 To what extent was the EU contribution for sectoral support available in due time, in appropriate quantity and quality at the best price?

The EU contribution for sectoral support was implemented in tranches, with the different tranches paid by the EU before the technical implementation of the activities foreseen under the tranches considered for payment. This system of advance payments of tranches ensured availability of resources in due time for the partner third countries. The amounts of the tranches were defined by most SFPAs on an annual basis, but a review of the minutes of the Joint Committees confirms that there was some flexibility with examples of adaptation of the amounts paid to better meet the needs of the partner third countries.

The EU contribution for sectoral support was implemented according to the budget procedures of the partner third countries, which generally include *inter alia* provisions for public procurement and oversight of utilisation of the national budget by a dedicated national authority. The extent to which the partner third countries' management of public finances was sufficiently transparent, reliable and effective to ensure a fair utilisation of the EU contribution for sectoral support was not considered within the framework of SFPAs, but this was one of the four key conditions continuously verified by the European Commission in the partner third countries eligible to budget support contracts implemented by DG INTPA and DG NEAR (all partner third countries so far, except Gabon, Guinea Bissau and Seychelles). For those three third countries not currently the beneficiary of one or several budget support contracts, the extent to which the management of public finances provides acceptable guarantees was not necessarily assessed by the European Commission.

According to our review of SFPAs and feedback during targeted consultations, there are no explicit provisions in the SFPAs that provide an opportunity for the EU party (the European Commission or its specialised institutions such as the Court of Auditors or the European Anti-Fraud Office) to exercise financial controls over the utilisation of the EU contribution for sectoral support by the partner third countries. According to the Fisheries Attachés, some controls are legally possible based on the SFPA provisions where expenditures are identified in the multiannual programmes as a source of verification of the achievement of the activities. However, implementation of verifications by the EU party of expenses reported by the partner third countries was variable. In some cases, verifications made by the EU party resulted in the suspension of payments due to insufficient evidence of expenses or due to inappropriate utilisation of the EU contribution for sectoral support by the partner third countries. As an example of good practices, the multiannual programmes agreed in the framework of certain SFPAs (e.g. Comoros, Madagascar and Seychelles)

included a provision to fund external audits of disbursements under one or several tranches, and the results of the audits were shared between the two parties.

In summary, the payment mechanisms implemented to transfer the EU contribution for sectoral support to the partner third countries ensured availability of funds in due time. The management of the EU financial contribution for sectoral support was under the responsibility of the authorities of the partner third countries according to national budget procedures, with limited legal competences of the EU party to oversee the utilisation of the budgets. The extent to which the partner third countries' management of public finances was sufficiently transparent, reliable and effective was assessed for partner third countries being a beneficiary of one or several budget support contracts implemented under the EU cooperation programmes.

5.4 Coherence: the extent to which the interventions under SFPAs fit with other intervention

5.4.1 To what extent was the intervention through SFPAs coherent with the sectoral policies of the partner third countries?

The ex-post evaluations, and all the authorities of the partner third countries who provided feedback, confirmed the alignment of the multi-annual programmes implementing the sectoral support component with national sectoral policies. There are no examples of activities implemented under the sectoral support programmes that contravened the objectives of national sectoral policies.

According to the Fisheries Attachés, alignment was ensured through the proactive roles of the partner third countries in the design of the multi-annual programmes submitted for approval by the Joint Committee. The alignment was further facilitated by the fact that two of the priorities enacted Article 31.1 of the CFP Regulation (EU) 1380/2013 (i.e. monitoring, control and surveillance; and support to research) were priorities shared by the partner third countries in their national sectoral policies to strengthen the governance framework. Depending on the resources available, the EU contribution for sectoral support could be used to support other national priorities contributing to the economic and social development of the national fisheries sector, including in some cases the aquaculture sector.

In summary, the EU intervention through the sectoral support component of SFPAs, as implemented by the partner third countries, was fully coherent with the objectives of national sectoral policies.

5.4.2 To what extent was intervention through SFPAs coherent with other EU interventions under the Common Fisheries Policy?

SFPAs are one of the instruments foreseen by the CFP Regulation as ensuring sustainable exploitation, management and conservation of marine resources in external waters in accordance with the EU's international obligations and policy objectives.

The review of the SFPAs and their implementation over time shows that interventions under SFPAs are fully coherent with EU activities in international fisheries organisations. Access rules imposed by SFPAs on EU fishing vessels exploiting resources falling under the management mandate of RFMOs (i.e. highly migratory species) are fully aligned with conservation and management measures adopted by those RFMOs, with a potential leverage effect on other fleets through application of the non-discrimination clause. In certain contexts, SFPAs also impose additional rules not yet binding for the contracting parties, such as the mandatory use of non-entangling biodegradable fish aggregating devices (FADs) in the waters of the partner third countries. Certain activities implemented

under the sectoral support component of SFPAs coherently support compliance by partner third countries with the rules of RFMOs, through for example the strengthening of capacities for monitoring, control and surveillance and integration of activities supporting reporting obligations (observer schemes, data collection schemes on artisanal tuna fisheries) in the multi-annual programmes. The utilisation of part of the EU contribution for sectoral support for the payment of compulsory contributions to RFMOs due by certain countries contributed to ease the financial situation of RFMOs and helped the relevant partner third countries avoid marginalisation for reasons linked to non-payment of their contributions.

The recent initiative to include in SFPAs a commitment by the two parties to discuss and coordinate respective decisions, including the possibility to submit joint proposals to the relevant RFMOs (e.g. Seychelles 2020) legitimised the role of the bilateral framework of SFPAs in strengthening the dialogue on matters of relevance for the improvement of the multilateral framework of RFMOs.

Coherence between SFPAs and EU activities in international fisheries organisations was further ensured by the adoption of the SMEFF Regulation (EU) 2017/2403. According to Article 9 of that regulation, EU fishing vessels may only access the waters of a third country for stocks managed by a Regional Fisheries management Organisation (RFMO) if that third country is a contracting party to that RFMO. It has been verified that this provision is complied with, with all partner third countries being contracting parties of the relevant RFMOs where SFPAs entailed access to stocks managed by those RFMOs. For some partner third countries having joined the multilateral fisheries management framework recently¹¹², the incentive, which became an obligation as from 2017, was clearly effective.

As established by the recent report from the Commission on the application of the IUU Regulation¹¹³, SFPAs supported IUU policy objectives through tools including capacity-building programmes and training, and by strengthening MCS systems, including electronic reporting systems, etc. This had positive additional benefits for the fight against IUU fishing. Furthermore, while the IUU Regulation established that the listing of a partner third country as non-cooperating on IUU fishing (the red card) shall lead to a proposal for cessation of the SFPAs in force, the political decision of the European Commission, at its own initiative, of refraining from renewing SFPAs protocols or not engaging in negotiation of a new SFPAs with third countries which have not tackled shortcomings identified under the yellow cards was coherent with the zero-tolerance approach to IUU fishing promoted by the EU. Nonetheless, synergies between SFPAs and the IUU Regulation could be further strengthened, for example by including, to the extent possible, a clause in the SFPAs encouraging the partner third countries to refrain from granting fishing authorisations to fishing vessels flying the flag of a third country identified by the EU as non-cooperating. There is information suggesting the presence of such fishing vessels concurrently with the presence of EU vessels in the waters of certain partner third countries¹¹⁴.

In summary, EU interventions through SFPAs were coherent with other EU interventions under the Common Fisheries Policy. SFPAs coherently supported EU activities in the framework of international organisations through alignment of access rules with the conservation and management measures adopted by RFMOs, with a potential leverage effect on other fleets through application of the non-discrimination clause. The EU contribution for sectoral support in the framework of SFPAs contributed to enhancing the

¹¹² Liberia, Guinea Bissau and The Gambia became contracting parties of the ICCAT in 2014, 2016 and 2019 respectively.

¹¹³ REPORT FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT AND THE COUNCIL on the application of Council Regulation (EC) No 1005/2008 establishing a community system to prevent, deter and eliminate illegal, unreported and unregulated (IUU) fishing (the IUU Regulation) - COM/2020/772 final 9.12.2020

¹¹⁴ Possibly (to be verified) vessels flagged to Saint Vincent and Grenadines in the waters of Mauritania (Mauritania report to the FiTI) and vessels flagged to Comoros in the waters of Guinea Bissau

capacities of the partner third countries to comply with their international obligations. The clause on regional cooperation recently introduced in one SFPA strengthened the role of SFPAs in supporting international cooperation. EU interventions through SFPAs coherently supported the implementation of the IUU Regulation through capacity building, and coherently accompanied the zero-tolerance approach promoted by the EU through the European Commission's own initiative of refraining from negotiating SFPAs with third countries which have not tackled the shortcomings notified to them under the IUU pre-notification procedures. The synergies between SFPAs and the IUU Regulation could however be even further reinforced.

5.4.3 To what extent was intervention through SFPAs coherent with other EU policies / interventions impacting third countries?

Several EU policies and interventions are relevant in the context of the EU external interventions. Some of these policies / interventions have objectives shared with the objectives of SFPAs in relation to the development of a sustainable fishing sector, the economic and social development of the partner third countries and their integration into the global economy. The next sections evaluate the coherence, including synergies and complementarities, between EU interventions within the framework of SFPAs and the most important EU policies / interventions sharing similar objectives, which include EU overarching policies (international governance, farm to fork) and two selected sectoral EU policies (cooperation and trade).

Overarching EU policies

International governance

SFPAs were coherent with the ambition of the EU international ocean governance agenda adopted in 2016¹¹⁵, in particular through supporting capacity building in the partner third countries, a contribution to the fight against IUU fishing and strengthening the sustainable management of resources, and the efforts to promote decent working conditions in the fisheries sector. SFPAs channelled to the partner third countries close to EUR 200 million between 2015 and 2020 through the EU contribution for sectoral support to implement activities supporting the achievements of the SDG 14 (Life below waters), and particularly SDG target 14.4 (regulate harvesting and end overfishing and IUU fishing), SDG target 14.b (access to markets) and SDG target 14.a (increased scientific knowledge) – see Figure 14 page 82. The contribution of SFPAs to the international ocean governance agenda was acknowledged in the 2019 report of the European Commission on progress achieved¹¹⁶.

However, until the end of 2020, SFPAs included relatively few interventions related to the blue economy outside the traditional fisheries and aquaculture sectors. According to the recent Communication of the European Commission¹¹⁷, support to third countries in advancing and diversifying their sustainable, inclusive and equitable blue economies should be a priority in the medium-term. This was envisaged in the framework of the SFPA implemented with Mauritius from 2017 (development of biotechnologies), but the activity was eventually replaced by other activities in 2020, including COVID-response measures. More needs also to be done in the framework of SFPAs to raise the working standards in fisheries sector of the partner third countries as evidenced by the low number of partner third countries by the end of 2020 having ratified the International Labour Organisation

¹¹⁵ International ocean governance: an agenda for the future of our oceans (JOIN/2016/049 final)

¹¹⁶ Improving International Ocean Governance – Two years of progress (JOIN/2019/4 final)

¹¹⁷ COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS on a new approach for a sustainable blue economy in the EU Transforming the EU's Blue Economy for a Sustainable Future. COM/2021/240 final

Convention C188 and the International Maritime Organisation Convention STCW-F¹¹⁸. The relevance of SFPAs in promoting the ratification by third countries of the IMO STCW-F Convention was identified by the Council Decision (EU) 2015/799¹¹⁹. Review of the minutes of the different Joint Committees confirms that exchanges on accession to these two instruments by the partner third countries was not a frequent item on the agenda.

Farm to fork strategy

The EU Farm to Fork Strategy¹²⁰ aims at accelerating the transition to a fair, healthy and environmentally friendly food system. The measures implemented within the framework of SFPAs to manage the activities of EU fishing vessels in the waters of the partner third countries ensure sustainable fishing practices by EU vessels at the origin of 9% of the total EU production of fisheries products overall between 2015 and 2020, including 21% of the EU production of highly migratory species and 8% of the EU production of small pelagic species (Table 12 page 28). The expected positive benefits of SFPAs on the fisheries governance framework of partner third countries were likely to bring about a positive contribution to the sustainability of fisheries products imported from those partner third countries which represented close to 9% of total EU imports of unprocessed fisheries and aquaculture products in value between 2017 and 2019 (Table 7 page 21). Concerning EU imports of processed fisheries products from partner third countries like Côte d'Ivoire Mauritius or Seychelles, the contribution of SFPAs to sustainability is difficult to identify as fisheries for the raw material processed in these partner third countries do not necessarily fall under the scope of the intervention of SFPAs (e.g. raw material caught in the high seas or in the waters of third countries not party to an SFA).

However, SFPAs have delivered only a relatively minor contribution to raising performance in relation to the other sustainability aspects considered by the Farm to Fork strategy. This concerns in particular the implementation of conservation and management measures to mitigate the impacts of fishing on the broader environment in the framework of multispecies SFPAs. SFPAs also provided an apparent insufficient incentive to promote accession by partner third countries to the international instruments governing training and working standards in the fisheries sector (see above). The enhancement of the protection of the marine ecosystems is also an objective of the EU biodiversity strategy for 2030¹²¹ to which SFPAs could contribute.

EU sectoral policies

Development policy

As detailed in section 4.4 of this report, the review of the ex-post evaluations triangulated with feedback received from the Fisheries Attachés and the relevant EU Delegations in the framework of this evaluation confirmed that overall, activities implemented under the sectoral component of SFPAs were coherent with activities implemented under EU development programmes. Overall EU interventions under the sectoral support component

¹¹⁸ By the end of 2020, Morocco and Senegal ratified the ILO Convention C 188, and The Gambia, Kiribati, Mauritania and Morocco ratified the IMO Convention STCW-F

¹¹⁹ Council Decision (EU) 2015/799 of 18 May 2015 authorising Member States to become party, in the interest of the European Union, to the International Convention on Standards of Training, Certification and Watchkeeping for Fishing Vessel Personnel, of the International Maritime Organization (Text with EEA relevance). OJ L 127, 22.5.2015, p. 20–21

¹²⁰ COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS A Farm to Fork Strategy for a fair, healthy and environmentally-friendly food system. COM/2020/381 final

¹²¹ COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS EU Biodiversity Strategy for 2030 Bringing nature back into our lives. COM/2020/380 final

of SFPAs are assessed as supporting EU development programmes, and *vice versa*. There are numerous examples of synergies between the activities implemented under the sectoral support component of SFPAs and activities implemented at national and regional levels under relevant EU cooperation programmes. There are also examples of complementarities where EU cooperation programmes addressed areas not included in the scope of the SFPA sectoral support programmes as a result of budgets available and/or priorities selected. Furthermore, all EU Delegations confirmed that the presence of an SFPA in the portfolio of EU activities in the partner third countries was useful as a way of including fisheries in the scope of the political dialogue when dealing with cross-cutting issues such as governance, environment or economic growth.

According to feedback received during the evaluation, the coherence between EU interventions under SFPAs and EU interventions under the cooperation programmes is ensured during the programming stages of the multi-annual cooperation programmes through the internal consultations led by DG INTPA / DG NEAR. During the implementation of the programmes, coherence was ensured through regular ad-hoc consultations between DG MARE, Fisheries Attachés and EUD staff involved in the monitoring of the sectoral support as appropriate. However, several EU Delegations noted that there are no established formal mechanisms for internal consultations and exchanges of information during the implementation phases of the EU interventions, and that the fluidity of exchanges depends to some extent on the level of engagement by the staff involved. In addition, certain EU Delegations reported that the approaches implemented by DG INTPA and DG MARE for the management of budget support programmes are different.

Trade policy

SFPAs positively contributed to improved access to EU markets for fisheries products originating in certain partner third countries. The utilisation of the EU contribution for sectoral support in the framework of SFPAs was effective in maintaining or obtaining the authorisations to export fisheries products to the EU in certain partner third countries (Gabon, Kiribati, Madagascar, Senegal, and Seychelles), and contributed to progressing this objective in other partner third countries (e.g. Guinea Bissau with the construction and equipment of a testing laboratory). The utilisation of the EU financial contribution for sectoral support in the development and upgrading of landing sites (Cabo Verde, Côte d'Ivoire, The Gambia, Morocco, Mauritania, Morocco, Senegal and Seychelles) improved access of fisheries products to the markets, including international markets. A recent econometric study¹²² verified the positive impacts of SFPAs on trade, with a positive correlation detected between the intensity of fisheries export trade by partner third countries and the existence of an SFPA with an active Protocol. According to the study, the positive impact on trade was a result of funding provided by the SFPAs for the development of the fishing sector, such as modernisation / development of infrastructure, rather than an effect of EU catch landed locally.

The implementation of the access component of SFPAs also aimed at responding to a major concern expressed by EU operators consulted in the frame of this evaluation, namely a perceived lack of playing field for EU and foreign fishing fleets supplying the EU market for fisheries products. The SFPAs' contribution in this respect was the introduction in SFPAs of the non-discrimination clause aimed at aligning access conditions imposed on non-EU operators with conditions applicable to the EU fleet authorised to access the waters of the third countries in the framework of SFPAs.

In summary, SFPAs coherently supported the implementation of the EU international ocean governance agenda and of the farm to fork strategy by promoting sustainable exploitation of commercial stocks. However, SFPAs were less successful in contributing to the objectives

¹²² Hammarlund, C., Andersson, A. (2019) What's in it for Africa? European Union fishing access agreements and fishery exports from developing countries. *World Development* 113, 172-185

of these policies in relation to the protection of the marine ecosystems and the accession of partner third countries to international standards governing training and working conditions in the fisheries sector. There was no incoherence detected between EU interventions in the framework of SFPAs and EU interventions for development. However, coherence could be better ensured by strengthening EU internal mechanisms for coordination, and alignment of methods for implementation of budget support. SFPAs also coherently supported the EU trade agenda in the context of certain third countries through interventions under the sectoral support component aimed at facilitating trade. The framework of SFPAs provided a relevant tool to contribute to the establishment of a level playing field for EU and foreign fishing fleets supplying the EU market for fishing activities falling under the scope of the SFPAs through the expected application of the non-discrimination clause.

5.5 EU added-value: the value resulting from the EU intervention through SFPAs

5.5.1 What was the added value resulting from intervention through SFPAs compared to what could have been achieved by other means by EU Member States and partner third countries?

According to Article 38 of the Treaty on the Functioning of the EU, negotiation and implementation of public access agreements are an exclusive competence of the EU. In the absence of EU interventions in this respect, the only alternative available for access to the waters for the EU operators is the negotiation of direct authorisations with the authorities of the third countries under the framework defined in the SMEFF Regulation (EU) 2017/2403. Concerning the needs of the developing third countries for the implementation of a sustainable fisheries policy and of economic and social development of their fishing sectors, they may be addressed separately through specific development programmes implemented by the EU, the EU Member States, or any other partner for the development.

Compared to other types of interventions, the added-value of the EU involvement in SFPAs can be summarised as follows:

- SFPAs are transparent instruments published in the Official Journal of the EU and on a dedicated website of DG MARE.
- SFPAs include binding provisions for the parties involved (EU, partner third country, EU operators and EU Member States) applicable over a multi-annual period, with positive outcomes in terms of legal security and predictability.
- The SFPAs create *fora* for bilateral discussions between the partner third countries and the EU to ensure that the objectives of the CFP are promoted both nationally and regionally. In the case of multispecies SFPAs, the *fora* included dedicated joint scientific committees in charge of the provision of independent scientific advice to inform the implementation of the SFPAs.
- Under the sectoral support component of the agreement, the EU can make available specific funding to support the implementation of the sectoral policy of the partner third countries in coherence with other EU interventions. Part of these funds have enabled the partner third countries to increase scientific research and take positive steps towards strengthening their capacities in the fight against IUU fishing. Another part of these funds was used to support national priorities contributing to the strengthening of the national fisheries governance framework, and to support the economic and social development of the fisheries sector.
- The SFPAs require the joint monitoring by the parties of the activities of vessels flying the flag of a Member State when operating in the fishing zone of the partner third countries, with a competence for the EU through the SMEFF Regulation (EU) 2017/2403 to implement ex-ante and ex-post controls on the EU fishing vessels

benefiting from a fishing authorisation to access the waters of the partner third countries (a role of a 'super' flag State). These instruments ensure that the vessels comply with the provisions negotiated for access. This reinforces the EU's credibility in its efforts to promote responsible fishing practices and fight against IUU fishing.

- The EU's involvement in the negotiations ensures that the conditions for access of vessels to the waters of the partner third countries are fair and non-discriminatory.
- Finally, through its involvement, the EU can ensure that the access conditions and measures adopted under an SFPA are consistent with those applied under the SFPAs concluded other third countries.

Feedback from the EU operators consulted during the evaluation confirmed a strong preference for accessing the waters of third countries within the framework of SFPAs compared to direct authorisation regimes which do not offer the same level of legal security and predictability. There was also a strong majority of respondents to the public consultation (86%, 20 out of 23) agreeing that SFPAs are more likely to achieve positive results compared to direct access arrangements negotiated by EU operators.

In summary, the EU intervention through SFPAs resulted in added-value compared to what could have been achieved through other means. SFPAs create a robust multiannual legal framework governing the activities of EU vessels in the waters of partner third countries, with a dedicated financial instrument to implement a partnership between the EU and the third countries to support the implementation of a sustainable fisheries policy and to foster the economic and social development of their fishing sectors.

5.6 Acceptability: the perception of interventions under SFPAs by the targeted stakeholders and/or by the general public

5.6.1 To what extent stakeholders in the EU and in the partner countries accepted the EU intervention through SFPAs?

Feedback received from stakeholders in the partner third countries was not necessarily positive about SFPAs. Some comments revealed an image of an EU fleet contributing to the overexploitation of fisheries resources in national waters, with a low interaction with and benefit to the local economy, particularly in terms of job creation and supply of fish for the local population. While the transparency of the SFPA framework was acknowledged as positive and being an example of international good practice promoted by the EU, feedback suggested that more could be done in terms of transparency over the implementation of the access component, with the timely sharing of information on the number of EU fishing vessels having accessed the waters, and the catch obtained in these waters.

The sectoral support of SFPAs attracted fewer comments. A reason raised by stakeholders in the EU and in the partner third countries for this was that there is low public awareness about the sectoral support programmes and their achievements. There was a fairly strong consensus, if not unanimity, among the different categories of stakeholders consulted during the evaluation (EU Member States, private sector in the EU and in the third countries, multilateral and bilateral donors, NGOs) for improved transparency about the implementation and results of the sectoral support component of SFPAs. A majority of respondents to the public consultation (80%, 13 out of 15) were also of the opinion that there is not sufficient public information on the activities implemented under the sectoral support component of SFPAs. The lack of awareness about the sectoral support component prevented its consideration in the public perception of SFPAs which remains, as a result, largely focused on the more visible access component.

Information shown in Table 25 page 69 confirms that until now, public information on the utilisation of the EU contribution for sectoral support has been limited to: i) information on

the amount of the EU financial contribution and its implementation principles (e.g. priorities, principles governing programming and payments) as established in the context-specific provisions in the Protocols; ii) registration of EU contributions in the Finance regulations of the partner third countries; and iii) findings of the independent ex-post evaluations generally published on an EU website around or after the date of expiration of the Protocol subject to the evaluation. Other documents such as the annual and multiannual programmes, the sectoral support implementation guidelines, the annual or final implementation reports submitted by partner third countries, and the rationale underpinning the decisions on payments of tranches by the Joint Committees are part of the minutes of the Joint Committees which are not public. Concerning the sectoral support guidelines, there was an exception in the case of Mauritania with the implementation rules of the sectoral support included as an annex to the Protocol 2015-2021, which gave them a binding force for the two parties.

In view of the benefits of communication of the achievements of the sectoral support programmes in the partner third countries to raise the awareness and acceptability of SFPAs by civil society, the implementing guidelines adopted by the Joint Committees included provisions for the partner third countries to design and to implement communication plans supporting the visibility of the activities under the sectoral support. The review developed in section 4.2.7 of this report establishes that different types of communication activities were indeed implemented, such as *inter alia* inauguration ceremonies, press articles, media releases, commemorative plaques, organisation of presentation workshops and dedicated websites. However, feedback from Fisheries Attachés suggested that communication about the activities implemented under the sectoral support programme was generally below expectations. A review of the minutes of the different Joint Committees confirmed that in most cases there was a regular need for the EU party to remind the partner third countries of the communication objectives.

Feedback from the targeted consultation could not help to explain the perceived difficulties of the partner third countries to communicate. Some of the reasons frequently mentioned in the past, such as the lack of funds for communication or the absence of communication guidelines, are now mitigated through the Joint Committees under most of the Protocols which have been renewed recently (e.g. communication budget provided in the multi-annual programme implemented within the framework of the SFPAs concluded with e.g. Cabo Verde, Cook Islands, Côte d'Ivoire, Mauritania, Senegal, adoption by the Joint Committees of implementing guidelines detailing communication requirements and/or communication plans). The extent to which these recent initiatives were effective in improving public awareness about the activities funded through the EU contribution for sectoral support in the partner countries needs to be evaluated. However, having a budget to implement a communication plan in the multi-annual programmes probably improved the accountability of the partner third countries in this respect.

In summary, until now, public perception about SFPAs has remained largely focused on their access component, with mixed levels of acceptability by the civil society in the partner third countries. The positive contribution of the EU interventions under the sectoral support component of SFPAs is largely unknown by civil society in the EU and in the partner third countries. Stakeholders' views are for improved transparency over the implementation of SFPAs. The need for adequate communication plans was clearly identified by the European Commission to improve public awareness about the activities funded through the EU contribution for sectoral support, with relevant measures having been introduced in the framework of certain recently negotiated Protocols.

6 Conclusions

The overall conclusion of this evaluation is that SFPAs are fit for purpose in their contribution to the objectives of: i) contributing towards resource conservation and environmental sustainability through rational and sustainable exploitation of living marine resources of the waters of the partner third countries; ii) supporting the development of a sustainable fisheries sector in the partner third countries; and iii) contributing to the continued activities of the EU fishing fleets operating in external waters, and the employment linked to these fleets. However, the evaluation of the performance of SFPAs against the different evaluation criteria (relevance, effectiveness, efficiency, EU added-value, coherence and acceptability) has showed that certain implementation modalities of SFPAs could be reviewed in the medium-term to improve performance of the instrument. The following sections review and conclude for each evaluation criteria what worked, what did not work, and the lessons learnt, and identify future needs in relation to the improvement of the performance of SFPAs.

Relevance

What is, or is not, working and the lessons learnt

The evaluation of the relevance of SFPAs concludes that SFPAs provided a relevant framework to satisfy:

- the needs and objectives of the EU Common Fisheries Policy in non-EU waters through the identification and the monitoring of access modalities for EU vessels under conditions ensuring the sustainability of their fishing operations, aligned with the standards of the Common Fisheries Policy and EU obligations stemming from relevant international instruments.
- the needs of the partner third countries in terms of: i) generating financial benefits from a surplus of their stocks and/or of their geographical position on the migration routes of highly migratory species; and ii) establishment of a partnership with dedicated funding for the strengthening of their fisheries governance framework and the sustainable development of their fishing sectors.
- the needs of the EU long-distance fleet and of certain segments of the EU artisanal fleet in terms of access to productive fishing zones in external waters, and the establishment of a level playing field for EU operators and other foreign operators.

The decoupling of the EU contribution for access and the EU contribution for sectoral support is relevant to facilitate separate financial management of the two components by the parties. However, the evaluation concludes that there has been a proportionality between the EU contribution for access and the EU contribution for sectoral support, the amount of the latter being primarily driven by EU contribution paid in exchange for the fishing opportunities obtained for the EU fleet in the waters of the third countries. Where the EU contribution for sectoral support could be regarded as small from a financial perspective, which is the case for most tuna SFPAs, this limited the relevance of the SFPAs in addressing the needs of the partner third countries for the strengthening of their fisheries governance framework and the sustainable development of their fishing sectors, in particular for Least Developed Countries and Small Island Developing States.

The evaluation also concludes that SFPAs have not been relevant instruments to meet the needs of the EU fishing sector when they are in force without an implementing Protocol. In these situations, the application of the exclusivity clause contained in SFPAs according to the provisions of the CFP Regulation (EU) 1380/2013 prevents EU vessels from accessing the waters of partner third countries during multiannual periods, while at the same time, their foreign competitors can access the fishing zones.

Future needs

SFPAs could include a mechanism to consider the development status and/or the particular vulnerabilities of the partner third countries when identifying the EU contribution for sectoral support, with due consideration of their absorption capacity. This would enhance the relevance of SFPAs in addressing the needs of the partner third countries through the dedicated partnership established by the instrument, in particular when the fishing opportunities negotiated are limited (e.g. tuna SFPAs).

The European Commission should address dormant SFPAs which have adverse effects on the deployment strategies of the EU fishing fleet and on a level playing field.

Effectiveness

Contribution of SFPAs to the environmental sustainability of exploitation in the waters of the third countries

What is, or is not, working and the lessons learnt

The approach followed within the framework of SFPAs to adapt EU fishing opportunities, including through adaptation of access rules from one Protocol to the next or during their implementation, was effective in reducing EU fishing pressure on certain key stocks in West Africa which were assessed as overexploited (e.g. small pelagic species, cephalopods). The approach produced positive results for some stocks now being exploited within sustainable limits, but was not always effective in ensuring the recovery of those stocks where the management framework implemented by the partner third countries was not adequate to prevent increased fishing pressure by national or other foreign fleets. The reasons for this may be a lack of effectiveness of the national fisheries policy and/or an inadequate application of the non-discrimination clause and of its supporting transparency clause included in all SFPAs. The review of the implementation of SFPAs over the past few years showed that the transparency clause was generally poorly complied with by the partner third countries, and probably as a result, the review of the application of the non-discrimination clause hardly addressed in the framework of the Joint Committees. It was noted in this respect that SFPAs have not included provisions for progressive and proportionate responses in case of non-compliance with these two key governing principles.

In the case of tuna SFPAs, SFPAs were effective in ensuring that conservation and management measures adopted within the multilateral framework of RFMOs were also applied in the waters of the partner third countries, including for mitigation of the impacts of fishing on the broader environment. In some cases, SFPAs implemented ecosystem protection measures that were more stringent than the measures mandated by RFMOs, with a potential leverage effect on other fleets as a result of the expected application of the non-discrimination clause.

Future needs

In view of the importance given by the UNCLOS and by the CFP to limiting access to a surplus in the framework of multispecies SFPAs, additional efforts should be taken by the EU, the partner third countries and the broader scientific community to identify the surplus in quantitative terms. This would ensure better alignment with this key international principle governing access arrangements, in addition to helping the partner third countries regulate access by foreign fleets to the resources in their waters. Attempts to assess the surplus have been hindered by insufficient scientific information and the absence of an established multilateral cooperation framework for the conservation and the management of shared stocks in West Africa.

To address the fact that SFPAs have not been effective in implementing an ecosystem approach to fisheries management although it is an objective of the CFP shared with other relevant EU policies (see the evaluation of coherence), identification of ecosystem measures should be given a high priority in the medium term, with provision of adequate resources to implement the supporting research activities required.

The non-discrimination clause and the transparency clause are essential elements of SFPAs. The review of the application of these two clauses should become a regular item on the agenda of the Joint Committees. To the extent possible, SFPAs may consider provisions allowing progressive and proportionate responses in case of non-compliance with these two key governing principles.

Contribution of SFPAs to the strengthening of the capacities of the partner third countries and to their social and economic development

The access component

What is, or is not, working and the lessons learnt

The evaluation of the effectiveness of SFPAs concludes that the access component contributed to the strengthening of the capacities of the partner third countries and to their social and economic development. The main benefits of SFPAs within the framework of the access component of SFPAs were the identification of measures for the joint monitoring of EU vessels operating in the framework of SFPAs (vessels monitoring systems, electronic reporting systems, observer coverage) with a potential leverage effect on other fleets by virtue of the non-discrimination clause. SFPAs also contributed to creating a framework for social and economic interactions between the EU fishing fleet and the fisheries sector of the partner third countries through specific provisions in relation to the employment of nationals under conditions aligned with international standards and the landings of fisheries products in the partner third countries as appropriate. However, the benefits derived from these interactions were captured by the partner third countries offering an enabling environment, such as availability of adequate port infrastructure and port services, industries with the capacity to process raw material landed by EU vessels under conditions aligned with EU standards for the protection of consumers, and preferential access to the EU market for originating products. Such mandatory provisions were introduced when adequate conditions were there to foster their implementation.

The evaluation concludes that SFPAs provisions in relation to exchanges of electronic information for the monitoring of the EU vessels (vessels monitoring systems, electronic reporting systems) were not fully consistent across the Protocols.

Future needs

SFPAs should continue to consider provisions to foster interactions between the EU fleet and the fisheries sector in the partner third countries. Such provisions may not be relevant where the partner third countries do not provide enabling conditions for their implementation, noting that the sectoral support component is a relevant tool to contribute to the improvement of the business climate in view of increased interactions in the framework of future Protocols.

The social clause included in the SFPAs contributed to ensuring decent working conditions for nationals of third countries employed onboard EU vessels. The international standards governing working conditions in the fishing sector were upgraded with the recent (2017) entry into force of the Convention 188 of the International Labour Organisation. According to the EU social partners, the social clause of SFPAs should be adapted to reflect these international standards, and to provide an adequate framework to monitor their application over time.

For new Protocols and in a view to reinforce the consistency of provisions in relation to exchanges of electronic information for the monitoring of the EU vessels (vessels monitoring systems, electronic reporting systems) across the Protocols, the parties should apply a common harmonised template listing standard provisions for data exchanges, but without prejudice to specificities mandated by relevant RFMOs or by the legislation of the partner third countries.

The sectoral support component

The evaluation of the effectiveness of the EU interventions under the sectoral support component of SFPAs noted clear positive contributions of the utilisation of the EU contribution for sectoral support to enhance the capacities of almost all partner third countries to monitor and control fishing activities falling under their responsibilities. These made a positive contribution to the global fight against IUU fishing. There was also clear contributions of SFPAs to support the development of the scientific capacities of the partner third countries, and to contribute to the social and economic development of the fisheries sector in the partner countries. There are success stories such as *inter alia* the strengthening of the capacities of Fisheries Monitoring Centres in the partner third countries, evidence of utilisation of the results of certain research activities to inform fisheries management, and development / upgrading of landing and processing facilities to improve working conditions and access to the markets, in particular for artisanal communities. For many activities implemented within the framework of the sectoral support programmes, there is no information available about their outcomes or impacts due to insufficient relevant documentation or detailed feedback from the targeted consultation. The difficulties in assessing the effectiveness of the sectoral support have previously been raised in other studies commissioned by DG MARE¹²³ and DG INTPA¹²⁴.

The difficulties to assess the outcomes and impacts on the different activities implemented under the sectoral support component may be attributable to different factors:

- The design of the multiannual programmes, which in most cases was a list of activities to be implemented over time, without specification of operational or technical targets. The monitoring of the different activities was further hindered in some cases by their high numbers compared to budgets available and by modifications not always agreed upon *a priori* by the Joint Committees.
- The late, or lack of, detailed informative written reports submitted by certain partner third countries on the results of the implementation of the sectoral support component.
- No details provided in the minutes of the Joint Committees on the rationale followed by the two parties to assess the extent to which the different technical and operational results obtained through the implementation of the different activities programmed were aligned with expectations. This was probably because of the two points above.

As a result of the difficulty in following multiannual progress towards results, the Joint Committees relied on financial utilisation of the EU contribution as the indicator of performance of the sectoral support programme, rather than considering the actual outcomes. The minutes of the Joint Committees provide clear evidence of this.

Future needs

¹²³ See Assessment of the existing EU policy tools in the field of Sustainable Development Goal (SDG) 14 and other ocean-related agenda 2030 targets. External report for the European Commission (2021)

¹²⁴ See for example External evaluation of EU's Policy Coherence for Development (2009-2016). Evaluation carried out on behalf of the European Commission (2018)

Future EU interventions under the sectoral support component of SFPAs should better ensure that specific results are achieved with support of the EU contribution, with less reliance on financial utilisation of the EU contribution to assess progress over time. This would entail the identification by the two parties of a selection of a limited number of objectively verifiable results-based performance indicators, with identification of activities designed to support progress in achieving these key performance indicators over the periods covered by the multiannual periods of implementation of the Protocols. Payments could be based on progress towards these key technical performance indicators achieved over time, rather than on the activities and on the financial resources utilised.

There is a need to ensure that the results of the utilisation of the EU contribution for sectoral support are adequately documented by the partner third countries. An option could be to introduce into SFPAs a provision requesting the partner third countries to submit to the Joint Committee a formal instalment payment request accompanied by the documentation needed for review. Validation of the payment requests would be a condition for payments of the tranches of the EU financial contribution for sectoral support.

These two adaptations would support a convergence between the methodologies used by DG MARE and the methodologies used by DG INTPA and DG NEAR for implementation of budget support, which was raised by certain EU Delegations as an issue possibly affecting the coherence between the two interventions (see evaluation of coherence).

Contribution of SFPAs to the continued presence of the EU fishing fleet in external fleet

What is, or is not, working and the lessons learnt

The evaluation concludes that the effectiveness of SFPAs to support the continued presence of the EU fishing fleet in external waters was positive. SFPAs were successful in supporting the deployment of certain segments of the EU fishing fleet in the waters of partner third countries (long-distance fleet, artisanal fleet as appropriate), with a positive contribution to the profitability of the operations and on the employment linked to these fleets.

Future needs

The future needs are to maintain the existing network of SFPAs, and to expand it to the extent possible to include the waters of certain third countries in which EU fishing vessels seek access to strengthen their deployment strategies. As mentioned in the evaluation of the relevance of the instrument, solutions should be identified to avoid the negative impacts of SFPAs without an implementing Protocol in force.

Efficiency

What is, or is not, working and the lessons learnt

The extent to which the fishing opportunities negotiated were commensurate with the interests of the EU fleet since 2015 was variable when considering the rate of utilisation of these fishing opportunities by EU vessels. The evaluation notes that there has been a continuous effort since the early 2000s to adapt the fishing opportunities from one Protocol to the next taking into account the utilisation of fishing opportunities available, along with other factors such as the conservation objectives. In the case of multispecies SFPAs, there is less evidence of adaptation of underused fishing opportunities from one Protocol to the next, except in the case of fishing opportunities for small pelagic species in Mauritania which were halved between 2006 and 2015. During the implementation of the Protocols, provisions for adaptation of the EU financial contribution where a reduced level of exploitation of fishing opportunities is established has never been triggered, probably

because they lacked proportionality¹²⁵. Not all Protocols included provisions for an adaptation of the financial contribution when new conservation and management measures implemented by the partner third countries impact the operational ability of the EU fishing fleet to exploit these fishing opportunities. The lack of a relevant clause raised problems in certain situations. Furthermore, the adaptation of the financial contribution for events affecting one or several fishing categories proved to be challenging to implement in the context of multispecies SFPAs, as the EU contribution was a global financial package covering all fishing categories.

The access component of SFPAs leveraged a positive cost-benefit ratio for the EU investment. As shown in Figure 10 page 50, the cost-benefit ratio was generally higher for tuna SFPAs than for multispecies SFPAs suggesting in the former case, better adjustment of the access costs to the value of species exploited and better performance in terms of utilisation of the fishing opportunities negotiated.

The performance of the partner third countries in meeting the conditions for payments of the EU contribution for sectoral support during the time periods covered by the Protocols was generally satisfactory, suggesting a fair alignment of the EU contribution for sectoral support with the absorption capacity of the partner third countries in most cases. When this was not the case, SFPAs considered an adaptation of the EU contribution for sectoral support from one Protocol to the next, or specific provisions to ensure utilisation of the EU contribution identified under a previous Protocol before releasing the EU contribution identified under the ongoing Protocol. However, provisions were not successful in ensuring a full technical implementation of the multiannual programmes agreed within the periods covered by the Protocols. This could be attributed to the rather flexible conditions of SFPAs until recently for decommitments in case of delayed technical implementation, resulting in certain activities already paid for being expected to be implemented after the expiry of the Protocols, with uncertainty over the legal framework governing the monitoring of the activities already paid for. Certain recently negotiated Protocols have included more prescriptive time-limits for eligibility of payments after the expiry of the Protocols which may incentivise an improved adherence of the partner third countries to the calendars agreed.

The legal competence of the EU party to exercise controls over the utilisation of the EU contribution for sectoral support appears to be limited. Some levels of controls were possible where proof of expenses were identified as a source of verification of the activities implemented. However, this was not always the case, with seemingly unclear internal rules of the European Commission in relation to verifications of expenses reported by the partner third countries. In certain situations, the review of expenditures was externalised to an independent third party. Arguably, a recourse to external reviews probably increased the confidence of both parties in the findings, and left more time to the two parties to concentrate exchanges on technical achievements.

Future needs

Concerning the balance between fishing opportunities available and their utilisation, the European Commission should continue to endeavour to align the fishing opportunities with their utilisation, in particular where there is sufficient hindsight to establish that fishing opportunities negotiated for certain fishing categories were clearly in excess of the needs. All SFPAs should, to the extent possible, include proportioned provisions for adaptation of the EU financial contribution for access during the implementation of the Protocols where a reduced level of exploitation of fishing opportunities is established, or where measures not foreseen during the negotiation of the Protocols impact the operational ability of the EU fleet to exploit the fishing opportunities available.

¹²⁵ The only relevant provision was a termination of the SFPAs or of its implementing Protocol

Concerning the payments of the EU contribution for sectoral support, consideration should be given to an adaptation of the current rules to incentivise as much as possible the partner third countries to implement the multiannual programmes agreed within the periods covered by the relevant Protocols. Such adaptations could include time-limits for the partner third countries to utilise funding available.

Concerning verification of expenses reported by the partner third countries, consideration should be given to including provisions in the SFPAs to ensure the legal competence of the EU in cases where this is needed. The approaches to verification of expenses implemented by the European Commission could be harmonised. A complementary option could be to externalise financial reviews of expenditures reported, which would leave more time for the two parties to concentrate on technical achievements.

Coherence

Internal coherence

What is, or is not, working and the lessons learnt

The evaluation of the coherence between SFPAs and other interventions implemented by the EU in the framework of the Common Fisheries Policy concludes that the interventions implemented under the SFPAs coherently supported the EU activities in the relevant international fisheries organisations and EU global efforts to combat IUU fishing. However, the bilateral frameworks of SFPAs were not sufficiently used to foster compliance of partner third countries with international obligations in certain contexts. The evaluation also identified that SFPAs were not sufficiently used to contribute to the strengthening of the international management framework, but the Protocol recently concluded with Seychelles demonstrates that the approach is changing. Concerning the global fight against IUU fishing, SFPAs contributed to this global priority through the strengthening of the capacities of the partner third countries, and contributed to strengthening the zero-tolerance approach promoted by the Commission by refraining from negotiating with third countries which have not tackled the shortcomings notified to them under the IUU pre-notification procedure.

Future needs

The application of the non-discrimination clause is pivotal to ensure the supporting role of SFPAs for conservation and management of shared stocks. Increased focus of the sectoral support programmes on improved compliance of partner third countries with their international obligations in certain contexts would enhance the contribution of SFPAs to the implementation of international conservation and management measures by the partner third countries. Until now, the role of SFPAs in promoting bilateral dialogue on matters of relevance for the international management framework of shared stocks was not defined. However, the Protocol recently concluded with Seychelles in 2020 shows that the approach is changing, and a similar approach should be extended to other contexts.

Concerning the EU global fight against IUU fishing, the synergies between SFPAs and the IUU Regulation (EU) 1005/2008 could be further strengthened by considering a provision encouraging the partner third countries to refrain from granting fishing authorisations to fishing vessels flying the flag of a third country identified by the EU as non-cooperating.

External coherence

What is, or is not, working and the lessons learnt

SFPAs coherently supported the implementation of the EU's international ocean governance agenda and its Farm to Fork strategy, by promoting sustainable exploitation of commercial

stocks. However, SFPAs were less successful in contributing to the objectives of these policies in relation to the preservation of marine ecosystems and the promotion of international standards governing training and working conditions in the fisheries sector. Furthermore, until the end of 2020, SFPAs included very few interventions in sectors of the blue economy outside the traditional fisheries and aquaculture sectors.

There were no issues of coherence between EU interventions within the framework of SFPAs and EU interventions for development. During the implementation of the programmes, coherence was reported to be ensured in a satisfactory manner through regular ad-hoc consultations between DG MARE, Fisheries Attachés and EUD staff involved in the monitoring of the sectoral support as appropriate. However, coherence could be better ensured by strengthened EU internal mechanisms for coordination, and alignment of methods for implementation of budget support. SFPAs also coherently supported the EU trade agenda in the context of certain third countries through interventions under the sectoral support component aimed at facilitating trade, with positive effects on the levels of exports from the partner third countries. The framework of SFPAs provided a relevant tool to contribute to the establishment of a level playing field for EU and foreign fishing fleets supplying the EU market for fishing activities falling under the scope of the SFPAs, through the expected application of the non-discrimination clause.

Future needs

SFPAs will need to strengthen their interventions in support of an ecosystem approach to fisheries management to improve their support to relevant EU overarching policies (International Ocean Governance, Farm to Fork strategy, and Biodiversity strategy). The role of the political dialogue within SFPAs in promoting accession of partner third countries to the international instruments governing training and working standards in the fisheries sector should also be enhanced to improve the support of the instrument to the delivery of the International Ocean Governance agenda and the Farm to Fork strategy in contexts falling under the scope of SFPAs.

Depending on the value of the EU contribution for sectoral support and the needs of the partner third countries, SFPAs could also endeavour to support the partner third countries in advancing and diversifying their sustainable, inclusive and equitable blue economies in sectors other than fisheries and aquaculture¹²⁶. This may be especially relevant for Small Island Developing States. However, it is noted that SFPAs are an instrument implementing the Common Fisheries Policy in external waters, and as such, are expected to focus on measures falling under the scope of the Policy¹²⁷.

The coordination between interventions deployed within the framework of SFPAs and the interventions deployed under the EU cooperation initiatives worked well as evidenced by the complementarities and synergies achieved. However, the quality of the interactions between the different entities involved depends to some extent on the level of engagement of the EU staff involved. In the future, the coordination between the services of the different Directorates General involved and the European External Action Service could be better secured by the joint adoption of guidelines framing the principles and *modus operandi* of the inter-service cooperation on matters of relevance for SFPAs.

¹²⁶ According to the EU Blue Economy report (2021), blue economy activities include i) established sectors: marine living resources (i.e. fisheries and aquaculture), marine non-living resources, marine renewable energy, ports activities, shipbuilding and repair, maritime transport, coastal tourism, and ii) emerging sectors: ocean energy, blue bioeconomy and biotechnology, desalination, marine minerals, maritime defence, research and maritime works (submarine cables, robotics)

¹²⁷ primarily conservation of marine biological resources and the management of fisheries and fleets exploiting such resources – Article 1 of the CFP Regulation (EU) 1380/2013

As far as implementation modalities of the different interventions are concerned, improvements in alignment would be desirable to further ensure consistency, and to avoid creating confusion for the authorities of the partner third countries.

Concerning the EU trade policy, there is a need to ensure that the non-discrimination clause and its supporting transparency clause are effectively applied for fishing activities falling under the scope of SFPAs to ensure a level playing field for EU operators and foreign operators supplying the EU market.

EU added-value

What is, or is not, working and the lessons learnt

The EU intervention through SFPAs resulted in added-value compared to what could have been achieved by other means. SFPAs created a robust multiannual legal framework governing the activities of EU vessels in the waters of partner third countries, with a dedicated financial instrument to implement a partnership between the EU and the third countries to support the implementation of a sustainable fisheries policy, and to foster the economic and social development of their fishing sectors.

The evaluation did not identify future needs in this respect.

Acceptability

What is, or is not, working and the lessons learnt

Public perception about SFPAs remains largely focused on their access component, with feedback received suggesting mixed levels of acceptability by the civil society in the partner third countries. The positive contributions of the EU interventions under the sectoral support component of SFPAs are largely unknown by civil society in the EU and in the partner third countries, probably as a result of insufficient efforts by the partner third countries to communicate the achievements; this despite EU requirements in this respect repeatedly echoed by the EU party during the meetings of the Joint Committees.

There is an almost unanimous request from stakeholders for improved transparency on the implementation and the outcomes of SFPAs. The need for adequate communication and visibility plans was clearly identified by the European Commission in order to improve the public awareness about the activities funded with the EU contribution for sectoral support, with relevant measures introduced within the framework of certain recently negotiated Protocols.

Future needs

Future needs include: i) improved transparency over the implementation of SFPAs to enhance public awareness about the implementation outcomes of both the access and sectoral support components of SFPAs, with likely positive effects on the accountability of the parties involved and the prevention of the diffusion of biased messages; and ii) implementation of communication and visibility plans to improve public awareness about the key achievements of SFPAs. A proportioned fraction of the EU contribution for sectoral support should be identified under all SFPAs to support the implementation of a communication plan. The document published by the European Commission on communication and visibility of EU-financed external actions in 2018¹²⁸ provides guidance in this respect, and its utilisation in the framework of SFPAs *modulo* adaptations to reflect

¹²⁸ https://ec.europa.eu/international-partnerships/system/files/communication-visibility-requirements-2018_en.pdf

the nature of SFPAs would ensure alignment with communication activities implemented under other EU initiatives affecting the partner third countries.

Improved transparency about the implementation of the SFPAs would entail the publication of some of the different documents produced or expected within the framework of SFPAs. These may include *inter alia* the minutes of the Joint Committees¹²⁹, an annual summary of the number of EU vessels authorised in the waters of the partner third countries, the access fees paid and their catch, the annual and multiannual programmes agreed by the parties to implement the EU contribution for sectoral support, and the annual reports prepared by the partner third countries on the implementation of the sectoral support. For certain categories of documents falling under the shared responsibility of the two parties, public dissemination of relevant information by the EU would require the prior consent of the partner third country. For partner third countries committed to improving the transparency of their fisheries management framework, obtaining the prior consent should not be an issue for the EU party.

Until now, the approach implemented under most SFPAs has been to develop the implementing rules for the sectoral support component as voluntary guidelines annexed to the minutes of the relevant Joint Committees. For certain SFPAs, no such guidelines were available, and for one SFPA (Mauritania 2013-2014 and 2015-2021), the rules governing implementation of the sectoral support were part of the legal provisions annexed to the Protocol. Transparency of SFPAs could be enhanced if the rules for implementation of the sectoral support were in an annex to the Protocols, hence binding for the two parties, with a positive contribution on the accountability of the two parties to external third parties.

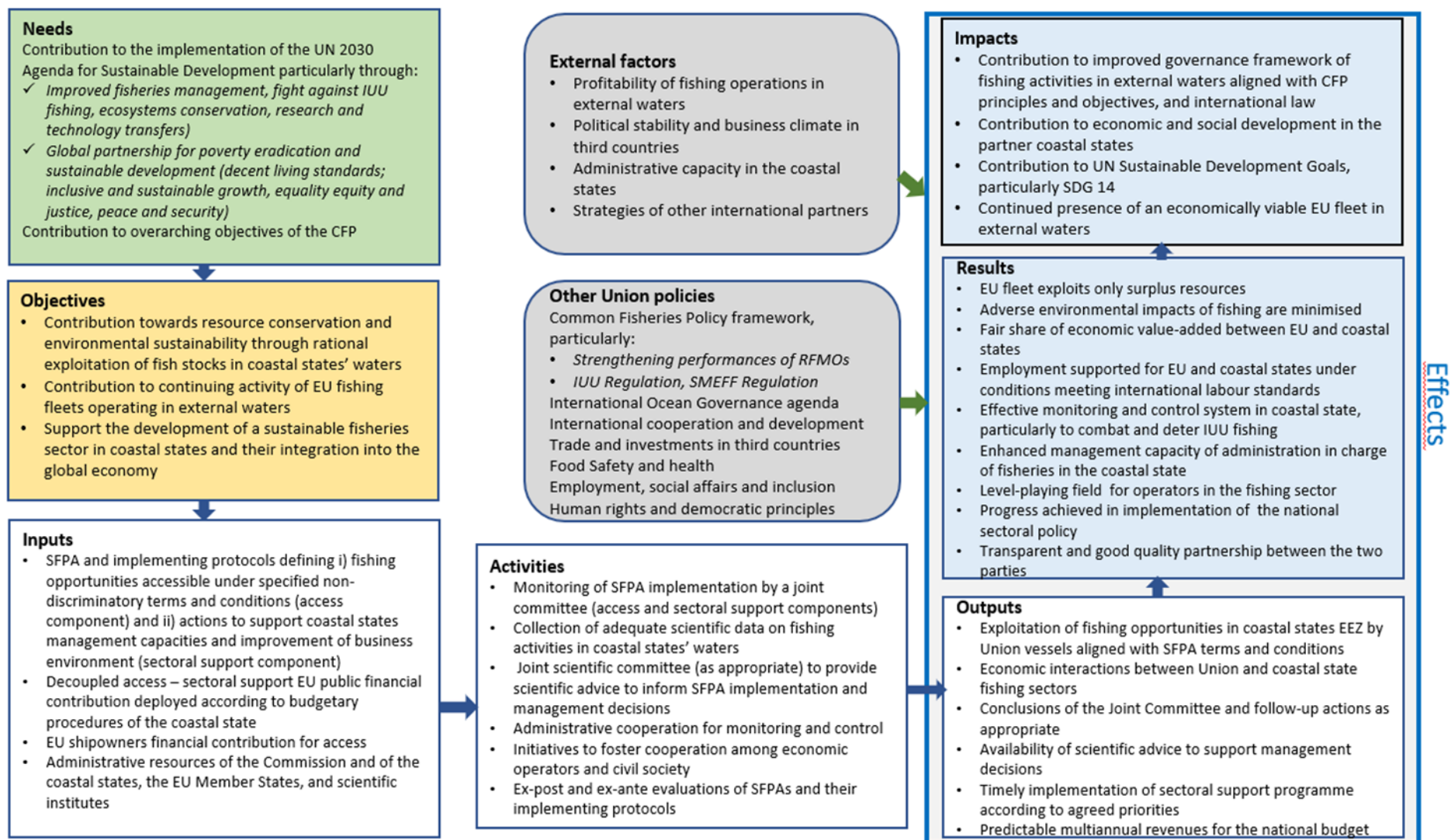
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¹²⁹ Noting that the minutes of the Joint Committees (the “Agreed records of Fisheries Consultations”) organised in the framework of the Northern agreements are published by the European Commission at https://ec.europa.eu/oceans-and-fisheries/fisheries/international-agreements/northern-agreements_en

Annex 1: Acronyms used

Acronym	Stands for:
ACP	African, Caribbean and Pacific
CECAF	Fishery Committee for the Eastern Central Atlantic
CFP	Common Fisheries Policy
EEZ	Exclusive Economic Zone
ERS	Electronic Reporting System
EU	European Union
EUD	EU Delegation
EUMOFA	European Market Observatory for fisheries and aquaculture
FMC	Fisheries Monitoring Centre
FPA	Fisheries Partnership Agreement
ICCAT	International Commission for the Conservation of Atlantic Tunas
ICES	International Council for the Exploration of the Sea
ILO	International Labour Organization
IMO	International Maritime Organization
IOTC	Indian Ocean Tuna Commission
IUU	Illegal, Unreported and Unregulated fishing
LDC	Least Developed Country
MCS	Monitoring Control and Surveillance
MSY	Maximum Sustainable Yield
NAFO	Northwest Atlantic Fisheries Organization
NGO	Non-Governmental Organisation
RFMO	Regional Fisheries Management Organisation
SDG	Sustainable Development Goal
SFPA	Sustainable Fisheries Partnership Agreement
SIDS	Small Island developing State
SMEFF	Sustainable Management of External Fishing Fleets
STECF	Scientific, Technical and Economic Committee for Fisheries
UNCLOS	United Nations Convention on the Law of the Sea
VMS	Vessel Monitoring System
WCPFC	Western & Central Pacific Fisheries Commission

Annex 2: Reconstructed intervention logic of EU interventions under SFPAs



Source: own elaboration

Annex 3: Maps showing the different SFPAs concluded between the EU and partner third countries



Figure 15: Map showing SFPAs with an active implementing Protocol in 2020 (tuna and multispecies SFPAs)

Source: DG MARE (2020) EU sustainable fisheries partnership agreements

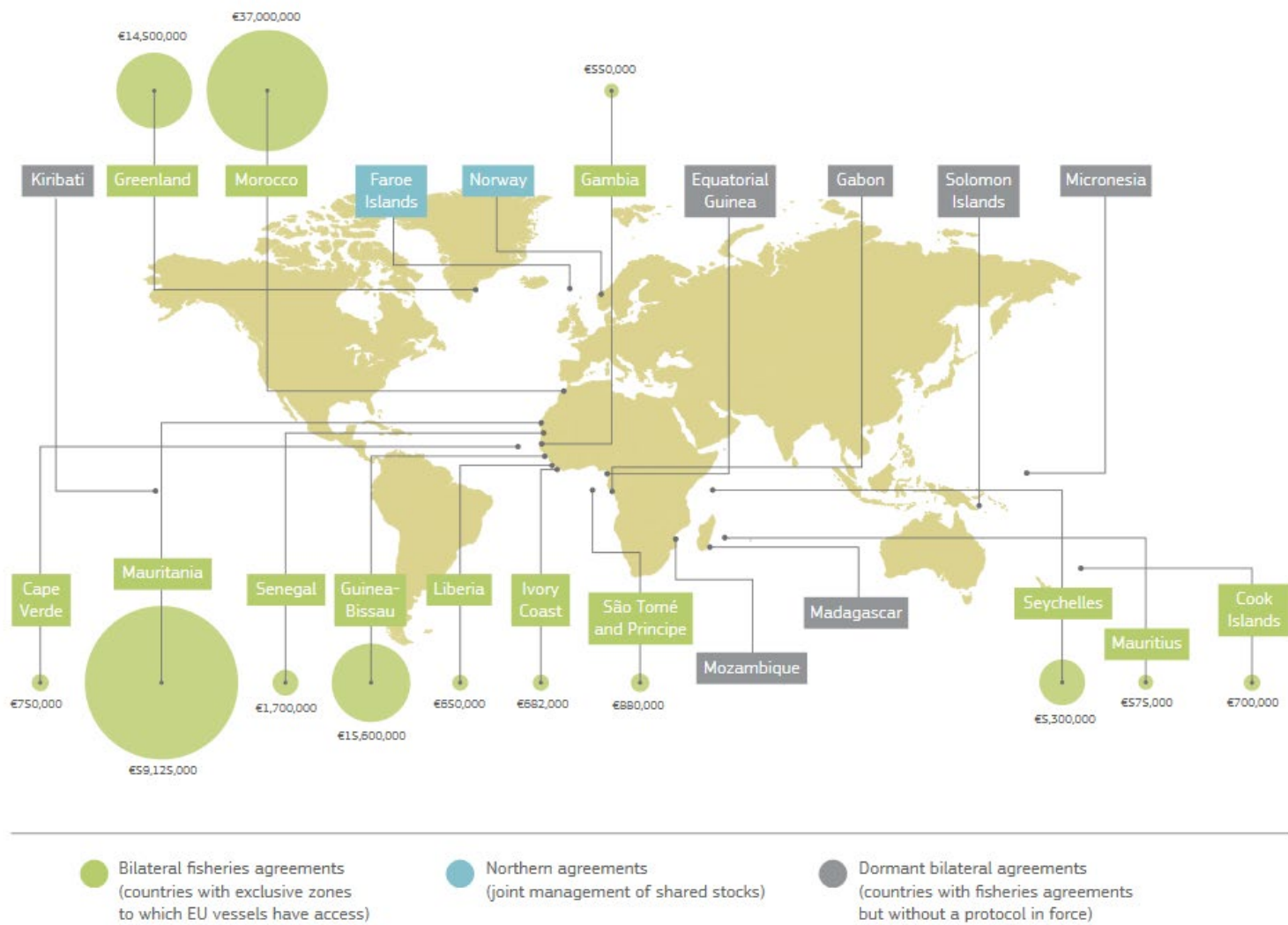


Figure 16: Map showing all SFPAs, whether active or inactive (=dormant) in 2020

Source: DG MARE (2020) EU sustainable fisheries partnership agreements

Annex 5: EU Payments to partner third countries based on the initial provisions of the Protocols

EU contribution for access

	2015	2016	2017	2018	2019	2020
Cabo Verde	275 000	250 000	250 000		400 000	400 000
Comoros	300 000	300 000				
Cook Islands		385 000	385 000	350 000	350 000	350 000
Côte d'Ivoire	422 500	422 500	422 500	330 000	330 000	275 000
Gabon	900 000					
Gambie					275 000	275 000
Greenland	15 104 203	13 168 978	13 168 978	13 168 978	13 168 978	13 168 978
Guinée Bissau	6 200 000	6 200 000			11 600 000	11 600 000
Kiribati	975 000					
Liberia	357 500	325 000	325 000	325 000	292 500	
Madagascar	866 250	866 250	866 250	866 250		
Maroc	16 000 000	16 000 000	16 000 000		19 100 000	20 000 000
Maurice	357 500	357 500	357 500	220 000	220 000	220 000
Mauritanie	55 000 000	55 000 000	57 500 000	57 500 000	57 500 000	57 500 000
São Tomé	385 000	385 000	350 000		400 000	400 000
Senegal	988 000	988 000	988 000	918 000	800 000	800 000
Seychelles	2 750 000	2 500 000	2 500 000	2 500 000	2 500 000	2 500 000
Total	100 880 953	97 148 228	93 113 228	76 178 228	106 936 478	107 488 978

Source: Protocols

Note: EU commitments are allocated in accordance with Protocols' years

EU contribution for sectoral support

	2015	2016	2017	2018	2019	2020
Cabo Verde	275 000	250 000	250 000		350 000	350 000
Comoros	300 000	300 000				
Cook Islands		350 000	350 000	350 000	350 000	350 000
Côte d'Ivoire	257 500	257 500	257 500	352 000	352 000	407 000
Gabon	450 000					
Gambie					275 000	275 000
Greenland	2 743 041	2 931 000	2 931 000	2 931 000	2 931 000	2 931 000
Guinée Bissau	3 000 000	3 000 000			4 000 000	4 000 000
Liberia	350 000					
Kiribati	325 000	325 000	325 000	292 500	292 500	
Madagascar	700 000	700 000	700 000	700 000		
Maroc	14 000 000	14 000 000	14 000 000		17 900 000	18 800 000
Maurice	302 500	302 500	302 500	355 000	355 000	355 000
Mauritania	4 125 000	4 125 000	4 125 000	4 125 000	4 125 000	4 125 000
São Tomé	325 000	325 000	325 000		440 000	440 000
Senegal	750 000	750 000	750 000	750 000	900 000	900 000
Seychelles	2 600 000	2 500 000	2 500 000	2 500 000	2 500 000	2 800 000
Total	30 503 041	30 116 000	26 816 000	12 355 500	34 770 500	35 733 000

Source: Protocols

Note: EU commitments are allocated in accordance with Protocols' years

Annex 6: Average annual first-sale prices (EUR / tonne) of the main commercial species exploited by the EU fleet in the framework of SFPAs

Fisheries / Segment	Code FAO	Scientific name	2015	2016	2017	2018	2019	2020	Source
Greenland	COD	<i>Gadus morhua</i>	2 790	2 900	3 200	3 540	3 640	3 920	7
	GHL	<i>Reinhardtius hippoglossoides</i>	5 230	4 650	4 250	4 990	3 710	4 620	7
	PRA	<i>Pandalus borealis</i>	2 950	4 510	4 430	4 370	4 770	3 870	7
	REB/REG/RED	<i>Sebastes sp.</i>	2 890	2 530	2 010	1 930	2 370	1 410	7
	Other		1 500	1 500	1 500	1 500	1 500	1 500	2
Highly migratory species									
Purse seiners	ALB	<i>Thunnus alalunga</i>	1 597	1 593	2 742	2 534	2 641	2 836	1
	YFT	<i>Thunnus albacares</i>	1 461	1 588	1 942	1 954	1 950	1 694	1
	SKJ	<i>Katsuwonus pelamis</i>	984	1 045	1 396	1 249	1 112	1 064	1
	BET	<i>Thunnus obesus</i>	972	1 071	1 463	1 309	1 177	1 099	1
	Other		1 000	1 000	1 000	1 000	1 000	1 000	2
Longliners frozen	SWO	<i>Xiphias gladius</i>	6 000	5 520	5 560	5 850	5 850	5 850	8
	BSH	<i>Prionace glauca</i>	1 320	1 300	1 410	2 340	2 380	1 610	4
	SMA	<i>Isurus oxyrinchus</i>	2 750	3 040	2 550	2 860	2 920	3 070	4
	Other		1 500	1 500	1 500	1 500	1 500	1 500	2
Longliners Fresh (La Réunion)	SWO	<i>Xiphias gladius</i>	5 000	5 000	5 000	5 000	5 000	5 000	9
	YFT	<i>Thunnus albacares</i>	5 900	5 900	5 900	5 900	5 900	5 900	9
	BET	<i>Thunnus obesus</i>	5 000	5 000	5 000	5 000	5 000	5 000	9
	ALB	<i>Thunnus alalunga</i>	5 000	5 000	5 000	5 000	5 000	5 000	9
	BUM	<i>Makaira nigricans</i>	4 900	4 900	4 900	4 900	4 900	4 900	9
	Other		3 000	3 000	3 000	3 000	3 000	3 000	2
Pole and liners	ALB	<i>Thunnus alalunga</i>	1 837	1 832	3 153	2 914	3 037	3 261	1
	YFT	<i>Thunnus albacares</i>	1 680	1 826	2 233	2 247	2 243	1 949	1
	SKJ	<i>Katsuwonus pelamis</i>	1 132	1 202	1 605	1 436	1 279	1 224	1
	BET	<i>Thunnus obesus</i>	1 118	1 232	1 682	1 505	1 354	1 264	1
	Other		1 150	1 150	1 150	1 150	1 150	1 150	2
Small pelagics (MRT/MAR + by-catches other)									
Cat1 Maroc fresh	PIL	<i>Sardina pilchardus</i>	1 800	1 370	1 830	2 180	2 430	1 810	5

Evaluation and analysis of the Sustainable Fisheries Partnership Agreements (SFPAs) between the EU and third countries including an in-depth analysis of the sectoral support component of the SFPAs

Fisheries / Segment	Code FAO	Scientific name	2015	2016	2017	2018	2019	2020	Source
	ANE	<i>Engraulis encrasicolus</i>	2 020	1 930	2 220	1 810	2 130	2 050	5
Industrial frozen	PIL	<i>Sardina pilchardus</i>	385	525	384	376	370	370	6
	HOM	<i>Trachurus trachurus</i>	1 255	980	960	950	1 000	1 000	6
	MAC	<i>Scomber scombrus</i>	1 175	1 155	1 260	1 270	1 540	1 560	6
	Other		1 000	1 000	1 000	1 000	1 000	1 000	2
Crustaceans (MRT/GNB)	DPS	<i>Parapenaeus longirostris</i>	9 300	11 340	7 390	5 700	6 600	8 000	3
	ARV	<i>Aristeus varidens</i>	19 850	24 810	16 450	14 420	15 180	15 770	3
	TGS	<i>Penaeus kerathurus</i>	19 280	17 140	16 830	22 780	22 030	21 280	3
	PAN	<i>Pandalus spp</i>	13 570	17 650	11 220	10 090	10 550	11 020	3
	GER	<i>Geryon spp</i>	7 800	6 750	6 730	9 170	8 650	8 130	3
	MNZ	<i>Lophius spp</i>	6 120	9 005	7 700	7 760	6 550	5 340	3
	Other		2 000	2 000	2 000	2 000	2 000	2 000	3
Fish and Cep.Industrial africa	HKB	<i>Merluccius polli</i>	2 050	1 690	1 720	1 440	1 610	1 890	4
	HKM	<i>Merluccius senegalensis</i>	2 050	1 690	1 720	1 440	1 610	1 890	4
	POA	<i>Brama brama</i>	2 100	2 410	2 350	2 920	1 860	2 610	4
	JOD	<i>Zeus faber</i>	9 050	9 240	9 470	10 470	11 550	9 450	4
	OCC	<i>Octopus vulgaris</i>	4 920	5 070	6 860	7 840	6 320	6 050	4
	CTC	<i>Sepia officinalis</i>	5 780	5 920	7 640	8 170	7 010	7 190	4
	BSF	<i>Aphanopus carbo</i>	3 230	3 200	3 230	3 520	3 390	3 230	4
	CKL	<i>Pseudotolithus brachygnathus</i>					2 100	1 790	4
	COB	<i>Umbrina cirrosa</i>	5 500	6 160	3 120	2 590	3 090	1 410	4
	CTC	<i>Sepia officinalis</i>	5 780	5 920	7 640	8 170	7 010	7 190	4
	DEC	<i>Dentex dentex</i>	13 750	15 060	15 490	12 640	13 450	12 260	4
	EOI	<i>Eledone cirrosa</i>	2 310	2 790	2 910	3 220	3 270	3 006	4
	EYO	<i>Erythrocles monodi</i>	1 500	1 500	1 500	1 500	1 500	1 500	2
FOR	<i>Phycis phycis</i>	3 580	4 250	4 960	4 230	3 920	3 990	4	
GAL	<i>Galeoides decadactylus</i>		4 350					4	
GFB	<i>Phycis blennoides</i>	3 320	3 640	3 910	3 640	3 470	3 740	4	

Fisheries / Segment	Code FAO	Scientific name	2015	2016	2017	2018	2019	2020	Source
	HMY	<i>Caranx rhonchus</i>	2 620	2 780	2 230	2 550	2 780	3 090	4
	MON	<i>Lophius piscatorius</i>	5 550	5 770	5 640	6 280	6 570	6 030	4
	MUT	<i>Mullus barbatus</i>	5 410	4 750	5 640	5 270	4 680	4 970	4
	PAR	<i>Pagellus bellottii</i>	1 420	1 710	1 360	1 210	1 330	1 450	4
	RKZ					1 550	1 360	1 100	4
	RPG	<i>Pagrus pagrus</i>	10 150	11 180	12 520	12 330	12 700	11 280	4
	SQE	<i>Todarodes sagittatus</i>	3 050	2 400	3 480	2 600	3 000	2 970	4
	YOE	<i>Cynoglossus senegalensis</i>				2 010	1 310	1 230	4
	Other		1 500	1 500	1 500	1 500	1 500	1 500	2
Artisanal Maroc	GBR	<i>Plectorhinchus mediterraneus</i>	3 390	3 460	3 690	3 810	3 710	3 860	4
	DEN	<i>Dentex canariensis</i>	5 900	6 730	7 730	700	7 800	6 790	4
	BRB	<i>Spondyliosoma cantharus</i>	2 190	1 930	1 780	1 960	2 140	1 990	4
	CTB	<i>Diplodus vulgaris</i>	2 300	2 510	2 680	2 600	2 580	2 520	4
	DEP	<i>Dentex gibbosus</i>	5 730	5 890	7 550	7 910	7 960	7 990	4
	PAR	<i>Pagellus bellottii</i>	1 420	1 710	1 360	1 210	1 330	1 450	4
	COE	<i>Conger conger</i>	1 980	2 100	2 150	2 250	2 260	2 000	4
	SFS	<i>Lepidopus caudatus</i>	2 840	3 480	3 610	4 990	3 700	2 960	4
	SBR	<i>Pagellus bogaraveo</i>	11 330	14 640	15 110	16 270	15 550	14 700	4
	BRF	<i>Helicolenus dactylopterus</i>	3 580	3 550	3 690	3 840	3 850	3 460	4
	DEL	<i>Dentex macrophthalmus</i>	3 840	4 500	6 180	2 870	3 100	3 350	4
	FOR	<i>Phycis phycis</i>	3 580	4 250	4 960	4 230	3 920	3 990	4
	RPG	<i>Pagrus pagrus</i>	10 150	11 180	12 520	12 330	12 700	11 280	4
	SBA	<i>Pagellus acarne</i>	2 890	2 940	3 230	3 170	3 300	3 130	4
	LHT	<i>Trichiurus lepturus</i>	2 450	2 660	2 870	2 560	3 030	2 630	4
	Other		2 500	2 500	2 500	2 500	2 500	2 500	2

Sources:

- 1- COMEXT Export of whole frozen tuna to Seychelles/ Mauritius/ Madagascar/Côte d'Ivoire/ Ghana and Senegal by species. Prices increased by 15% for pole and liners
- 2- Own assumption
- 3- Junta de Andalucía - Estadísticas Pesqueras pesqueros congelados (PAN: average all shrimps)
- 4- EUMOFA (prices in Spain and Portugal)
- 5- Junta de Andalucía IDAPES - <http://www.juntadeandalucia.es/agriculturaypesca/idapes/servlet/FrontController>
- 6- COMEXT Export of whole frozen species of small pelagics by NL and DE (2020 not available for sardines and horse mackerel)

7- EUMOFA (prices in Germany and Denmark)

8 - <https://boletinagrario.com/ap-39,precio-pezespada,36,0.html> (until 2018)

9- Professional association

Annex 7: Summary of the evolution of certain key commercial stocks exploited in the framework of SFPAs

Evolution of the exploitation status of the stocks of the main small pelagic species exploited in West Africa between 2012 and 2019

Non pleinement exploité	Le stock est dans de bonnes conditions et la pression de pêche peut être augmentée sans menacer la durabilité. Toute augmentation doit être vue dans le contexte de la situation environnementale générale					
Pleinement exploité	La pêcherie opère dans les limites de la durabilité. La pression de pêche actuelle semble durable et peut être maintenue					
Surexploité	La pêcherie est dans un état non désiré, tant en termes de biomasse que de mortalité par pêche. La pression de pêche devrait être réduite.					
Espèce ou groupe d'espèces Nom commun (<i>nom scientifique</i>)	État 2012	État 2016*	État 2017	État 2018	État 2019	Catégorie UE concernée dans la zone
Sardine (<i>Sardina pilchardus</i>) Zone C	Non pleinement exploité	Non pleinement exploité	Non pleinement exploité	Non pleinement exploité	Non pleinement exploité	Espèce cible Maroc et Mauritanie (petits pélagiques industriels)
Sardinelles <i>Sardinella aurita</i> <i>S. maderensis</i> (<i>Sardinella spp.</i>) Toute la sous-région	Surexploité	Surexploité	Surexploité	Surexploité	Surexploité	Prise accessoire (depuis 2012) Maroc et Mauritanie (petits pélagiques industriels)
Chinchard d'Europe (<i>Trachurus trachurus</i>)	Pleinement exploité	Pleinement exploité	Surexploité	Surexploité	Pleinement exploité	Espèce cible Maroc et Mauritanie (petits pélagiques industriels)
Chinchard du Cunène (<i>T. trecae</i>) Toute la sous-région	Surexploité	Surexploité	Surexploité	Surexploité	Pleinement exploité	Espèce cible Maroc et Mauritanie (petits pélagiques industriels)
Maquereau espagnol atlantique (<i>Scomber colias</i>) Toute la sous-région	Pleinement exploité	Pleinement exploité	Pleinement exploité	Pleinement exploité	Pleinement exploité	Espèce cible Maroc et Mauritanie (petits pélagiques industriels)
Anchois (<i>Engraulis encrasicolus</i>)	Pleinement exploité	Pleinement exploité	Pleinement exploité	Pleinement exploité	Pleinement exploité	Espèce cible Senneurs pélagiques au nord Maroc
Ethmalose (<i>E. fimbriata</i>) Toute la sous-région	Pleinement exploité (Mauritanie) Surexploité (Senegal)	Surexploité	Surexploité	Surexploité	Surexploité	Aucun (espèce très côtière)

Source

2012 Rapport du Groupe de travail de la FAO sur l'évaluation des petits pélagiques au large de l'Afrique nord-occidentale. Dakar, Sénégal, 21-25 mai 2012
 2016 Rapport du Groupe de travail de la FAO sur l'évaluation des petits pélagiques au large de l'Afrique nord-occidentale. Dakar, Sénégal, 23-28 mai 2016
 2017 Rapport du Groupe de travail de la FAO sur l'évaluation des petits pélagiques au large de l'Afrique nord-occidentale. Nouadhibou, Mauritanie, 22 – 27 mai 2017
 2018 Rapport du Groupe de travail de la FAO sur l'évaluation des petits pélagiques au large de l'Afrique nord-occidentale. Banjul, Gambie, 26 juin–1 juillet 2018

2019 Rapport de groupe de travail sur l'évaluation des petits pélagiques au large de l'Afrique Nord-Occidentale Casablanca, Maroc, 8-13 juillet 2019.

Evolution of the exploitation status of the stocks of the main demersal species exploited in West Africa between 2013 and 2019

Espèce ou groupe d'espèces Nom commun (<i>nom scientifique</i>)	État 2013	État 2017	État 2019	Catégorie UE concernée dans la zone
Merlus noirs (<i>Merluccius polli</i> et <i>M. senegalensis</i>) Mauritanie	Non pleinement exploité			
Merlus noirs (<i>Merluccius polli</i> et <i>M. senegalensis</i>) Maroc, Mauritanie, Sénégal, Gambie – toute la zone		Pleinement exploité	Surexploité	Espèce cible Chalutiers Maroc, Mauritanie, Sénégal et Gambie Prise accessoire petits pélagiques industriels
Mérou blanc (<i>Epinephelus aeneus</i>) Mauritanie, Sénégal, Gambie	Surexploité	Surexploité	Surexploité	Prises accessoires Mauritanie
Pagre (<i>Pagrus caeruleostictus</i>) Mauritanie, Sénégal	?	Pleinement exploité	Pleinement exploité	Prises accessoires Mauritanie
Denté <i>Dentex macrophthalmus</i> Maroc, Mauritanie et Sénégal	?	Non pleinement exploité	Non pleinement exploité	Prises accessoires Maroc, Mauritanie
Diagramme gris <i>Plectorynchus mediterraneus</i> Mauritanie, Maroc	Surexploité	Surexploité	Surexploité	
Pageot (<i>Pagellus bellottii</i>) Mauritanie, Sénégal, Gambie	Non pleinement exploité	Pleinement exploité	Pleinement exploité	Prises accessoires Maroc, Mauritanie
Besugue <i>Pagellus acarne</i> Maroc	Surexploité	Surexploité	Pleinement exploité	
Poulpe (<i>Octopus vulgaris</i>) Cap Blanc	Surexploité	Pleinement exploité	Surexploité	Prises accessoires Mauritanie
Poulpe (<i>Octopus vulgaris</i>) Sénégal / Gambie	Non pleinement exploité	?	Pleinement exploité	
Seiche (<i>Sepia</i> spp.) Cap Blanc	Non pleinement exploité	Non pleinement exploité	Non pleinement exploité	Prises accessoires Mauritanie
Calmar ou encornet commun (<i>Loligo vulgaris</i>) Cap Blanc	Non pleinement exploité	?	Non pleinement exploité	Prises accessoires Mauritanie
Crevette profonde (<i>Penaeus longirostris</i>) Mauritanie	Non pleinement exploité	Non pleinement exploité	Pleinement exploité	Espèce cible Mauritanie (chalutier crevettes)
Crevette côtière <i>Parapenaeus notialis</i> Mauritanie	Non pleinement exploité	Non pleinement exploité	Pleinement exploité	Espèce cible Mauritanie (chalutier crevettes)

Source :

2013 Rapport du Groupe de travail FAO/COPACE sur l'évaluation des ressources démersales – Sous-groupe Nord. Fuengirola, Espagne, du 18 au 27 novembre 2013. CECAF/ECAF Series/COPACE/PACE Séries. No. 15/77. Rome, FAO

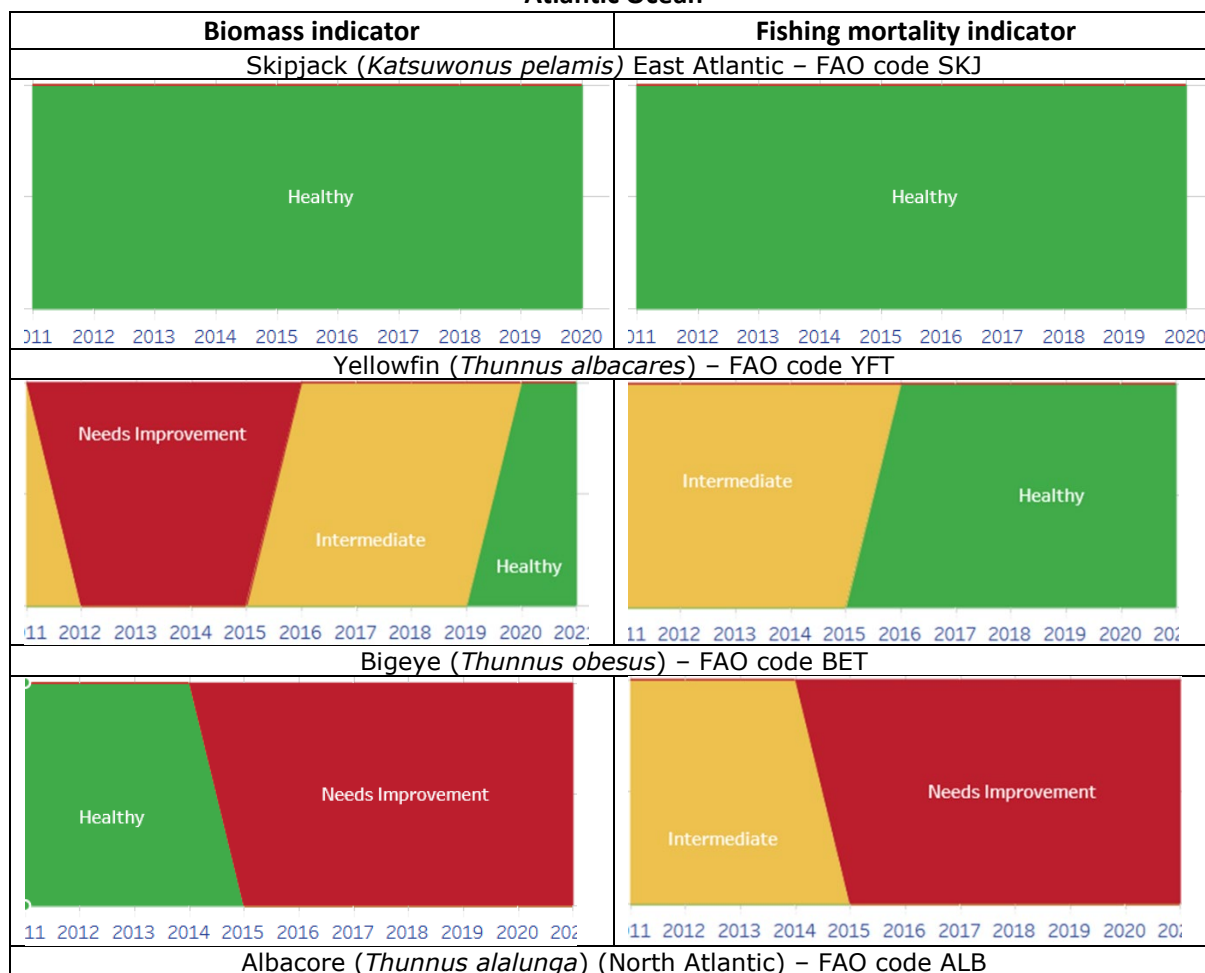
2017 Rapport du Groupe de travail FAO/COPACE sur l'évaluation des ressources démersales – Sous-groupe Nord. Tenerife, Espagne, du 6 au 15 juin 2017. CECAF/ECAF Series/COPACE/PACE Séries. No. 18/78. Rome, FAO

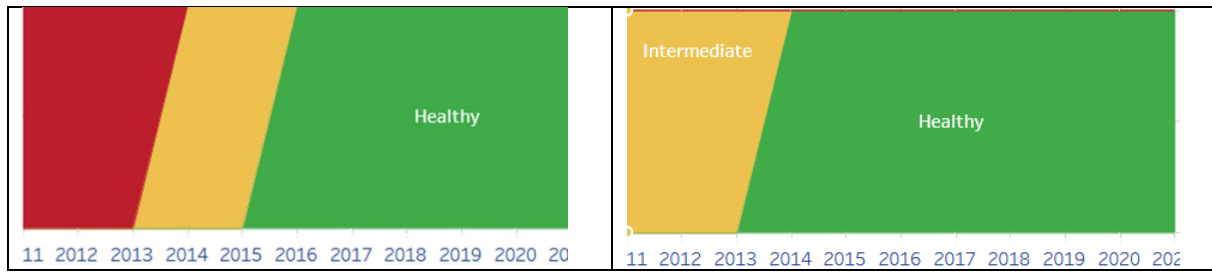
2019 : Rapport du Groupe de Travail FAO/COPACE sur l'évaluation des ressources démersales – Sous-groupe Nord. Nouakchott, Mauritanie, 2-10 décembre 2019

Evolution of the exploitation status of the stocks of the main tuna species status since 2011

	Biomass indicator	Fishing mortality indicator
Needs improvement	SSB < SSB _{MSY} but not stable or increasing	F > F _{MSY} and no adequate management measures to end overfishing
Intermediate	SSB < SSB _{MSY} but stable or increasing with stock managed at F _{MSY} level	F > F _{MSY} but adequate management measures expected to end overfishing
Healthy	SSB > SSB _{MSY}	F < F _{MSY}

Atlantic Ocean

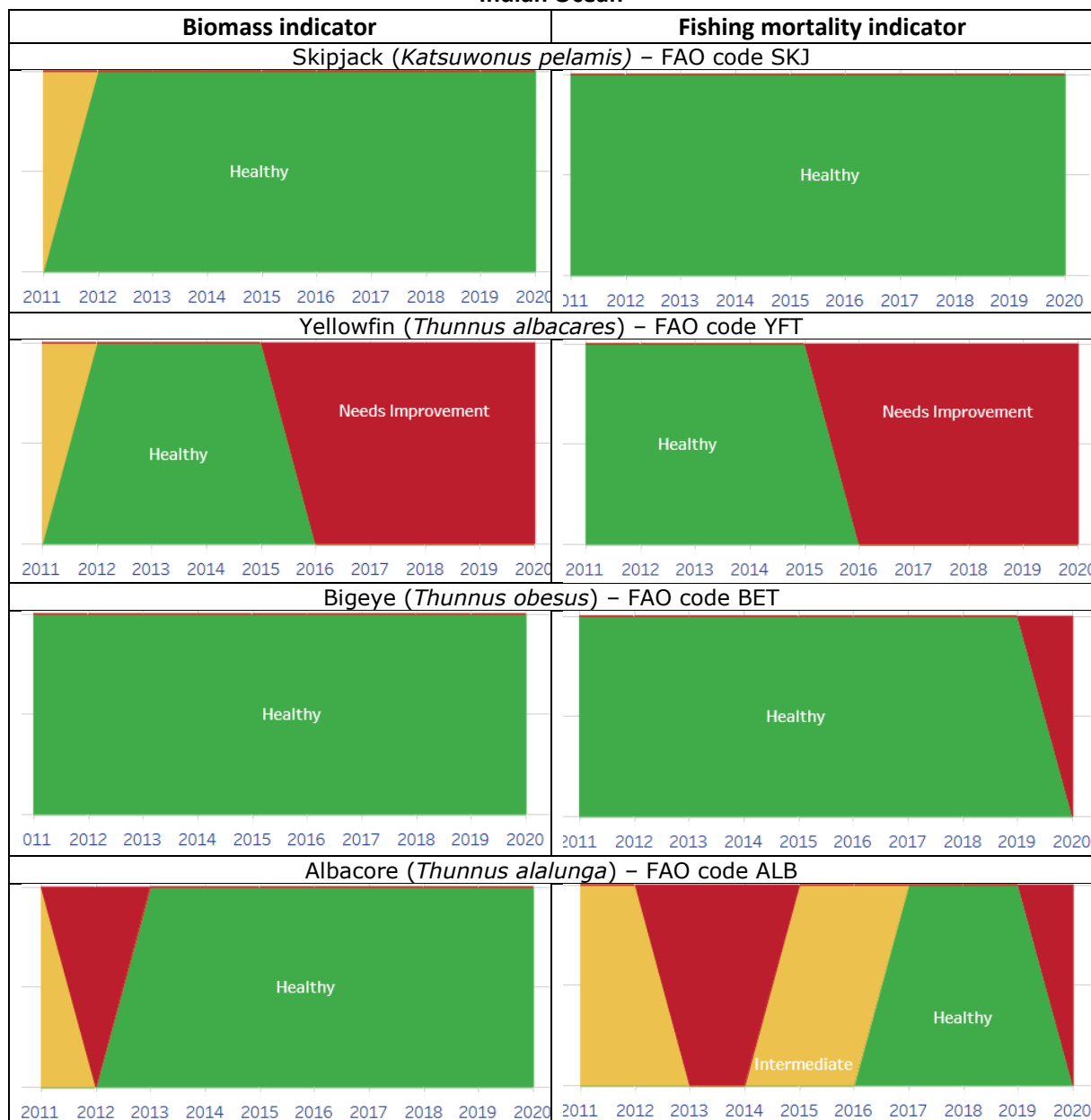




Note: situation as reported 2011-Mar. 2021

Source : *International Seafood Sustainability Foundation (ISSF)* [Tuna Stocks Tool](#)

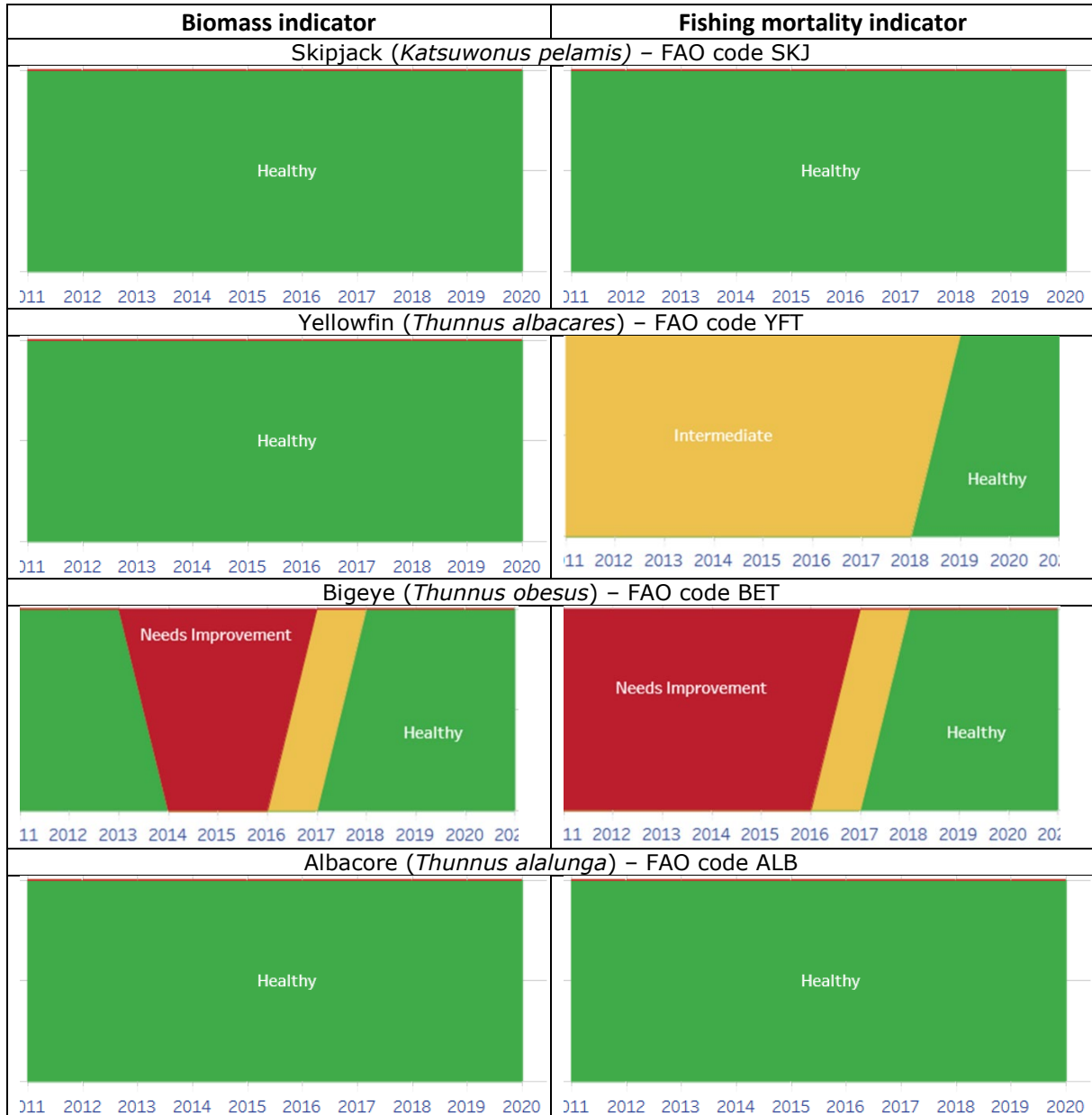
Indian Ocean



Note: situation as reported 2011-Mar. 2021

Source : International Seafood Sustainability Foundation (ISSF) [Tuna Stocks Tool](#)

Western Central Pacific Ocean



Note: situation as reported 2011-Mar. 2021

Source : International Seafood Sustainability Foundation (ISSF) [Tuna Stocks Tool](#)

Annex 8: Main provisions of selected Protocols in relation to exchange of VMS and ERS data

Protocols	VMS reporting frequency (hours)	VMS fallback measure	ERS language	ERS Instant message	ERS fallback measure
Maroc MOR1923	2	Toutes les 4 heures, 10 jours pour réparer	UN/CEFACT transmitted via FLUX provided by EU. Transition period during which data are transmitted via the Data Exchange Highway in EU-ERS (v.3.1 format)	Not specified	Not specified
Maurice MUS1721	1	Every two hours via email or radio or fax / doit être réparé sous 15 jours	Transition asap	Not specified	Not specified
Mauritania MRT1521	1	Every four hours via email or radio or fax / doit être réparé sous 5 jours	ERS shall be transmitted under DEH (Data exchange highway) in EU-ERS (v.3.1 format)	Not specified	Parties shall agree on alternative electronic mean
Guinea-Bissau GNB1924	Not defined	By email, fax or radio (fréquence?)	UN/CEFACT transmitted via FLUX provided by EU. Transition period during which data are transmitted via the Data Exchange Highway in EU-ERS (v.3.1 format)	COE / COX / PNO	Not specified
Senegal SEN1924	1 (PS) 2 all other	Toutes les 4 heures, 30 jours pour réparer	UN/CEFACT transmitted via FLUX provided by EU. Transition period during which data are transmitted via the Data Exchange Highway in EU-ERS (v.3.1 format)	COE / COX / PNO	Daily declaration by radio/email / Ten days to repair
Gambia GMB1925	2	Toutes les 4 heures, 10 jours pour réparer	UN/CEFACT FLUX	Not specified	Daily declaration by radio/email / Ten days to repair
Cabo Verde CPV1924	Not defined	Every four hours, 30 days to repair	UN/CEFACT transmitted via FLUX provided by EU. Transition period during which data are transmitted via the Data Exchange Highway in EU-ERS (v.3.1 format)	COE / COX / PNO	Daily declaration by radio/email / Ten days to repair
Côte d'Ivoire CIV1824	Not defined	Toutes les 4 heures, 10 jours pour réparer	Transition asap, les parties shall agree to determine the terms of the transition	Not specified	Not specified
São Tomé STP1924	1 (PS); 2 (LL)	30 jours pour réparer, fax / radio / email toutes les 4 heures	UN/CEFACT transmitted via FLUX provided by EU. Transition period during which data are transmitted via the Data Exchange Highway in EU-ERS (v.3.1 format)	COE / COX / PNO	Daily declaration by radio/email / Ten days to repair
Seychelles SYC2026	1	Toutes les 4 heures, 30 jours pour réparer	UN/CEFACT transmitted via FLUX provided by EU. Transition period during which data are transmitted via the Data Exchange Highway in EU-ERS (v.3.1 format)	COE / COX / PNO	Daily declaration by radio/email / Ten days to repair

Source : Protocols

Note : COE : entering the EEZ, COX: exiting the EEZ, PNO: entry in ports

Annex 9: Process / methods implemented for the review of activities implemented under the sectoral support component of SFPAs

A-Process / method followed

Each activity of the different multi-annual programmes adopted by the two parties has been reviewed for a characterisation according to three criteria: the field of intervention of the activity, the types of direct beneficiaries from the activity, and the type of expense covered by the activity.

For the fields of intervention, the following categories were selected based on our expert judgment in order to capture in a limited number of categories the different types interventions implemented:

Fields of intervention	Typical examples
Monitoring, control and surveillance	Seaborne / airborne patrols, modernisation of national Fisheries Monitoring Centres
Safety at sea	Equipment of national Maritime Rescue Coordination Centres, purchase of safety equipment for fishers (e.g. life jackets, GPS)
Research and collection of scientific data	Research campaigns, scientific data collection schemes including observations at sea
Sanitary control	Strengthening of the capacities of the competent authorities, support to inspection programmes
International cooperation	Support to the participation of partner third countries to the work of international organisations
Infrastructures	Contribution to works for port and shore infrastructures
Post-harvest	Support to improvement of post-harvest conditions (conservation of fisheries products after landing, distribution, processing)
National fisheries management measures	Support to national fisheries management schemes such as development and implementation of management plans or management of national fleets
Ecosystem protection	Support to ecosystem protection through development / strengthening of Marine Protected Areas or artificial reefs, or development of mitigating measures
Vocational training	Equipment of national maritime training centres, support to training of private operators or civil society
Aquaculture development	Measures targeting the development of the aquaculture sector (policy, research, infrastructures)
Institutional strengthening	Support to training of public officers, improved facilities and equipment for fisheries management authorities
Other	Other types of activities or unallocated funding ; activities in support of the implementation of the sectoral support programme

For the direct beneficiaries, the following categories were selected:

Types of beneficiaries	Typical examples
Managing authorities	Public authorities involved in the management of the fisheries, aquaculture and blue economy sectors (fisheries management, control monitoring and surveillance, sanitary inspections, environmental management)
Research institutes	Research institutes in the partner third countries
Operators in the fishing sector	Enterprises or their associations, in the fisheries and aquaculture sectors, including the fish processing sector.
Artisanal fishing communities	Artisanal fishers and coastal communities, or their associations, dependent on fishing

Civil society	Non-governmental organisations (NGOs) / Civil Society Organisations (CSOs)
Other	Other types of direct beneficiaries

For the types of expenses supported by the activities of the sectoral support, the following categories were selected:

Types of financial support	Typical examples
Running costs	Operating costs such as consumables, salaries, subscription fees, air tickets, per diems etc ..
Investments	Infrastructures or long-lasting equipment such as software, vehicles or vessels; professional training
Other	Other types of expenses

B-Scope of the review

The scope of the review included the following 24 past and ongoing multiannual programmes agreed for implementation of the sectoral support component communicated by DG MARE:

- Côte d'Ivoire 2013-2013
- Côte d'Ivoire 2018-2024
- Cook Islands 2016-2021
- Comoros 2014-2016
- Cabo Verde 2014-2018
- Cabo Verde 2019-2024
- Gabon 2013-2016
- Greenland 2016-2020
- Guinea Bissau 2014-2017
- Guinea Bissau 2019-2024
- Kiribati 2012-2015
- Liberia 2015-2020
- Madagascar 2015-2018
- Mauritania 2012-2014
- Mauritania 2015-2021
- Mauritius 2014-2017
- Mauritius 2017-2021
- Morocco 2014-2018
- Morocco 2019-2023
- São Tomé-et-Príncipe 2014-2018
- São Tomé-et-Príncipe 2019-2024
- Senegal 2014-2019
- Seychelles 2014-2020
- Seychelles 2020-2026

The review of the multi-annual programmes listed above entailed the review of 508 different activities eligible for financial support through the EU contribution for sectoral support considered in the framework of the relevant SFPAs, representing a total EU commitment slightly in excess of EUR 206 million.

The objective was to include all activities foreseen between 2015 and 2020. For some Protocols, this led to include activities programmed for implementation before 2015 (ex. Kiribati 2012-2015) and activities started after 2020 (ex. Morocco 2019-2023). Note that the activities programmed considered are those established in the agreed multi-annual programme. Our review may miss situations where the multi-annual was changed / adapted by mutual agreement between the parties, but without an update of the matrix of

activities. Moreover, our review does not consider activities agreed under previous Protocols ending before 2015, but continued under subsequent Protocols such as the activities agreed under the 2008-2012 Protocol with Mauritania but continued until 2017.

Identification of the direct beneficiaries was based on relevant indications in the multi-annual programmes cross-checked with our own judgments. For activities directly benefiting to the private sector, the distinction between operators in the fishing sector and artisanal fishing communities was not always straightforward. For example, the upgrading of landing facilities may benefit to a wide range of operators, including artisanal fishers. In this case, we identified the direct beneficiaries as operators in the fishing sector, although artisanal fishing communities could also be considered as direct beneficiaries.

Annex 10: Main features of EU development programmes implemented in the partner third countries

Table 34: EU indicative budget for cooperation with the partner third countries (2014-2020 programming cycle except when otherwise specified)

Third country	Indicative envelope (EUR Mln)	Period covered	Focal sectors
Cabo Verde	55	2014-2020	i) Poverty reduction and growth, ii) strengthen partnership
Cook Islands	1.4	2014-2020	i) Water and sanitation
Côte d'Ivoire	273	2014-2020	i) Peace and State building, ii) Agriculture and food security, iii) Energy, iv) Civil society
Gabon	13	2014-2020	i) Education
Gambia	117	2017-2020	i) Governance, ii) Sustainable growth and job creation, iii) Energy / climate change / infrastructures
Greenland	217.8	2014-2020	i) Education, ii) Natural resources, iii) Energy, iv) Arctic issues, v) Social sector, vi) Research
Guinea Bissau	108	2015-2020	i) Health, ii) Rural development, iii) Education
Kiribati	23	2014-2020	i) Supporting inclusive and sustainable development of Kirimati
Liberia	279	2014-2020	i) Governance, ii) Energy, iii) Education, iv) Agriculture, v) Civil society
Madagascar	518	2014-2020	i) Governance, ii) Infrastructures, iii) Rural development, iv) Civil society
Mauritania	195	2014-2020	i) Food security, Rule of law, iii) Health
Mauritius	9.9	2014-2020	i) Health
Morocco	729-890	2014-2017	i) Social services, ii) Governance, iii) Growth, iv) Civil society
São Tomé	28	2014-2020	i) Water and sanitation, ii) Strengthening agriculture exports
Senegal	347	2014-2020	i) Governance, ii) Agriculture and food security, iii) Water and sanitation, iv) Civil society
Seychelles	2.2	2014-2020	none (TCP only)

Sources: National Indicative Programmes 11th EDF, except Morocco (Cadre Unique d'Appui) and Greenland (Council Decision 2014/137)

Table 35: Comparison between the indicative envelopes for cooperation and the maximum annual budget to support implementation of the sectoral support in the framework of SFPAs

Third country	Annualised Indicative envelope (EUR Mln) (a)	Annual budget for sectoral support (EUR Mln) (b)	(b) / (a)	Reference Protocol for sectoral support budget
Cabo Verde	7.9	0.28	4%	CPV1418
Cook Islands	0.2	0.35	175%	COK1621
Côte d'Ivoire	39.0	0.28	1%	CIV1318
Gabon	1.9	0.45	24%	GAB1316
Gambia	29.3	0.28	1%	GMB1925
Greenland	31.1	2.90	9%	GLD1620
Guinea Bissau	18	4.00	22%	GNB1924
Kiribati	3.3	0.38	11%	KIR1215
Liberia	39.9	0.36	1%	LIB1520
Madagascar	74.0	0.70	1%	MAD1518
Mauritania	27.9	4.13	15%	MRT1521
Mauritius	1.4	0.36	25%	MUS1721
Morocco	200.0	14.00	7%	MOR1418
São Tomé	4.0	0.33	8%	STP1418
Senegal	49.6	0.75	2%	SEN1419
Seychelles	0.3	2.50	795%	SYC1420

Sources: Table 34 for indicative envelope – Reference protocols specified in the last column for annual budget for sectoral support

Note: the annualised indicative envelope for cooperation is the total budget divided by the number of years covered by the programme (e.g. seven years for 2014-2020). Annualisation is to allow comparison on a similar time scale.

Table 36: Occurrences of Budget Support Contracts concluded between the EU and partner third countries for implementation of elements of the cooperation programmes

Third country	Budget support	Number of BS contracts
Cabo Verde	Yes	1
Cook Islands	Yes	1
Côte d'Ivoire	Yes	2
Gabon	No	--
Gambia	Yes	1
Greenland	Yes	n.a.
Guinea Bissau	No	--
Kiribati	Yes	1
Liberia	Yes	1
Madagascar	Yes	n.a.
Mauritania	Yes	1
Mauritius	Yes	n.a.
Morocco	Yes	17
São Tomé	Yes	1
Senegal	Yes	3
Seychelles	No	--

Source: INTPA Budget support – trends and results 2020 updated following exchanges with DG INTPA

Note: n.a. : information not available

Annex 11: Established targets for the United Nations Sustainable Development Goal 14 (Life below water)

SDG 14 targets
14.1 By 2025 , prevent and significantly reduce marine pollution of all kinds, in particular from land-based activities, including marine debris and nutrient pollution
14.2 By 2020 , sustainably manage and protect marine and coastal ecosystems to avoid significant adverse impacts, including by strengthening their resilience, and take action for their restoration in order to achieve healthy and productive oceans
14.3 Minimize and address the impacts of ocean acidification, including through enhanced scientific cooperation at all levels
14.4 By 2020 , effectively regulate harvesting and end overfishing, illegal, unreported and unregulated fishing and destructive fishing practices and implement science-based management plans, in order to restore fish stocks in the shortest time feasible, at least to levels that can produce maximum sustainable yield as determined by their biological characteristics
14.5 By 2020 , conserve at least 10 per cent of coastal and marine areas, consistent with national and international law and based on the best available scientific information
14.6 By 2020 , prohibit certain forms of fisheries subsidies which contribute to overcapacity and overfishing, eliminate subsidies that contribute to illegal, unreported and unregulated fishing and refrain from introducing new such subsidies, recognizing that appropriate and effective special and differential treatment for developing and least developed countries should be an integral part of the World Trade Organization fisheries subsidies negotiation
14.7 By 2030 , increase the economic benefits to <u>Small Island developing States and least developed countries</u> from the sustainable use of marine resources, including through sustainable management of fisheries, aquaculture and tourism
14.a Increase scientific knowledge, develop research capacity and transfer marine technology, taking into account the Intergovernmental Oceanographic Commission Criteria and Guidelines on the Transfer of Marine Technology, in order to improve ocean health and to enhance the contribution of marine biodiversity to the development of developing countries, in particular <u>small island developing States and least developed countries</u>
14.b Provide access for small-scale artisanal fishers to marine resources and markets
14.c Enhance the conservation and sustainable use of oceans and their resources by implementing international law as reflected in UNCLOS, which provides the legal framework for the conservation and sustainable use of oceans and their resources, as recalled in paragraph 158 of The Future We Want

Source: United Nations

Annex 12: The likely effects of the COVID pandemic on the implementation of SFPAs

The likely effects of the COVID pandemic on the implementation of SFPAs

Governance of the SFPAs

- The travel restrictions limited the opportunities to organise the Joint Committees. In 2020, the Joint Committees implemented under the SFPAs with Cabo Verde, Cook Islands, Guinea Bissau, Greenland and Senegal could not be organised. As a result, there was no joint review of the implementation of the SFPAs. For Côte d'Ivoire, The Gambia, Liberia, Mauritania, Morocco and Mauritius, the Joint Committees expected to take place in 2020 could be organised on a virtual mode. However, virtual meetings limit the quality of the exchanges.
- The travel restrictions also hindered the organisation of the Joint Scientific Committees (JSCs) implemented under the multi-species SFPAs concluded with Guinea Bissau, Mauritania, Morocco, Senegal. The JSCs with Mauritania and Morocco could be organised on a virtual mode but with a restricted agendas focused on scientific advice requested by the Joint Committees to support decisions on the implementation on the SFPAs. The JSCs with Guinea Bissau and Senegal could not be organised, which increased the delays since the last meetings held (2017 and 2018 respectively).

Access component

- Utilisation of fishing opportunities: the limitations imposed on international travels complexified the organisation of crew rotations, in particular for large-scale vessels. This resulted in increased time in ports at the expense of fishing time. Information available tends to confirm a decreasing trend in utilisation of fishing opportunities in 2020 compared to previous years. However, the impacts of the COVID pandemic on utilisation of fishing opportunities available need to be assessed in detail considering other factors underpinning utilisation such as abundance of resources (there is no "normal" year in the fishing sector), or conditions governing access.
- Direct interactions between the EU fleet and the fisheries sector of the partner third countries: the COVID pandemic hindered boarding of nationals from partner third countries to work on EU vessel as crew or as observers. It also prevented access of EU vessels to the ports of certain partner third countries for landings. In some cases (e.g. Morocco), the partner third countries agreed to provide flexibility in relation to implementation of mandatory provisions.

Sectoral support component

- Implementation of activities: the national measures implemented by all partner third countries to counter the COVID pandemic (e.g. lockdowns, travel restrictions, quarantines) slowed down the implementation of the sectoral support programmes in particular for activities entailing physical interventions of external contractors and purchase of equipment (e.g. infrastructure, training).
- Design of the sectoral support programme: following proposals by DG MARE to do so, certain partner third countries ((e.g. Cook Islands, The Gambia, Liberia, Mauritania, Mauritius, Seychelles) considered a reallocation of funds available to implement COVID response measures for the national fishing sector, in particular the artisanal sector, to mitigate the impacts of disruptions stemming directly or indirectly from the pandemic. Examples of COVID response initiatives included hygiene measures at artisanal landing sites (The Gambia, Liberia), provision of fishing and security equipment for small-scale fishermen (Mauritius) and enhanced access to maritime training opportunities (Seychelles).

It is too early to provide measurable impacts of the COVID pandemic on SFPAs performances. However, the considerations commented above suggest that the COVID pandemic probably negatively impacted the effectiveness of SFPAs in relation to the quality of the partnership, the provision of scientific advice, the utilisation of fishing opportunities, the level of direct interactions between the EU fleet and the fishing sector of the partner third countries and the outcomes and the pace of implementation of the sectoral support component.

Source: own elaboration

Annex 13: List of cooperation projects in the fields of fisheries and aquaculture including SFPAs partner third countries in their scope

A- List of main ongoing projects in December 2020

#	Name	Short description	Region	Country	EU contribution	Project starting date	End date of activities
1	FISH4ACP	In 12 fisheries or aquaculture value chains, the action will: 1) improve knowledge of the functioning of value chains and support the development of specific improvement strategies; 2) increase Micro Small and Medium Sized Enterprises (MSMEs) economic performance through strengthened market access, conducive business and regulatory environments; 3) improve the inclusiveness and the social sustainability at the different stages within the value chain; 4) enhance environmental sustainability of selected value chains through improved management of natural resources and increased consideration for climate change; and 5) facilitate MSMEs' access to additional sources of finance and investment.	ACP		47 452 400(*)	01/03/2020	28/02/2025
2	PEUMP	The programme purpose is to support sustainable management and development of fisheries for food security and economic growth, while addressing climate change resilience and conservation of marine biodiversity. The programme will address six key result areas designed to improve living conditions and human rights in Pacific ACPs: 1 - High quality scientific and management advice for oceanic fisheries provided and utilised at regional and national level; 2- Inclusive economic benefits from sustainable tuna fishing increased through supporting competent authorities and strengthening private sector capacities to create decent employment; 3- Sustainable management of coastal fisheries resources and ecosystems improved through better quality scientific information, legal advice, support, mentoring and empowerment at community level; 4- Illegal, Unreported and Unregulated (IUU) fishing reduced through enhanced monitoring control and surveillance of both oceanic and coastal fisheries, improved legislation, access to information, and effective marine area management; 5- Sustainable utilisation of the coastal and marine biodiversity promoted through improving marine spatial planning, increasing climate change resilience, enhancing biodiversity conservation and rehabilitation measures; 6- Capacity built through education, training and research and development for key stakeholder groups in fisheries and marine resources management.	Pacific		35 000 000	01/07/2018	31/03/2023

#	Name	Short description	Region	Country	EU contribution	Project starting date	End date of activities
3	Contribution of Sustainable Fisheries to the Blue Economy of the Eastern Africa, Southern Africa and Indian Ocean region – E€OFISH programme	The programme will support the implementation of measures contributing to the achievement of the objectives of the Regional Fisheries Management Organisations (RFMOs), i.e. the implementation of the fisheries management plans (Result 1), the enforcement of RFMO legislation and improvement of compliance records (Result 2). The programme will also provide support to small-scale fisheries communities (Result 3) to allow them to actively participate in the management and development of the fisheries sector in a bid to address the marginalisation of small-scale fisheries (SSF).	EA-SA-IO		28 000 000	13/09/2019	12/09/2026
4	Improved regional governance in Western Africa (PESCAO)	The overall objective of this programme is to enhance the contribution of fisheries resources to sustainable development, food security and poverty alleviation in West Africa. The specific objective is to improve regional fisheries governance in Western Africa through better coordination of national fisheries policies. The expected results or outputs are: Result 1: A Western African fisheries and aquaculture policy is developed and coordination of regional stakeholders is improved Result 2: Prevention of and responses to IUU fishing are strengthened through improved Monitoring, Control and Surveillance (MCS) at national and regional levels Result 3: Marine resources management at the regional level is improved, building resilience of marine and coastal ecosystems to perturbations	Western Africa		16 577 000	15/06/2017	15/06/2026
5	PROMOPÊCHE, Creation of decent jobs and consolidation of existing employment for young people and potential migrants in the artisanal fishing sector	Les principales actions de ce projet visent à contribuer à la création d'emplois directs et à améliorer les conditions de vie et de travail de la population la plus vulnérable de la partie nord de Mauritanie, qui comprend principalement les jeunes pêcheurs artisanaux et les femmes travaillant dans la transformation du poisson. Le projet contribuera à la création d'emplois nets dans le secteur de la pêche artisanale, à la transformation de produits halieutiques et au développement de l'agriculture locale dans la région. D'autre part, il mettra en œuvre des actions qui feront en sorte que le lieu de pêche artisanale conservera sa capacité de génération actuelle, étant donné qu'il s'agit du principal employeur de la région nord de la Mauritanie, et que celle-ci ne diminue pas dans le temps comme cela a été le cas dans les pays voisins suite à la surexploitation de ce dernier.	Western Africa	Mauritania	24 000 000	2018	2023
6	Evidence based approach for sustainable management of tuna resources in the Atlantic - Atlantic Ocean Tuna Tagging Program (AOTTP)	The specific objective of this programme is to provide evidence based scientific advices to developing coastal states, and other Contracting Parties to the International Commission for the Conservation of Atlantic Tunas (ICCAT), to support the adoption of effective Conservation and Management Measures (CMMs).	All		13 680 000	30/06/2015	27/02/2021

#	Name	Short description	Region	Country	EU contribution	Project starting date	End date of activities
7	FISHGOV2	As a follow up of FISHGOV1, this action's overall objective is to enhance the contribution of sustainable fisheries and aquaculture to the achievement of the AU Agenda 2063's objectives, notably in terms of food security, livelihoods and wealth creation. Taking into account lessons learnt from FISHGOV1 and contextual changes, this action will address 3 strategic issues where collaboration with AU institutions will provide additional value and will complement EU action at regional and national levels. First, the action will support evidence based decision making on sustainable fisheries and aquaculture through improved knowledge, effective consultation, solid reporting and the promotion of cross-sectoral approaches. Second, coherent implementation of the PFRS will be facilitated at continental, regional and national level. Third, the action will strengthen African voice in international fora and domestication of global instruments.	PANAF		12 000 000	01/01/2021	30/06/2025
8							
9	EU Liberia Agriculture programme - Fisheries sub-sector (EULAP)	SO: Develop a competitive, efficient and sustainable fisheries value chain. R1/ Strengthening Governance of fisheries R2/ Improving conditions for sustainable value chain development R3/ Strengthening Community capacity	Western Africa	Liberia	7 000 000	13/12/2019	12/12/2023
10	FISH FORWARD 2 - Responsible seafood consumption for the benefit of people,oceans and climate	Fish Forward 2 is a pan-European project raising awareness about the social and environmental impacts of fish consumption. It aims to achieve behavior change in consumers and businesses in Europe based on an increased awareness and knowledge of the implications of seafood consumption on people and oceans in developing countries, and also in Europe.	EU		6 277 027	01/01/2018	31/12/2020
11	Projet d'Appui aux Marchés Piscicoles en Analamanga (AMPIANA)	Le projet vise à soutenir les exploitations artisanales à maîtriser la conduite d'une pisciculture rentable et durable dans le cadre d'une filière organisée	EA-SA-IO	Madagascar	1 700 000	01/02/2015	31/12/2020
12	Projet d'appui à la contribution effective de la société civile à la bonne gouvernance et au développement de la pêche artisanale en Mauritanie	Le projet prévoit la mise en place d'un mécanisme de gouvernance de la société civile capable de représenter efficacement les opérateurs économiques dans le dialogue politique national et international et fournir des services essentiels pour la valorisation durable des filières de la pêche artisanale.	Western Africa	Mauritania	419 989	01/01/2017	30/06/2021
13							
14							

Evaluation and analysis of the Sustainable Fisheries Partnership Agreements (SFPAs) between the EU and third countries including an in-depth analysis of the sectoral support component of the SFPAs

#	Name	Short description	Region	Country	EU contribution	Project starting date	End date of activities
15	Integrated Rice-fish Farming: A Research and Extension Development Based Initiative to Improve Food Security and Nutrition in Liberia	This DeSIRA project in Liberia complements the EULAP aquaculture project. Concretely it experiments with and promotes an intensive integrated rice-fish system for lowlands. In line with the needs and intensive character of the system, the project also looks into formulations of feed sourced from local ingredients.	Western Africa	Liberia	3 500 000	13/01/2020	23/04/2025

Source: DG INTPA

(* Including the funding from the German government (EUR 7 452 400)

B- List of completed projects

#	Name of the project	Objective(s)	Region(s)	Country	EU Contribution (EUR)	Starting date of activities	Final date for implementation
16	Strengthening fisheries management in ACP countries (ACPFISH II)	The overall objective is to contribute to the sustainable and equitable management of fisheries in ACP regions, thus leading to poverty alleviation and food security in ACP states.	ACP		30 000 000	19/12/2007	31/12/2013
17	Implementation of a Regional Fisheries Strategy for the ESA-IO (IRFS/SMARTFISH)	The overall objective is "an increased social, economic through the sustainable exploitation of fisheries resources", reflecting the political aspirations of the target countries. The specific objective is to support the implementation of the ESA-IO fisheries strategy for sustainable management and development of the fishery sector.	EA-SA-IO		21 000 000	22/03/2010	22/03/2014
18	Implementation of a Regional Fisheries Strategy for the ESA-IO (phase II) (SMARTFISH II)	The overall objective of phase II (such as phase I) is to contribute to and increase level of social and economic development, environmental protection, and deeper regional integration in the ESA-IO region	EA-SA-IO		16 000 000	22/03/2014	06/09/2017
19	Accelerate progress towards MDG 1c in Mozambique	The contract supports three on-going projects with the aim to accelerate the attainment of the Millennium Development Goals (MDG): the Artisanal Fisheries Promotion Project (ProPESCA); the Rural Markets Promotion Programme (PROMER) and the PRONEA Support Project (PSP) which will strengthen the National Agricultural Extension Programme. In addition support is provided to the Promotion of Small Scale Aquaculture (PROAQUA), which will be implemented by the National Institute for Aquaculture Development. The Action takes place in 32 districts of 6 provinces within Mozambique (Sofala, Manica, Zambezia, Nampula, Cabo Delgado and Niassa).	EA-SA-IO	Mozambique	14 735 479	25/04/2013	31/12/2019
20							
21	Strengthening institutional capacity to enhance governance in the fisheries sector in Africa (FISHGOV)	The overall objective is to enhance the contribution of fishery sector to food security and economic growth in Africa. The specific objective is to improve institutional and policy environment for sustainable utilisation and management of fishery	PANAF		11 181 500	08/04/2014	09/03/2019
22	Gouvernance, politiques de gestion des ressources marines et réduction de la pauvreté dans	The overall objective is to contribute to poverty reduction and to strengthen food security of the coastal populations of the WAMER ecoregion. The specific objectif is to ameliorate the governance and to promote the adoption of best practices for the sustainable exploitation of the coastal and sea resources in the WAMER écoregion.	Western Africa		9 950 000	21/12/2011	30/12/2016

#	Name of the project	Objective(s)	Region(s)	Country	EU Contribution (EUR)	Starting date of activities	Final date for implementation
	l'Ecorégion WAMER (Mauritanie, Sénégal, Gambie, Guinée-Bissau, Guinée, Sierra Léone et Cap-Vert) (WAMER)						
24	Scientific Support for the Management of Coastal and Oceanic Fisheries in the Pacific Islands Region (SCICOFish)	The overall objective is the sustainable use of coastal and oceanic fisheries resources in the P-ACP region. The project specific objective is to provide a reliable and improved scientific basis for management advice and decision making in oceanic and coastal fisheries.	Pacific	Pacific	9 578 000	03/03/2010	03/09/2015
25	Development of sustainable tuna fisheries in Pacific ACP countries phase 2 (DevFish II)	The overall objective is to increase the contribution from the sustainable use of highly migratory marine resources, particularly tuna, to the alleviation of poverty in P-ACP countries, including Timor Leste. The project purpose is to reduce constraints to domestic tuna industry development. These arise from economic and environmental vulnerabilities, including lack of local capacity to manage and support the tuna industry including small scale operations and from IUU fishing activities which both divert economic benefits and threaten efforts to sustainably manage the resource. Economic benefits will be secured without increasing total catches.	Pacific		8 718 000	03/03/2010	03/03/2018
26	Improving Food Security and Reducing Poverty through intra-regional Fish Trade in sub-Saharan Africa (WORLDFISH)	The overall objective is to improve food and nutritional security and reduce poverty in sub-Saharan Africa by enhancing the capacities of regional and pan-African organizations to support their member states to better integrate intra-regional fish trade into their development and food security policy agendas	PANAF		5 000 000	19/12/2013	30/06/2019
27	Raising awareness for implications of seafood choices highlighting the global interdependencies in the context of the European Year for Development 2015	Specific objectives: By 2017 consumers, corporate sector and relevant authorities in the target countries have a better understanding of a sustainable seafood and its impact on poverty reduction in developing countries and thereby taking responsibility as active contributors to sustainable development.	All		4 931 359	01/01/2015	30/06/2019

#	Name of the project	Objective(s)	Region(s)	Country	EU Contribution (EUR)	Starting date of activities	Final date for implementation
28	Aménagement Durable des Pêcheries du Sénégal (ADuPeS)	The overall objective is to establish the sustainable management of individualized fisheries (management plans for octopus and demersal shrimps) and an evaluation and stocks assessment system for all the demersal fisheries of Senegal.	Western Africa	Senegal	4 000 000	26/09/2012	26/09/2018
29	Accompany developing countries in complying with the Implementation of Regulation 1005/2008 on IUU Fishing	The overall objective is to help third countries to implement Catch Certification Scheme (CCS) provided for in the EU IUU Regulation.	All		2 437 430	08/10/2010	07/04/2013
30	MESA ECOWAS THEMA : Coastal and marine resources management in the ECOWAS states	To increase the information management, decision-making and planning capacity of Economic Community of West African States (ECOWAS) institutions mandated for coastal and marine management, by enhancing access to and exploitation of relevant Earth Observation (EO) data.	Western Africa		1 828 000	18/02/2014	17/01/2017
31	Projet d'Appui aux Marchés Piscicoles en Analamanga (AMPIANA)	Le projet vise à soutenir les exploitations artisanales à maîtriser la conduite d'une pisciculture rentable et durable dans le cadre d'une filière organisée	EA-SA-IO	Madagascar	1 700 000	01/02/2015	30/09/2019
32	Development of ecological sustainable fisheries practices in the Benguela Current Large Marine Ecosystems (ECOFISH)	Promote implementation of the ecosystem approach to fisheries (EAF) in the Benguela Current Large Marine Ecosystem (BCLME) and supporting the conservation of marine resources through the effective management of Marine Protected Areas	EA-SA-IO		1 499 883	01/01/2011	30/06/2017
33	Development of Sustainable Inland Fishfarming to Achieve Food Security in Rural Liberia	Overall Objective: To significantly reduce the negative effects of the food price rises on the poorest consumers in Liberia.	Western Africa	Liberia	1 165 218	15/12/2009	14/12/2013
34	Projet Piscicole Madagascar Côte Est (PPMCE)	Deux objectifs généraux: - La disponibilité des protéines de bonnes qualités nutritionnelles pour l'alimentation des populations rurales des Régions Est & Analanjirifo est augmentée et sécurisée - Les capacités des acteurs régionaux à	EA-SA-IO	Madagascar	1 147 000	11/12/2012	10/07/2017

#	Name of the project	Objective(s)	Region(s)	Country	EU Contribution (EUR)	Starting date of activities	Final date for implementation
		évaluer, analyser et proposer des actions visant le renforcement de la situation alimentaire et nutritionnelle des populations sont renforcées					
35	Job Creation and Sustainable Livelihoods through implementation of the Small-scale Fishery Policy	The specific objectives include: (i) Capacity Building and empowerment of the members of the fishing communities and the CBO Coastal Links; (ii) Formation of empowered cooperatives able to engage with government in the co-management of fisheries and benefit from job creation via the implementation of the SSF Policy; (iii) Production of training, capacity building and knowledge transfer materials and toolkits in relevant SA languages to allow escalation; and (iv) Improved dialogue with DAFF and DTI (the latter provides support for empowerment and capacity building of co-operatives in a few fishing communities).	EA-SA-IO	Southern Africa	1 000 000	24/04/2015	23/04/2018

Source: DG INTPA

Annex 14: List of public documents consulted

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Regulation (EU) No 1380/2013 of the European Parliament and of the Council of 11 December 2013 on the Common Fisheries Policy, amending Council Regulations (EC) No 1954/2003 and (EC) No 1224/2009 and repealing Council Regulations (EC) No 2371/2002 and (EC) No 639/2004 and Council Decision 2004/585/EC. OJ L 354, 28.12.2013, p. 22–61 [Link to document](#)

EU Control System

Council Regulation (EC) No 1224/2009 of 20 November 2009 establishing a Community control system for ensuring compliance with the rules of the common fisheries policy, amending Regulations (EC) No 847/96, (EC) No 2371/2002, (EC) No 811/2004, (EC) No 768/2005, (EC) No 2115/2005, (EC) No 2166/2005, (EC) No 388/2006, (EC) No 509/2007, (EC) No 676/2007, (EC) No 1098/2007, (EC) No 1300/2008, (EC) No 1342/2008 and repealing Regulations (EEC) No 2847/93, (EC) No 1627/94 and (EC) No 1966/2006. OJ L 343, 22.12.2009, p. 1–50. [Link to document](#)

Commission Implementing Regulation (EU) No 404/2011 of 8 April 2011 laying down detailed rules for the implementation of Council Regulation (EC) No 1224/2009 establishing a Community control system for ensuring compliance with the rules of the Common Fisheries Policy. OJ L 112, 30.4.2011, p. 1–153. [Link to document](#)

Council Regulation (EC) No 1005/2008 of 29 September 2008 establishing a Community system to prevent, deter and eliminate illegal, unreported and unregulated fishing, amending Regulations (EEC) No 2847/93, (EC) No 1936/2001 and (EC) No 601/2004 and repealing Regulations (EC) No 1093/94 and (EC) No 1447/1999. OJ L 286, 29.10.2008, p. 1–32 [Link to document](#)

Regulation (EU) 2017/2403 of the European Parliament and of the Council of 12 December 2017 on the sustainable management of external fishing fleets, and repealing Council Regulation (EC) No 1006/2008. OJ L 347, 28.12.2017, p. 81–104 [Link to document](#)

EU Data Collection Framework

Council Regulation (EC) No 199/2008 of 25 February 2008 concerning the establishment of a Community framework for the collection, management and use of data in the fisheries sector and

support for scientific advice regarding the Common Fisheries Policy *OJ L 60, 5.3.2008, p. 1–12*. [Link to document](#)

Regulation (EU) 2017/1004 of the European Parliament and of the Council of 17 May 2017 on the establishment of a Union framework for the collection, management and use of data in the fisheries sector and support for scientific advice regarding the common fisheries policy and repealing Council Regulation (EC) No 199/2008. *OJ L 157, 20.6.2017, p. 1–21*. [Link to document](#)

Commission Implementing Decision (EU) 2016/1251 of 12 July 2016 adopting a multiannual Union programme for the collection, management and use of data in the fisheries and aquaculture sectors for the period 2017-2019 (notified under document C(2016) 4329). *C/2016/4329. OJ L 207, 1.8.2016, p. 113–177* [Link to document](#)

Commission Delegated Decision (EU) 2019/910 of 13 March 2019 establishing the multiannual Union programme for the collection and management of biological, environmental, technical and socioeconomic data in the fisheries and aquaculture sectors. *C/2019/1848. OJ L 145, 4.6.2019, p. 27–84*. [Link to document](#)

EU TAC and quota

(Annual – only 2020 version shown)

Council Regulation (EU) 2020/123 of 27 January 2020 fixing for 2020 the fishing opportunities for certain fish stocks and groups of fish stocks, applicable in Union waters and, for Union fishing vessels, in certain non-Union waters. *ST/15319/2019/INIT. OJ L 25, 30.1.2020, p. 1–156* [Link to document](#)

SANTE

Regulation (EC) No 178/2002 of the European Parliament and of the Council of 28 January 2002 laying down the general principles and requirements of food law, establishing the European Food Safety Authority and laying down procedures in matters of food safety. *OJ L 31, 1.2.2002, p. 1–24* [Link to document](#)

Regulation (EU) 2017/625 of the European Parliament and of the Council of 15 March 2017 on official controls and other official activities performed to ensure the application of food and feed law, rules on animal health and welfare, plant health and plant protection products, amending Regulations (EC) No 999/2001, (EC) No 396/2005, (EC) No 1069/2009, (EC) No 1107/2009, (EU) No 1151/2012, (EU) No 652/2014, (EU) 2016/429 and (EU) 2016/2031 of the European Parliament and of the Council, Council Regulations (EC) No 1/2005 and (EC) No 1099/2009 and Council Directives 98/58/EC, 1999/74/EC, 2007/43/EC, 2008/119/EC and 2008/120/EC, and repealing Regulations (EC) No 854/2004 and (EC) No 882/2004 of the European Parliament and of the Council, Council Directives 89/608/EEC, 89/662/EEC, 90/425/EEC, 91/496/EEC, 96/23/EC, 96/93/EC and 97/78/EC and Council Decision 92/438/EEC (Official Controls Regulation)Text with EEA relevance. *OJ L 95, 7.4.2017, p. 1–142* [Link to document](#)

Commission Delegated Regulation (EU) 2019/625 of 4 March 2019 supplementing Regulation (EU) 2017/625 of the European Parliament and of the Council with regard to requirements for the entry into the Union of consignments of certain animals and goods intended for human consumption (Text with EEA relevance.) *C/2019/11. OJ L 131, 17.5.2019, p. 18–30* [Link to document](#)

TRADE

Regulation (EU) No 978/2012 of the European Parliament and of the Council of 25 October 2012 applying a scheme of generalised tariff preferences and repealing Council Regulation (EC) No 732/2008. *OJ L 303, 31.10.2012, p. 1–82*¹³⁰ [Link to document](#)

¹³⁰ The GSP scheme is currently under review – see Proposal for a REGULATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL on applying a generalised scheme of tariff preferences and repealing Regulation (EU) No 978/2012 of the European Parliament and of the Council. *COM/2021/579 final* [Link to document](#)

Interim Agreement establishing a framework for an Economic Partnership Agreement between the Eastern and Southern Africa States, on the one part, and the European Community and its Member States, on the other part [Link to document](#)

Economic Partnership Agreement between the European Union and its Member States, of the one part, and the SADC EPA States, of the other part [Link to document](#)

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

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

Economic Partnership Agreement between the CARIFORUM States, of the one part, and the European Community and its Member States, of the other part [Link to document](#)

EMFF

Regulation (EU) No 508/2014 of the European Parliament and of the Council of 15 May 2014 on the European Maritime and Fisheries Fund and repealing Council Regulations (EC) No 2328/2003, (EC) No 861/2006, (EC) No 1198/2006 and (EC) No 791/2007 and Regulation (EU) No 1255/2011 of the European Parliament and of the Council. JO L 149 du 20.5.2014, p. 1–66 [Link to document](#)

Financial Regulation

Before 07/2018

Regulation (EU, Euratom) No 966/2012 of the European Parliament and of the Council of 25 October 2012 on the financial rules applicable to the general budget of the Union and repealing Council Regulation (EC, Euratom) No 1605/2002. OJ L 298, 26.10.2012, p. 1–96. [Link to document](#)

Commission Delegated Regulation (EU) No 1268/2012 of 29 October 2012 on the rules of application of Regulation (EU, Euratom) No 966/2012 of the European Parliament and of the Council on the financial rules applicable to the general budget of the Union. OJ L 362, 31.12.2012, p. 1–111 [Link to document](#)

After 07/2018

Regulation (EU, Euratom) 2018/1046 of the European Parliament and of the Council of 18 July 2018 on the financial rules applicable to the general budget of the Union, amending Regulations (EU) No 1296/2013, (EU) No 1301/2013, (EU) No 1303/2013, (EU) No 1304/2013, (EU) No 1309/2013, (EU) No 1316/2013, (EU) No 223/2014, (EU) No 283/2014, and Decision No 541/2014/EU and repealing Regulation (EU, Euratom) No 966/2012 PE/13/2018/REV/1. OJ L 193, 30.7.2018, p. 1–222 [Link to document](#)

Working and training conditions in the fishing sector

Council Directive (EU) 2017/159 of 19 December 2016 implementing the Agreement concerning the implementation of the Work in Fishing Convention, 2007 of the International Labour Organisation, concluded on 21 May 2012 between the General Confederation of Agricultural Cooperatives in the European Union (Cogeca), the European Transport Workers' Federation (ETF) and the Association of National Organisations of Fishing Enterprises in the European Union (Europêche) (Text with EEA relevance.). OJ L 25, 31.1.2017, p. 12–35. [Link to document](#)

Council Decision (EU) 2015/799 of 18 May 2015 authorising Member States to become party, in the interest of the European Union, to the International Convention on Standards of Training, Certification and Watchkeeping for Fishing Vessel Personnel, of the International Maritime Organization (Text with EEA relevance). OJ L 127, 22.5.2015, p. 20–21 [Link to document](#)

Annex 15: Summary report of the Public Consultation on SFPAs

Introduction

The Public Consultation on the evaluation of SFPAs ran from 31 March 2021 to 23 June 2021 according to the obligatory 12-week consultation period as stated in the Better Regulation Guidelines. It was open to all citizens and the wider stakeholder community, and translated into all EU languages. The questionnaire was available from the "Have you say" web site of the Commission ([link](#)).

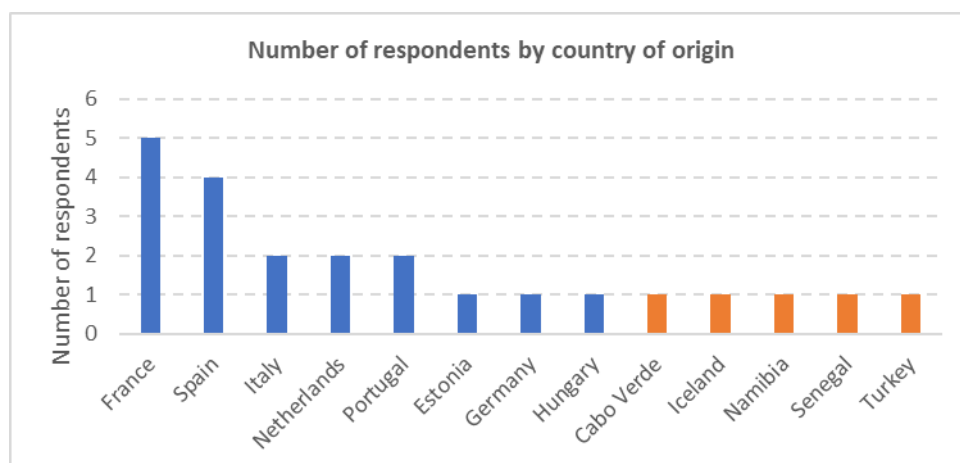
The PC questionnaire aimed to collect feedback organised in two sections:

- 4 general questions – to assess the relevance and effectiveness of EU interventions under the framework of SFPAs, aimed at respondents with limited or no knowledge of the instrument.
- 10 specialised questions – to assess the relevance, effectiveness and coherence of the EU interventions under the framework of SFPAs, aimed at respondents with a more in-depth knowledge of the instrument.

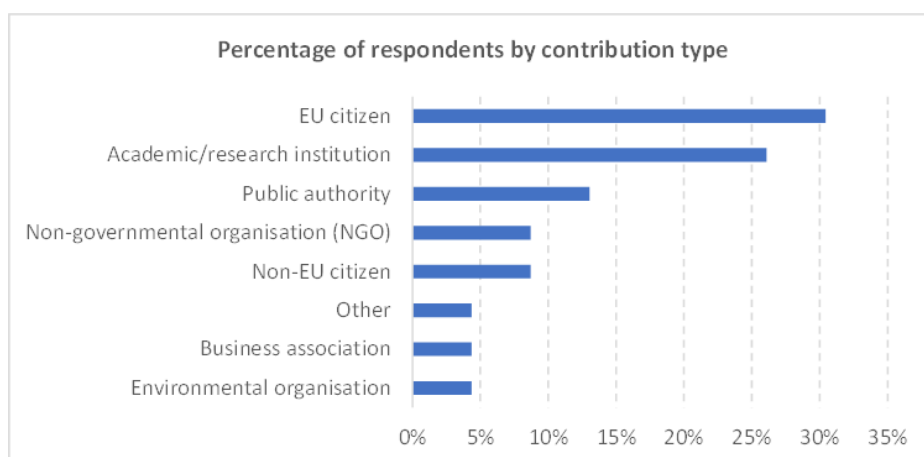
Overall **23** respondents participated in the Public Consultation, of whom **15** (65%) also responded to the specialised questions.

Respondents' profile

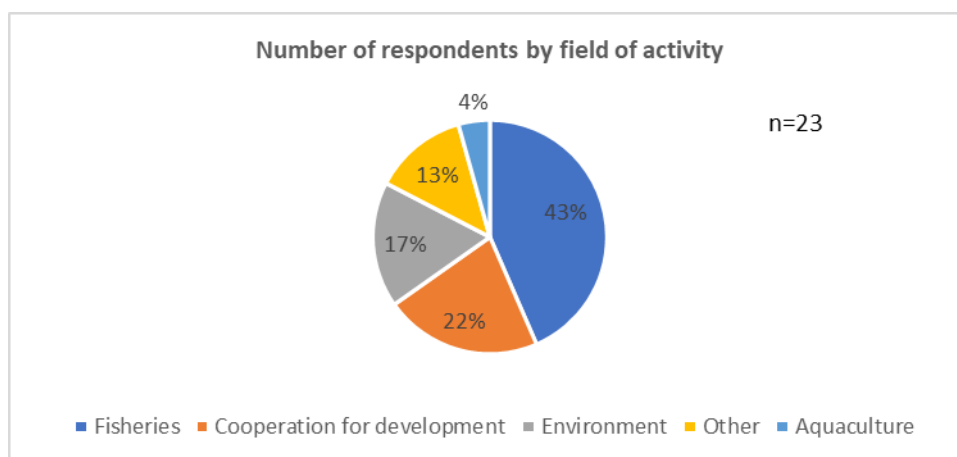
The 23 respondents represented 18 EU Member States (78%) and 5 (22%) non-EU countries (Cabo Verde, Iceland, Namibia, Senegal and Turkey) of which two (Cabo Verde and Senegal) are a partner country of the EU in the framework of an SFPA.



30% (7 out of 23) gave their contribution as EU citizens, and 26% (6 out of 23, including one non-EU) as Academic / Research institutions. The rest included Public Authorities (3 out of 23, all from EU Member States), Non-governmental organisations and Non-EU citizens (2 out of 23 each), and one contribution as Business association, Environmental organisation and other.



In terms of main field of activity, 43% of respondents (10 out of 23) reported fisheries, 22% (5 out of 23) cooperation for development, 17% (4 out of 23) environment, 13% (3 out of 23) other, and 4% (1 out of 23) aquaculture.



Summary of responses to general questions

To what extent do you agree or disagree with the following statements?

Number of respondents=23	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know
EU fishing vessels fishing in non-EU waters need access to third countries' waters	26%	26%	26%	13%	9%	0%
The fisheries governance framework in non-EU waters (where the EU fleet is active) needs to be strengthened	57%	30%	4%	0%	4%	4%
Developing coastal states need to be supported to design and implement a sustainable fisheries policy	78%	17%	0%	4%	0%	0%

- A majority of respondents strongly agreed (26%, 6 out of 23) and agree (26%, 6 out of 23) on the fact that EU fishing vessels fishing in non-EU waters need access to third countries' waters, and 24% have an opposite opinion (13%, 3 out of 23 disagree and 9%, 2 out of 23 strongly disagree). 26% of respondents (6 out of 23) did not express an opinion in this regard.
- A fairly large majority of respondents (87%) were in the opinion that the fisheries governance framework in non-EU waters (where the EU fleet is active) needs to be strengthened, with 57% (13 out of 23) strongly agreeing and 30% (7 out of 23) agreeing). One respondent strongly disagreed with this statement, and one provided a neutral response.
- A similar fairly large majority of respondents (95%) strongly agreed (78%, 18 out of 23) or agreed (17%, 4 out of 23) on the fact that developing coastal states need to be supported

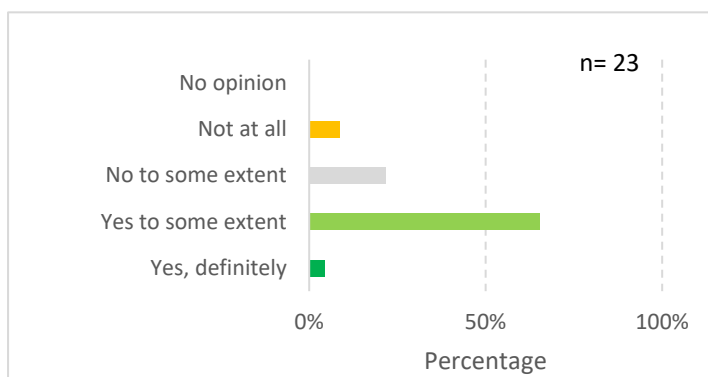
to design and implement a sustainable fisheries policy. One respondent disagreed with this statement.

To what extent do you agree or disagree with the following statements?

Number of respondents=23	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know
SFPAs are a relevant EU policy tool to implement a dedicated partnership between the EU and third countries to promote sustainability of fishing activities	26%	48%	9%	9%	9%	0%
SFPAs are a relevant EU policy tool to support the economic and social development of the fishing sector in the third countries	30%	22%	22%	13%	9%	4%
SFPAs are more likely to achieve positive results compared to private access arrangements negotiated by EU shipowners	43%	43%	9%	0%	4%	0%

- A majority of respondent (74%) strongly agreed (26%, 6 out of 23) or agreed (48%, 11 out of 23) that SFPAs are a relevant EU policy tool to implement a dedicated partnership between the EU and third countries to promote sustainability of fishing activities. Two respondents (9%) disagreed, two other respondents strongly disagreed (9%).
- A small majority (52%) of respondents strongly agreed (30%, 7 out of 23) or agreed (22%, 5 out of 23) to support the statement that SFPAs are a relevant EU policy tool to support the economic and social development of the fishing sector in the third countries. 22% (5 out of 23) had a neutral opinion, and 22% either disagreed (3 out of 23) or strongly disagreed (2 out of 23) on this statement.
- A fairly large majority of respondents (86%) strongly agreed (43%, 10 out of 23) or agreed (43%, 10 out of 23) that SFPAs are more likely to achieve positive results compared to private access arrangements negotiated by EU shipowners. Only one respondent out of 23 strongly disagreed, and two had a neutral opinion on this statement.

Do you consider that EU interventions through SFPAs have contributed to the implementation of sustainable fishing practices in the waters of third countries?



A majority of respondents (70%, 16 out of 23) acknowledged that EU interventions through SFPAs have contributed to the implementation of sustainable fishing practices in the waters of third countries to some extent. 30% of respondents expressed a different view with 22% (5 out of 23) of respondents answering "no to some extent" and 2 out of 23 answering not at all.

The questionnaire provided an opportunity for respondents to express their arguments supporting their appreciation of the contribution of SFPAs to the implementation of sustainable fishing practices in the waters of third countries.

- For respondents agreeing on a positive contribution of SFPAs, the main rationale supporting their appreciation was the adequate framework of SFPAs to develop science-based management measures, supported by collection of relevant scientific data through catch reporting and observers analysed by scientific committees. Certain respondents also put forward the transparency elements of SFPAs and the reporting obligations imposed to EU vessels through the Protocols.
- For respondent not agreeing on a positive contribution of SFPAs, reasons underpinning negative appreciations included the lack of impacts of SFPAs on the management framework

of shared resources, a perceived non-application of SFPAs standards to other foreign fleets, and a lack of follow-up of utilisation of sectoral support funding by the partner third countries.

Summary of responses to optional specialised questions

As mentioned in the introduction, 15 respondents out of 23 (65%) agreed to proceed to specialised questions.

To what extent do you think the following objectives have been met?

Number of respondents=15	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know
SFPAs have contributed to improve the fisheries governance framework in the waters of partner countries	0%	40%	33%	20%	7%	0%
SFPAs have contributed to develop the capacities of partner countries in monitoring, control and surveillance of fishing activities under their responsibilities as flag State, coastal State or port State, with positive impacts on combatting IUU fishing	7%	47%	27%	13%	0%	7%
SFPAs have contributed to develop and support the necessary scientific and research institutions	20%	20%	20%	20%	7%	13%
SFPAs are of mutual benefit to the EU and to the partner country, including its local population and fisheries sector	7%	47%	27%	13%	7%	0%
Under SFPAs, EU vessels only catch surplus identified on the basis of the best scientific advice available	0%	33%	27%	13%	13%	13%

- 40% of respondents (6 out of 15) agreed that SFPAs have contributed to improve the fisheries governance framework in the waters of partner countries, 33% (5 out of 15) had a neutral opinion in this respect, while 27% (4 out of 15) disagreed to various extent.
- A majority of respondents (54%) was in the opinion that SFPAs have contributed to develop the capacities of partner countries in monitoring, control and surveillance of fishing activities under their responsibilities as flag State, coastal State or port State, with positive impacts on combatting IUU fishing, 27% (4 out of 15) had a neutral opinion, and 13% (2 out of 15) disagreed somehow.
- The extent to which SFPAs have contributed to develop and support the necessary scientific and research institutions yielded a more balanced opinion, but 40% of respondents (6 out of 15) had a positive opinion. However, 20% (3 out of 15) had a neutral opinion, 20% (3 out of 15) disagreed and 13% (2 out of 15) had no opinion.
- A majority of respondents (54%, 6 out of 15) agreed that SFPAs are of mutual benefit to the EU and to the partner country, including its local population and fisheries sector. One respondent did not agree, and 27% (4 out of 15) had a neutral opinion
- One-third of respondents (5 out of 15) were in the opinion that under SFPAs, EU vessels only catch surplus identified on the basis of the best scientific advice available, and 26% (4 out of 15) disagreed on this statement. Other respondents (6 out of 15) had a neutral opinion or no opinion.

To what extent do you agree that the following main achievements have been met at regional level through SFPAs interventions?

Number of respondents=15	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know
SFPAs have been instrumental in reinforcing regional cooperation on fisheries	13%	33%	33%	7%	7%	7%
SFPAs have enhanced cooperation and engagement of partner countries with the relevant Regional	13%	33%	13%	20%	0%	20%

Fisheries Management Organisations (RFMOs) and Regional Fisheries Organisations (RFOs)						
SFPAs have contributed positively to combatting IUU fishing at national and regional levels	7%	47%	20%	7%	7%	13%

- 47% of respondents (7 out of 15) agree that SFPAs have been instrumental in reinforcing regional cooperation on fisheries, and 33% (5 out of 15) had a neutral position. Two respondents out of 15 (14%) did not share this opinion.
- 46% of respondents (7 out of 15) were in the opinion that SFPAs have enhanced cooperation and engagement of partner countries with the relevant Regional Fisheries Management Organisations (RFMOs) and Regional Fisheries Organisations (RFOs), and 3 out of 15 (20%) had an opposite view. 3 respondents out of 15 (20%) did not have sufficient knowledge to answer
- A majority of respondents (54%, 8 out of 15) agreed that SFPAs have contributed positively to combatting IUU fishing at national and regional levels, and 2 out of 15 (14%) somewhat disagreed. Three respondents out of 15 (20%) had a neutral opinion and 2 out of 15 (13%) did not have sufficient knowledge to answer.

To what extent do you agree or disagree with the following statements on EU payments?

Number of respondents=15	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know
Fishing opportunities negotiated under SFPAs are commensurate with EU fleet interest	13%	47%	20%	7%	0%	13%
The overall financial compensation for access to waters paid to partner countries is fair compared to fishing opportunities negotiated	7%	20%	33%	20%	7%	13%
The EU shipowners contribution for access to waters should be increased	20%	27%	33%	7%	0%	13%

- A majority of respondents (60%, 9 out of 15) shared the opinion that fishing opportunities negotiated under SFPAs are commensurate with EU fleet interest, 20% (3 out of 15) had a neutral opinion, and one respondent out of 15 (7%) disagreed with this statement.
- The overall financial compensation for access to waters paid to partner countries is fair compared to fishing opportunities negotiated for 27% of respondents (4 out of 15), but 27% (4 out of 15) of respondents expressed an opposite opinion. One-third of respondents (5 out of 15) had a neutral opinion, and 2 respondents out of 15 (13%) did not have sufficient knowledge to answer.
- 47% of respondents (7 out of 15) shared the opinion that the EU shipowners contribution for access to waters should be increased, and one respondent had an opposite opinion. One-third of respondents (5 out of 15) had a neutral opinion on this statement, and 2 respondents out of 15 (13%) did not have sufficient knowledge to answer.

Sectoral support

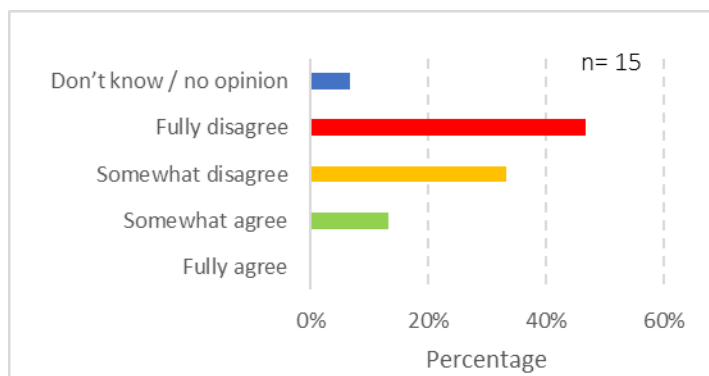
To what extent do you agree or disagree with the following statements in relation to the achievements of the sectoral support component of SFPAs?

Number of respondents=15	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know
Sectoral support has had a positive impact to the sustainable socio-economic development of the partner countries	0%	20%	40%	27%	7%	7%
Sectoral support is essential to ensure sustainable fisheries and the capacity of the partner country to perform its obligations in terms of sustainable fisheries management	7%	27%	33%	20%	7%	7%

Sectoral support activities are consistent with other EU policies (development, environment, foreign policy, etc.) in the partner countries.	0%	20%	33%	27%	7%	13%
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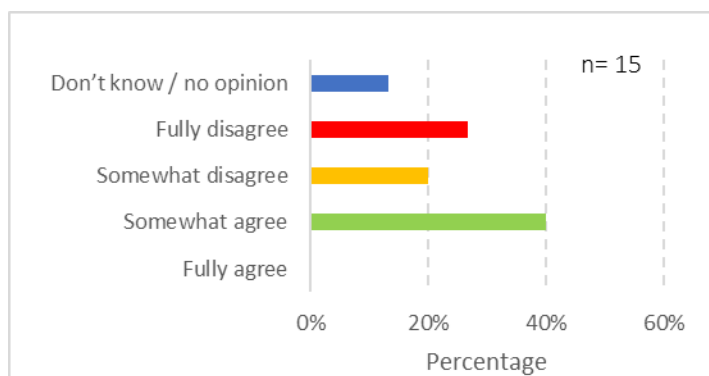
- 40% of respondents (6 out of 15) had a neutral opinion on the extent to which sectoral support has had a positive impact to the sustainable socio-economic development of the partner countries. 20% of respondents (3 out of 15) acknowledged a positive contribution, while 34% (5 out of 15) disagreed with the statement
- Opinions on the extent to which sectoral support is essential to ensure sustainable fisheries and the capacity of the partner country to perform its obligations in terms of sustainable fisheries management are balanced: 34% of respondents (5 out of 15) agreed on the statement and 27% (4 out of 15) disagreed.
- For 34% of respondents (5 out of 15), sectoral support activities are not consistent with other EU policies (development, environment, foreign policy, etc.) in the partner countries. For 20% of respondents (3 out of 15) sectoral support activities are consistent with other EU policies. One-third of respondents (5 out of 15) had a neutral opinion

Do you think that there is sufficient public information on activities implemented under the sectoral support component of SFPAs in partner countries?



A majority of respondents (80%, 13 out of 15) was in the opinion that there is not sufficient public information on activities implemented under the sectoral support component of SFPAs in partner countries; with a majority of them strongly disagreeing with the proposed statement. Two respondents out of 15 (13%) shared an opposite position.

Do you think that results of SFPAs implementation have contributed to a positive understanding of the EU intervention by partner countries' stakeholders (including administration, businesses and civil society)?

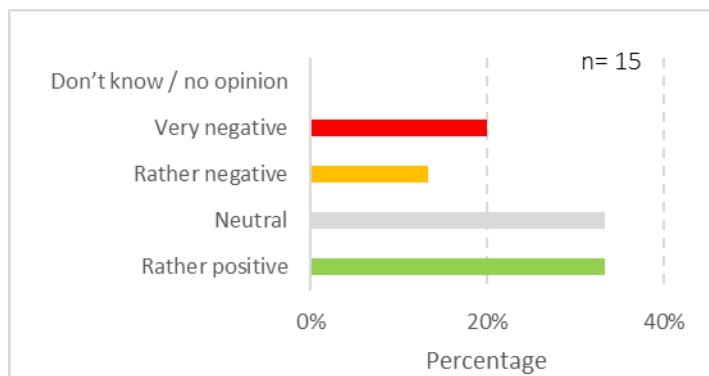


Opinions on this statement are balanced: 47% of respondents (7 out of 15) did not agree that results of SFPAs implementation have contributed to a positive understanding of the EU intervention by partner countries' stakeholders, but 6 out of 15 (40%) somewhat agreed.

The questionnaire provided an opportunity for respondents to comment on their appreciation of visibility and awareness of EU interventions under SFPAs.

The comment made by most respondents was that there is a clear lack of information on activities and achievements of the sectoral support component of SFPAs, and a lack of consultations between the authorities and the stakeholders on sectoral support design and implementation. A shared conclusion was that communication should be improved. One respondent also raised an inadequate monitoring of sectoral support performances mainly due to a lack of relevant result indicators in the matrixes of activities.

What is your general perception of the impacts of SFPAs in partner countries?



Opinions on the impacts of SFPAs in the partner countries are shared. One-third of respondents (5 out of 15) were in the opinion that impacts were rather positive, another one-third was in the opinion that impacts were rather or very negative, and one-third expressing a neutral opinion in this regard.

The questionnaire provided an opportunity for respondents to comment on their perception of the impacts of EU interventions under SFPAs.

- For certain respondents, the positive understanding of EU interventions under SFPAs was supported by its sustainable management framework incorporating science, research, monitoring and enforcement. There was a recognition that sectoral support underpinned improved conditions in the partner third countries.
- For other respondents, a negative understanding of EU interventions under SFPAs was underpinned by a failure to address environmental impacts of fishing on the broader environment (i.e. ecosystems, protected species). It was also suggested that economic interests of operators were the main drivers of EU interventions at the expense of sustainability of fishing practices and of interests of developing coastal states.

Position papers

One position paper was submitted by the FARFISH programme¹³¹ in the framework of the public consultation on the evaluation of SFPAs. The next points summarise the content of the contribution:

- Implementation of SFPAs has seen varying levels of success in different contexts, sometimes delivering objectively positive results, other times not reaching its goals. Impacts or effects of the SFPAs should be analysed on a case by case basis
- The SFPAs should be better coordinated with IUU missions as the latter is a more effective instrument to trigger institutional and normative changes to improve deficiencies linked to monitoring, control and surveillance
- The "best scientific advice available" is often not good enough to identify surplus with a sufficient scientific certainty. Determination of surplus should be a recurrent action.
- There is no evidence that SFPAs have led to more regional cooperation. SFPAs are by their nature state-based and in that sense operate against a regional approach in their current form
- Stakeholder involvement from the beginning of the negotiations and good communication with coastal communities can improve the acceptance and reputation of SFPAs between the EU and third countries

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¹³¹ FARFISH is a research project funded by the EU's Horizon2020 programme

Annex 16: Synopsis of consultation results and feedback

This synopsis report summarises the results of all the consultation activities implemented by the contractor to inform the evaluation of SFPAs. Consultation activities included i) targeted consultations of stakeholders having a stake or a stated interest in SFPAs and ii) a public consultation to gather opinions on SFPAs from any citizen or stakeholder wishing to provide feedback on the matter. Targeted consultations have been implemented between March and July 2021, and the public consultation was open for feedback between 31 March 2021 and 23 June 2021.

Before the consultation activities implemented under the study, the Commission published a roadmap to inform citizens and stakeholders about the Commission's initiative in relation to the evaluation of SFPAs. The roadmap was published on 28 January 2021 on Better Regulation website. Thirteen contributions were submitted before the closing date set on 25 February 2021. Feedback received on the roadmap is published on a dedicated [Better Regulation webpage](#).

Targeted consultations

160 stakeholders received the questionnaires. 80 stakeholders provided feedback to the consultation. The list of entities contacted, and whether they responded, is presented in Annex XXX. The following bullets summarise the extent of contributions received:

- Concerning public authorities ('management authorities'), from third countries Côte d'Ivoire, Greenland, Guinea Bissau, Liberia, Madagascar, Mauritius¹³², Morocco, Senegal, and Seychelles responded to the consultation, while in EU Member States responses were received from Denmark, Estonia, Germany, Greece, Italy, Lithuania, Netherlands, Poland and Spain.
- Most EU associations of fishing operators responded. Some contributions were received from operators in the fishing sector in third countries (Côte d'Ivoire, Guinea Bissau, Madagascar, Mauritania, and The Gambia).
- The EU NGOs having an interest in SFPAs contributed to the evaluation, as well as some NGOs based in the partner third countries (Cabo Verde, Madagascar, The Gambia).
- The evaluation team received the views with the Long-Distance Advisory Council and the Market Advisory Council during (virtual) meetings;
- Scientific experts from Spain and from Mauritania, Morocco, and Senegal involved in the Joint Scientific Committees responded .
- All EU Delegations in the third countries with an SFPA responded. Fisheries attachés also contributed through written replies to the questionnaires and through video calls.

Excluding feedback from EU delegations, fisheries attachés, research organisations, regional fisheries bodies, and financial and technical partners, **31 organisations from the EU and 25 from third countries completed the questionnaire** (Table 37 below).

Table 37: Number of organisations contacted and having responded by type of organisations

Type of organisations	EU		non-EU		Total Contacted	Total Responded
	Cont.	Respond.	Cont.	Respond.		
Managing authorities	12	9	18	9	30	18
Professional associations / operators	30	15	33	6	63	21
NGOs	10	6	19	7	29	13
Trade unions	2	1	7	3	9	4
Total	54	31	77	25	131	56

NB: excluding fisheries attachés, EU delegations, research organisations, regional fisheries bodies, and financial and technical partners; Legend: Cont. – contacted, Respond. - responded

Summary of feedback received

¹³² Views of the Mauritian authorities were collected during the ex-post and ex-ante evaluation of the Protocol to the SFPA between the EU and the third country, which took place concurrently during the first quarter of 2021.

Stakeholders focused their feedback on SFPAs with which they were involved or had an interest. Views or opinions from respondents are presented below in two groups of stakeholders: EU stakeholders and non-EU stakeholders. Feedback from technical and financial partners (TFPs) (AFD and GIZ¹³³) and regional fisheries bodies (COMHAFAT and FCWC [CPCO in French]) are provided below, while those from EU delegations, fisheries attachés, and research organisations are considered in the main text of the evaluation and not summarised below.

EU stakeholders – key points raised

This section summarises the main views and opinions of the EU stakeholders.

The majority of EU MS authorities and EU operators stressed that SFPAs are a relevant instrument to promote fisheries governance in the waters of third countries, however visibility and communication on the positive impacts of SFPAs should be enhanced.

Sectoral support:

Public visibility and **transparency** over sectoral support should be improved especially with regards to implemented measures and their results. Implementing communication plans may solve these issues in their views.

Some NGOs consider that the sectoral support component should be managed with methodologies aligned with DG INTPA **sectoral budget support** (SBS) instrument to improve transparency and effectiveness. Some suggested that sectoral support should not be part of the SFPAs.

Several other EU stakeholders including EU operators and some EU MS recommended that **non-State EU and non-EU actors be consulted and involved** in designing and implementing sectoral support to improve its efficiency and its relevance. Some EU operators recommended that sectoral support should contribute to training non-EU seafarers in complying with international standards in safety at sea.

Access:

In general, EU stakeholders stressed that **the network of SFPAs should be extended especially by reactivating dormant SFPAs, access rights** paid by shipowners and **access conditions** should (continue to) be **in line with the market prices and the EU fishing industry's needs and historical track-record**: a relevant and extended network of access being provided by SFPAs and/or reactivation of dormant SFPAs, applying flexibility between EU MS fleet in used/unused fishing possibility, avoiding compulsory landing and transshipment at ports, appropriate fishing zones, and preference for an obligation to use ACP seafarers rather than national ones from the third country. Some NGOs suggested that financial compensation for access should only be paid for by EU operators (rather than also by the Commission).

SFPAs should continue to ensure a level playing field compared to access conditions provided to non-EU foreign fishing fleets by the same partner countries. This relates to the **non-discriminatory clause** between foreign fleets in the SFPAs' texts.

Several EU stakeholders noted that the **transparency clause** needs to be better implemented to support provision of relevant information on catch and effort of other fleets, and to support the comparison of access modalities imposed by the third countries to the different fleets.

Non-EU stakeholders – key points raised

This section summarises the main views and opinions raised and shared by non-EU stakeholders.

Third countries' managing authorities and other non-EU stakeholders noted that SFPAs aim **to contribute to the third countries' economies** and should be implemented to do so both in terms of access and support. They viewed the **coherence** of sectoral support with other interventions as **generally good** but that it could be improved by regular 'round table' meetings of financial and technical partners in those countries where they do not meet to ensure coordinated support to the fisheries sector. This is especially important in partner countries where sectoral support budgets are limited.

Sectoral support – non-State actors:

- **Requested to be consulted and involved** during the negotiation process and

¹³³ GIZ views were provided through a combined questionnaire coordinated by the German fisheries authorities.

- implementation phase to improve its relevance and effectiveness; and
- noted they had insufficient information available to provide many views on the performances of the instrument due to a lack of visibility/transparency about sectoral support.

Access and sectoral support – civil society and the fisheries sector views: for some non-EU stakeholders, there is a need to counter misleading or insufficient information about the activities of the EU's external fleet. Many EU stakeholders suggested a need for **communication plans** as a solution to improve transparency and visibility.

Social clause and seafarers' needs – trade unions' views: EU and their partners should ensure that working rights, aligned with ILO guidelines and conventions, are effectively implemented. SFPAs should also **foster ratification and implementation of the ILO C188** fishers working rights Convention according to the European Trade federation (ETF) representing unions of EU seafarers.

Regional fisheries bodies that answered the consultation recommended that they be **consulted and regularly informed about SFPA negotiations and implementation** to **regional cooperation** in managing shared resources and developing the fisheries sector in the regions they cover.

I. EU stakeholders' feedback – details

A. Contribution of SFPAs

A1. To the governance framework for the exploitation of resources in third countries waters

EU MS consider that **SFPAs generally succeeded in improving governance in partner countries** by:

- identifying fishing opportunities for the EU fleets based on the best scientific knowledge available and on the UNCLOS terms (with access to living resources contingent on the notion of 'surplus' and management of fish resources);
- by increasing capacities through cooperation and collaboration and especially through the joint scientific committees and the sectoral support; and
- by improving **transparency**, in particular through the transparency clause.

However, they highlighted a continuing **need to expand scientific research capacities including in regional fisheries bodies**, to which African SFPA partner countries are members. This is particularly necessary to support partner countries in cooperating in support of **better governance of straddling stocks currently lacking a regional management framework** (e.g. small pelagic stocks in West Africa).

A2. To the activities of EU external fleets

Several EU operators consider there to be a lack of **level playing field** between the access conditions for EU and non-EU fishing fleets in some SFPAs, in contravention of the '**non-discriminatory clause**'. This issue was also raised by some EU MS (e.g. Lithuania MA in Mauritania). For instance, for PFA, Morocco has a pelagic agreement in place with another foreign fleet – Russian fleet – that have fewer restrictions and better conditions.

For some EU MS, the **requirements to land** a part of catches in third countries are not practical given conditions and market prices paid in ports, and de-incentivise full utilisation of fishing opportunities. For instance, under the Morocco SFPA category 6 'Industrial pelagic or semi-pelagic trawling and purse seining' 25% of catches have to be landed in Morocco, which could hinder the full utilisation of the SFPA fishing opportunities being not economically feasible for some vessels. For other categories with smaller vessels, the landing obligation was problematic because some crews reported feeling unsafe in certain designated ports.

The benefits of the SFPA to EU fleets is critically determined by the **fishing zones** in which they are allowed to fish. For instance, EU small pelagic fishing operators and some EU MS' MAs such as Lithuania, consider that the change in Mauritania from a 13 nm-fishing zone limit from the coast in 2012 to one of 20 nm, to reduce pressure on the sardinella stock, was implemented without sufficient assessment of its economic, environment and food security consequences. And despite the change, the sardinella stock remains in a poor state due to the continuous and increasing fishing pressure from non-EU and national fishing fleets within the 20 nautical miles area.

With regards to **cost of access**, EU MS are supportive of industry paying a **reasonable share** of the access costs. Nevertheless, the share needs to be carefully considered **in order to balance the**

need for full uptake of fishing opportunities and fair access costs (e.g. Denmark MA, Spain MA). An EU MS (Germany) suggested for example a 'dynamic fishing opportunities (FO) system'¹³⁴ for any re-negotiation of an expiring SFPAs as well as for any negotiation of new SFPAs (for example, in the course of the re-negotiation of the Mauritania SFPAs and category 6 under the SFPAs).

In addition, **EU operators' consider that the evolution of their access fee share in the future should recognise fish / fuel market prices.** The share that EU shipowners have contributed to the access payments has increased significantly during the years while they claim that the price of fish has not. And EU operators claim that fees paid by EU demersal fishing shipowners on the basis of the fishing possibilities granted increased by more than 50 % based on parameters such as GRT or GT. In the case of EU surface longlining, stakeholders consider that as economic profitability is so marginal, raising their fees would lead to low uptake of fishing authorisations. Some EU demersal fishing operators even consider that their access costs should be decreased given the **other (indirect) costs of fishing.** The Spanish MA were also concerned about high indirect costs in Cook Islands for their purse seine tuna fishing operators: the 100 % regional observer coverage scheme, costs to an EU tuna vessel USD 225 per day¹³⁵ excluding flight tickets in Cook Islands' EEZ (figure provided by the EU MS in the questionnaire), which is perceived as being too high by EU operators.

EU operators consider that **technical conditions** are in some cases not practical, and should be **agreed bilaterally if any changes are to be made before being implemented.** For demersal fishing operators active in Morocco and Mauritania, changes led to low utilisation of fishing possibilities. For instance, in Morocco, the national authorities unilaterally decided to set biological rest periods for hake without any scientific advice to back it up. In the case of Mauritania, in the current Protocol technical sheet for category 2bis, the target species are: hake, squid and cuttlefish. However, the fishing opportunities for the last two species are 'virtual' because of the delimitation of the fishing zone, 'virtual' meaning that they do not succeed in catch these species in sufficient quantities in the zones in which they are allowed to fish. A modification of the fishing zone would for catch of the above species without adverse interactions with the local fleets. As another example stressed by EU pole and line vessels targeting tropical tuna, the Protocol to the SFPAs with Senegal does not provide access terms for bait fishing, which is essential for their fishery. For these operators, **technical issues could be discussed and, as much as possible, solved by regular – quarterly – meetings between the operators and representatives of the managing authorities and research organisations.** On the same issue of technical conditions, Italy and Estonia MAs suggested that practical by-catch limits be applied for non-tuna fishing. The current rates are either too low or non-existent. The Spanish MA raised the, in their view, disproportionate actions taken by Sao Tomé and Príncipe and Liberia in 2016 and 2018 respectively: and inspections involving personnel from outside the public control services (by an NGO). Although the countries committed themselves to ensure that such disproportionate actions would not be repeated, these events led to a significant decrease in activity in these EEZs.

Furthermore, several EU operators stressed that the **geographical SFPAs coverage should be extended** as much as possible **with relevant fishing opportunities** in the Atlantic and Indian oceans to countries such as Guinea (Conakry), Sierra Leone, Ghana, Angola, Kenya, and Tanzania and by reactivating dormant SFPAs. With regards to the provision of relevant fishing opportunities, the Greek MA regretted the lack of demersal fishing opportunities in Gabon and a dormant SFPAs there. Stakeholders from Poland – Managing authorities and operators - also recommended that SFPAs should recognise historical track records of EU MS equally: Poland having joined the EU in 2004 is not included in North Atlantic Agreements whereas Polish fishing operators have historical track-record in the region. For the Estonian MA, access to new entrants without historical track-record should also be better considered when negotiating fishing opportunities. One Spanish PO raised a similar issue in Greenland: while their members do not receive a quota through the Relative Stability Principle, the clause of using unused fishing opportunities has never been applied in good faith in their views, especially since they noted that year after year many opportunities remain unused.

EU tuna fishing operators noted that the obligation of embarking **ACP seafarers**, compared to embarking national ones, is the best option for logistical reasons but also due to skill levels. Embarking-disembarking seafarers in each country is costly. They prefer ACP seafarers due to their

¹³⁴ That is fishing opportunities and access rights evolving during the implementation Period of a Protocol based on important changes such as market prices and abundances of fish species targeted in the fishing zone. For the Poland MA, for instance, access costs should be adjusted to the actual fish market prices in their views: in the agreement between the EU and Mauritania, some small pelagic fish are several times cheaper than others, but the access rights for their catches are the identical up till now.

¹³⁵ Cost of employing observers designated by Cook Islands.

fishing trips covering several fishing zones including the high seas. Also, some countries do not have adequate reservoirs of skilled seafarers to be employed on their vessels.

A3. To the development of the third countries fishing sector

EU MS recognise that the capacities of third countries to implement their responsibilities varies widely and that some third countries do not have the capacity to ensure appropriate monitoring of their exclusive economic zone and the catches made therein. **Supporting third countries in exercising their flag, coastal, and port State responsibilities** through provisions in the agreements, sectoral support, and development cooperation **should continue** to be a focus for SFPAs.

Coastal parties of several SFPAs have already begun implementing or expressed intentions to implement Electronic Reporting System (ERS), and in some cases to follow the United Nations Fisheries Language for Universal eXchange (UN-FLUX) standard for many of the control/data collection measures, which is the agreed-upon standard for the EU. Also, SFPAs contribute in general to **scientific capacity building** within third countries in the view of EU stakeholders. The Greek MA proposed to enhance scientific capacity building by promoting synergies with the involved EU MS' institutions, or even making it compulsory for better control from the Joint Committee on the way the funding for scientific capacity building is used.

B. Sectoral support

B1. Identification and implementation of sectoral support measures

EU MS and the civil society recommended that **better transparency** and publicly available documentation on how the sectoral support funds are used¹³⁶ would improve (i) coordination and synergies of the SFPA sectoral programmes with EU MS and partner countries' development programmes, and (ii) their acceptability. For them, such transparency is currently lacking.

EU MS and the civil society recommended that non-State actors and development agencies should be consulted when identifying the sectoral support measures and during their implementation phase to improve sectoral support effectiveness and synergies. EU operators recommended to be consulted for their proposals for sectoral support, for instance through a direct communication channel between the EU services and the EU operators.

Disbursement and implementation of sectoral support should also be defined clearly from the start according to stakeholders.

A thorough 'structural evaluation' of the SFPA sectoral aids could be undertaken to identify enabling and prohibiting factors for sectoral support success and propose adequate improvements too (Germany MA).

For EU small pelagic freezing trawlers and EU purse seiners, the sectoral support should focus on developing infrastructure to better support interactions with the private sector in partner countries. For example, investments in ports (quays for fishing vessels with enough draft for EU vessels) and maritime schools / academies to train seafarers according to the international standards that apply to any personnel employed onboard EU fishing vessels.

B2. Impacts

For EU MS, sectoral support is thought to have improved **capacities in research institutes, fisheries surveillance, and scientific research** and enabled participation by partner countries' public staff in international consultations and meetings to manage straddling and highly migratory fishes. For instance, in the Greenland SFPA, sectoral support is reported to have contributed to developing long-term management plans for several stocks, such as West Greenland shrimps and off-shore halibut and improving market access for Greenlandic seafood exports (DK MA). For Germany in particular, SFPAs should also contribute further to the development of the artisanal fisheries sector and food safety in partner countries. Support to the artisanal fisheries sector in Côte d'Ivoire by providing a container for fish storage using the SFPA public funds is a good example and similar supports could follow.

Without visibility about the outcomes of sectoral support, non-State EU actors and some EU MAs (such as the MA in the Netherlands), had difficulties in expressing views about the positive or negative impacts of sectoral support.

B3. Visibility / communication

¹³⁶ In terms of programming, results, and impacts.

EU stakeholders in general recommended that **the sectoral support activities be more visible and that communication to the public should be enhanced**. Some EU stakeholders recognised that public evaluation reports by independent experts are useful but, for most, this is not sufficient to communicate on the impacts of the sectoral support¹³⁷. Such visibility (and increased transparency) would also increase the SFPA acceptance in partner countries according to the stakeholders. In the EU stakeholders' views, visibility could be increased by using dedicated web pages with regular progress reports and press releases on the sectoral support implementation, with EU logos or similar visual tools on equipment/infrastructure funded through sectoral support.

For several EU operators, enhancing communication and the visibility of the SFPA and its sectoral support component is pivotal to respond to and limit misleading information. To many of the EU operators, public opinion, being in the EU or in partner countries, is ill-informed about the positive aspects of SFPAs. Some EU operators suggested that a percentage of the sectoral support funds should be used to communicate the benefits and opportunities of SFPAs, for the companies and people of the partner country in particular¹³⁸.

B4. Coherence with other interventions in the fisheries sector of third countries (question asked to EU MSs, and NGOs especially)

Some EU MSs believe that there is further potential to link SFPAs to other new tools, frameworks, and agreements, such as the Agreement on Port State Measures (PSMA), the Fisheries Transparency Initiative (FiTI) and the FAO guidelines on transshipment that are currently being developed (Germany).

Coherence is generally good with other EU instruments and EU MS instruments according to stakeholders: for instance with joint research projects between EU research institutions and SFPA partner countries' research institutions using EU FP7 and EU MS funds (GIZ). **However coordination could be enhanced in some countries** by using regular sectoral development meetings, and to take place at all levels¹³⁹ (see B1 for other EU MS's suggestions).

C. Other remarks received

With regards to SFPAs enabling **access to straddling stocks** in particular, **increasing scientific capacity and cooperation is recommended (by stakeholders) in neighbouring countries and at a regional level** (different partner MAs and EU operators). Also, dedicated science-industry research cooperation programmes are recommended to develop feasible technical solutions in the medium-long term (for instance to improve selectivity between catch of sardines and sardinellas in Mauritania).

According to the European Trade Federation representing EU seamen's rights, **the EU should ensure that the provisions of the social clause are fully implemented and monitored during the application of the agreements**. This implementation monitoring should be considered when the Agreement/Protocols are renewed, and should focus in particular on:

- Full transparency about the procedure for employment of local fishers, about conditions and pay before signing the contract, and on payments of salaries to local fishers;
- Full involvement of local trade unions in the process, including collective bargaining rights for the local fishers;
- Development of strict training systems on operations and safety for local fishers; and
- Free possibility for the local fishers to consult the local unions.

Also, for ETF, the fulfilment of these criteria is critical when concluding or renewing any SFPA / Protocol to an SFPA. Considering Directive (EU) 2017/159, which incorporates into EU law the social partners agreement on ILO C188, every SFPA should be an opportunity to encourage the third countries to fully implement the ILO Work in fishing convention.

II. Non-EU stakeholders' feedback – details

A. Contribution of SFPAs in general

A1. To the governance framework for the exploitation of resources in third

¹³⁷ For DK MA, the visibility of sectoral supports could also be enhanced by specific press releases and distribution of the SFPA evaluation reports to EU MS and advisory councils.

¹³⁸ For some EU operators' representatives, **communications on SFPAs should also be directed to the members of the EU Parliament (MEPs), and to some extent to EC staff**.

¹³⁹ Coordination improved by meetings of technical and financial partners (TFPs), of TFPs and the partner countries' public services, etc.; and by regularly inviting non-State actors when appropriate.

countries waters

Third countries' management authorities (partner MAs), stressed that **SFPAs have generally contributed to improving legal frameworks, strengthening capacity building in the administration in charge of fisheries management and control, and in the availability of scientific advice.** However, some issues regarding the effective implementation of the terms of the SFPAs (their Protocols) were also raised by some partner MAs. For instance, in Liberia when the SFPA was active, the minimum 15 % coverage of the EU fleet by observers designated by Liberia was not implemented because EU (purse seine) vessels did not provide such opportunities [note: all EU purse seine activities including those taking place in the Liberia's EEZ are subject to scientific observations (100% coverage)].

For non-State actors, SFPAs have contributed to improve fisheries governance in their countries by **improving transparency about access and promoting fishing activities and research in minimising impacts of the fishing sector on the environment and local fishing communities, but improvements are still needed (see suggestions below).**

A2. To the development of the third countries fishing sector

For partner MAs, SFPAs contributed to **interactions with the third countries' fishing sector in countries where EU vessel catches are landed and by supplying processing factories and local fish sellers;** for instance in Côte d'Ivoire. **However, for most partner MAs, these interactions should be increased or improved.**

For non-EU stakeholders, **SFPAs contribute to some extent to food safety in third countries** where parts of the fish caught by EU vessels are landed and sold in local markets (Côte d'Ivoire MA for instance) and also when relevant sectoral support was successful, such as the provision of ovens for artisanal fish smoking and support funds for women fish sellers' cooperatives. Recent success stories were also raised by the Moroccan and Mauritanian MAs, in relation to EU fishing companies targeting cooperation with small pelagic fishes and their local partners; fish are landed fresh by EU refrigerated sea water (RSW) vessel, frozen locally, and packaged and traded for human consumption. One RSW vessel is operating this way in Dakhla, and in Nouadhibou where the EU fishing company has stakes in the Mauritanian processing company handling its fish.

Non-State actors in countries (and some partners) where fish are not landed or where fish are in general transhipped in ports were more critical about the contribution of the SFPAs towards food security (for instance in Guinea-Bissau) **or in interacting with the local industry** (e.g. Mauritania). Some partners countries, such as Senegal, suggested that SFPAs should have a clause to oblige EU fishing fleets to contribute to supply local processing-trading companies with the aim to increase interactions with their fishing industries. A respondent from the Madagascar MA considered on the other hand that the economic benefits of the SFPA for Madagascar – the SFPA there being dormant at the date of the consultation – were not sufficient enough and should be improved by obliging all EU vessels to land and process their catches in Madagascar, by setting incentives for EU vessels to use local ancillary services (fuel, maintenance, etc.), and also by obliging EU vessels to use more national seamen and observers.

B. Sectoral support

B1. Identification and implementation of sectoral support measures

Generally, partner MAs consider that **sectoral support programmes are aligned with their national fisheries strategies.** In general, non-State actors had great difficulties in providing detailed views or opinions on the sector support measures in the absence of regular public information on the implementation and effectiveness of the sectoral support. They were also concerned about their lack of involvement in its implementation.

Representatives of non-State actors (including trade unions) and some representatives of partner MAs who responded, recommended that **non-State actors should be consulted¹⁴⁰ in the design of sectoral support and involved in coordinating and implementing actions.** Improvements in involving non-State actors in the negotiation were also stressed, for instance by the Moroccan MA

¹⁴⁰ For instance, in their views, regular discussions with the third countries' management authorities, the EU representatives, such as DG MARE, the fishing industry, and the civil society would be very useful to intervene in the fisheries sector, to enhance economic interactions of the EU-fleet with the third countries' fisheries industry, and to ensure that there are positive impacts on actors of the small-scale fishery products supply chain including women actors and.

which reported that SFPAs contributed to fishing associations being heard and listened¹⁴¹ to in developing the fisheries sector, by a women fishmonger association in Côte d'Ivoire for the 2018-2024 Protocol in Côte d'Ivoire, by non-State actors in Gambia in 2021.

Some interventions were also considered unsuccessful by partner MAs, such as: building a craft to control the port zone (due to vessel instability) in Côte d'Ivoire; and partial use by small-scale fishers of safety equipment – life jackets and geolocation kits - supplied by the sectoral support in Senegal. Also, while several partner MAs raised the positive results of sectoral support in helping them install and operate electronic reporting systems (ERS) in their fisheries monitoring centres, one MA (Liberia) was disappointed that the system was not operational at the end of the Protocol.

Some partner MAs suggested that sectoral support budgets should be implemented **in line with national budget cycles to facilitate fund disbursement each fiscal year**. For the Côte d'Ivoire MA, dates of annual meetings of the Joint committees should be scheduled accordingly. Another alternative would be to transfer the sectoral support funds twice by year and for payment not to be conditioned by a percentage of execution due to delays of payments between a Protocol signature and its implementation phase (Senegal MA). Part of the sectoral support funds targeting the small-scale fishery products supply chain could be planned and managed by the civil society associations to ensure increased effectiveness and better respond to the objective of poverty alleviation.

Some NGOs suggested that the sectoral support component **should be either removed from the SFP instrument** (resulting in a fisheries agreement on access terms only) **or, if kept within SFPAs, implemented by applying sector budget support (SBS) implementing-monitoring-reporting tools**, which are used by the EU DG INTPA to improve the effectiveness, visibility and transparency of sectoral support.

B2. Impacts

For partner MAs, sectoral support has had **positive impacts in particular on strengthening their fisheries surveillance, scientific and sanitary control capacities**. Some suggested that sectoral support should be more diversified and include other components such as the protection and conservation of marine areas (alike in Mauritania in the Banc d'Arguin National Park), the development of the aquaculture sector, or the blue economy more broadly.

However, many non-State actors complained about the **lack of regular information about sectoral support activities**, which prevented them from responding to the detailed questions on the positive / negative impacts of the sectoral support.

B3. Visibility / communication

Representatives of partner MAs who answered the questionnaire suggested that the **public visibility of the sectoral support activities and impacts should be enhanced** by using the internet (dedicated web sites or web pages) and social media, and by drafting and implementing communication plans. Drafting strategic communication plans could be discussed during Joint Committee meetings (according to the MA in Cote d'Ivoire and Senegal). In addition, radio communications and official ceremonies in collaboration with the EU Delegation Communication services could increase the visibility of sectoral support (Senegal MA). Creating a multi-stakeholder committee to monitor sectoral support activities and their implementation could also help to improve sectoral support visibility (Gambia non-State actors).

Some non-State actors indicated that better communication about sectoral support is also **necessary to ensure that the public in general and stakeholders themselves have a good understanding of EU fishing activities and EU support to the fisheries sector in the partner countries**. Such information would counter misinformation about EU fishing activities and sectoral support.

B4. Coordination/coherence with other interventions in the fisheries sector of third countries (question asked to partner MAs and NGOs especially)

In general, coherence is considered good but some partner MAs regret that sectoral interventions by different technical and financial partners **may lack adequate coordination**

¹⁴¹ The needs of non-State actors are also better considered in the new operating design of the sectoral support in Morocco by allocation of the sectoral support funds by region as set in the recent Protocol to the SFP in their views.

mechanisms, raising the risk of duplication initiatives¹⁴². This risk is **minimised in countries where regular round tables are held to coordinate interventions in the fisheries sector** (for instance in Senegal – Senegal MA). One NGO emphasised that these round tables can be efficient if or as long as they impact positively on the national political decisions and respond collectively to national economic, social, and environmental needs. One partner MA (GNB) stressed the **need of such coordination of interventions to reinforce the implementation of programmed actions in the event of insufficient funds being made available under sectoral support**. Funds from the sectoral support can indeed be limited and should be reinforced with other existing financial resources. This view was shared by the Madagascar MA.

C. Other remarks received

Trade unions who responded to the consultation requested **to be part of the negotiation and implementation of SFPAs** to ensure that terms related to non-EU seafarers working rights in the SFPAs are systematically in line with the ILO guidelines and conventions and effectively implemented. They also stressed that **training needs to seafarers, such as safety at sea but not exclusively, should be met through the sectoral support component**. Consulting them would enable the EU and non-EU managing authorities to better understand and meet their needs.

For the two **regional organisations that responded to the consultation** (COMHAFAT and FCWC), **involving RFBs** or any other regional institution operating in the area, such as CECAF, **in the negotiation process of any new SFPA or related Protocol would be advisable**. To them, there is no suggestion of granting them decision-making status, but rather a **consultative function**, capable of informing the parties to the agreement about the state of stocks and the impacts on fisheries resources. Involving RFBs would be likely to enhance regional cooperation in managing shared fisheries resources and develop the fisheries sector in the regions where several countries have active SFPAs (FCWC). Through this consultation, SFPAs would also gain in **transparency and legitimacy**, according to their views.

For the Moroccan and Seychelles MA, trade of fish caught by EU vessels and landed in partner countries should be improved by using the SFPA instruments to reduce delays in obtaining **catch certificates**¹⁴³ from the EU MS administrations in charge of controlling EU vessels supplying local processing companies. For the Seychelles MA, such issues should be monitored by the Joint Committee and raised with EU MS administrations.

Public consultation

The Public Consultation on the evaluation of SFPAs ran from 31 March 2021 to 23 June 2021. **Twenty-three** respondents participated in the Public Consultation, of whom **fifteen** (65%) also responded to the specialised questions. The 23 respondents represented 18 EU Member States (78%) and 5 (22%) non-EU countries (Cabo Verde, Iceland, Namibia, Senegal and Turkey) of which two (Cabo Verde and Senegal) are a partner country of the EU in the framework of an SFPA. 30% (7 out of 23) gave their contribution as EU citizens, and 26% (6 out of 23, including one non-EU) as Academic / Research institutions. The rest included Public Authorities (3 out of 23, all from EU Member States), Non-governmental organisations and Non-EU citizens (2 out of 23 each), and one contribution as Business association, Environmental organisation and other

A majority of contributors acknowledged the relevance of SFPAs to provide access for EU vessels to resources in third countries' waters (52% of respondents), to strengthen the fisheries governance framework in non-EU waters (87% of respondents), and to support developing capacities of coastal states to design and implement a sustainable fishery policy (95% of respondents). For most contributors (74%), SFPAs are a relevant policy tool to implement a dedicated partnership between the EU and third countries and to support the economic and social development of the fishing sector in the third countries. A fairly large majority of respondents (86%) confirmed that SFPAs are more likely to achieve positive results compared to direct access arrangements negotiated by EU shipowners.

¹⁴² A TFP having responded, the French development agency - AFD, suggested that bilateral progress meetings be held between the AFD agencies and the EU delegation staff. While, in general, AFD staff and DG MARE fisheries attachés are regularly exchanging to ensure coherence between their development projects and the sectoral support activities, such formalised bilateral meetings would enable a better definition and monitoring of the EU and AFD projects to ensure coordination of their activities in countries where AFD and SFPAs are active in the fisheries sector (Morocco, Mauritania, Madagascar, Senegal especially).

¹⁴³ Certificates in compliance with the EU regulation n° 1005/2008 establishing an EU system to fight IUU fishing.

A majority of respondents (70%) acknowledged that EU interventions through SFPAs contributed to implementing sustainable fishing practices in the waters of third countries to some extent. The main arguments supporting this view are the adequate framework of SFPAs to develop science-based management measures, the transparency elements of SFPAs and the reporting obligations imposed to EU vessels through the Protocols. However, some contributors raised the lack of impacts of SFPAs on the management framework of shared resources, a perceived non-application of SFPAs standards to other foreign fleets, and a lack of follow-up of utilisation of sectoral support funding by the partner third countries.

In terms of effectiveness, some contributors (40%) agreed that SFPAs have contributed to improve the fisheries governance framework in the waters of partner countries, particularly through the development of the capacities of the partner countries in monitoring, control and surveillance of fishing activities under their responsibilities, with positive impacts on combatting IUU fishing. A majority of respondents (54%) agreed that SFPAs are of mutual benefit to the EU and to the partner country. The extent to which SFPAs contributed to develop and support the necessary scientific and research institutions yielded a balanced opinion with 40% of respondents supporting the statement and 40% having a different view. On access limited to a surplus identified on the basis of the best scientific advice available, opinions were also balanced, with one-third of contributors sharing this view, one-third disagreeing and one-third expressing a neutral opinion or no opinion.

Most contributors (46%) supported the view that SFPAs contributed to reinforce international cooperation, with perceived positive results on the fight against IUU fishing at national and regional levels, but 40% disagreed.

A majority of respondents (60%) shared the opinion that fishing opportunities negotiated under SFPAs are commensurate with EU fleet interest. The extent to which the overall financial compensation for access to waters paid to partner countries is fair compared to fishing opportunities negotiated was found satisfactory by some contributors (27%), but challenged by a same number of contributors. A small majority of contributors (47%) suggested that the share of access fees paid by EU shipowners could be increased.

Most respondents (40%) had a neutral opinion on the impacts of the sectoral support on the sustainable socio-economic development of the partner countries. Other respondents acknowledged a positive contribution (20%) or a negative contribution (34%). Sectoral support activities may lack consistency with other EU policies (development, environment, foreign policy, etc.) in the partner countries for one-third of the respondents, and 20% expressed a different perception.

A large majority of respondents (80%) was in the opinion that there is not sufficient public information on activities implemented under the sectoral support component of SFPAs in partner countries. Opinions on the contribution of the sectoral support to a positive understanding of the EU intervention were balanced, but there was a consensus to recommend an improved communication.

For certain respondents, SFPAs brought a positive general contribution through the sustainable management framework provided incorporating science, research, monitoring and enforcement. For other respondents, a negative perception of impacts of SFPAs was underpinned by the failure to address environmental impacts of fishing and the perception of a primacy given to the economic interests of EU operators over the imperatives of sustainability.

Annex 17: List of entities approached in the framework of our targeted consultation programme

EU and international organisations

#	Type	Country	EU/TC	Group	Name	Answered (coloured)
1	PA	Denmark	EUMS	1	Danish Ministry of Food, Agriculture and Fisheries	
2	PA	Estonia	EUMS	1	Ministry of Environment, Fishery Resources Dept.	
3	PA	France	EUMS	1	Ministry of Agriculture and Food, Fisheries Directorate (DPMA)	
4	RO	France	EUMS	1	Research Institute for Development (IRD)	
5	PA	Germany	EUMS	1	Federal Ministry of Food and Agriculture, Management and Control of Sea Fisheries (unit 614)	
6	PA	Greece	EUMS	1	Ministry of Rural Dev. & Food - Directorate of Fisheries Policy & Dev. of Fishery Products - Dept. of CFP & CMO	
7	PA	Italy	EUMS	1	Ministry of Agriculture, Food and Forestry Policies, Directorate General for Maritime Fisheries and Aquaculture	
8	PA	Latvia	EUMS	1	Ministry of Agriculture, Fishery Department, Fishery Strategy Division	
9	PA	Lithuania	EUMS	1	Ministry of Agriculture, Fisheries Unit	
10	PA	Netherlands	EUMS	1	Ministry of Agriculture Nature and Food Quality, Fisheries Department	
11	PA	Poland	EUMS	1	Ministry of Maritime Affairs and Inland Navigation, Fisheries Department	
12	PA	Portugal	EUMS	1	DGRM - Directorate-General for Natural Resources, Security and Maritime Services - Division of External Resources	
13	PA	Spain	EUMS	1	MAPA – Ministry of Agriculture, Fisheries and Food, Dept. of International Fisheries Relations	
14	RO	Spain	EUMS	1	IEO - Spanish [Research] Institute of Oceanography	
15	PA	EEAS	EUINST	1	Fisheries Attaché Morocco, Gulf of Guinea	
16	PA	EEAS	EUINST	1	Fisheries Attaché Senegal, Cabo Verde, The Gambia, Guinea-Bissau	
17	PA	EEAS	EUINST	1	Fisheries Attaché Côte d'Ivoire and Kenya	
18	PA	EEAS	EUINST	1	Fisheries Attaché Madagascar, Mauritius, Seychelles, Mozambique and Comoros	
19	PA	EEAS	EUINST	1	Fisheries Attaché Mauritania and Liberia	
20	PA	EEAS	EUINST	1	Fisheries Attaché Pacific	
21	IA	Estonia	EUMS	2	Reyktal - Estonian fishing company	
22	IA	France	EUMS	2	Orthongel – French Producers organisation (PO) of frozen tropical tuna purse seine vessels	
23	IA	France - EU OR La Réunion	EUMS	2	ARIPA - Reunionese Interprofessional Association of Fishing and Aquaculture	
24	IA	Germany	EUMS	2	DFV - German Fisheries Association	
25	IA	Greece	EUMS	2	Anastaskis Seafood - fishing company [answered through the Greek EU MS]	

Evaluation and analysis of the Sustainable Fisheries Partnership Agreements (SFPAs) between the EU and third countries including an in-depth analysis of the sectoral support component of the SFPAs

#	Type	Country	EU/TC	Group	Name	Answered (coloured)
26	IA	International	EUMS	2	AIPCE - CEP (EU Fish Processors and Traders Association) and CEP (European Federation of National Organizations of Importers and Exporters of Fish)	
27	IA	International	EUMS	2	Europeche - association of national organisations of fishing enterprises in the EU	
28	TU	International	EUMS	2	ETF - European Transport Workers' Federation	
29	TU	International	EUMS	2	ITF - International Transport Workers' Federation	
30	IA	Italy	EUMS	2	Italfish - Individual company	
31	IA	Italy	EUMS	2	FEDERPESCA - fishers association	
32	IA	Italy	EUMS	2	FEDERCOOPESCA - fishers association	
33	IA	Netherlands	EUMS	2	PFA - Pelagic Freezer-trawler Association	
34	IA	Poland	EUMS	2	NAPO - North Atlantic Producers Organisation (PO)	
35	IA	Spain	EUMS	2	ARPOAN (member of ARVI) – ANAPA and ARPOAN merged in 2021 to become OPNAPA	Answered through OPNAPA
36	IA	Spain	EUMS	2	ARVI – Cooperative of fishing vessel owners in the Port of Vigo (members including the associations ANAMER, ANAVAR, ANAPA, and ARPOAN among others)	For ANAPA, see OPNAPA
37	IA	Spain	EUMS	2	ANACEF (PO) – Spanish PO representing demersal and small pelagic trawlers (Canary Islands)	
38	IA	Spain	EUMS	2	OPROMAR – Spanish PO - organisation of fresh fish producers of the port of Ria and Marin (Galicia)	
39	IA	Spain	EUMS	2	OPNAPA-88 - Organisation of national longline producers in the high seas (Vigo)	
40	IA	Spain	EUMS	2	ORPAGU – Spanish PO representing longliners (Galicia)	
41	IA	Spain	EUMS	2	OPPC-3 Spanish PO - organisation of producers of freezer vessels targeting cephalopods, merlucciids, and miscellaneous species	
42	IA	Spain	EUMS	2	ANABAC – Spanish Producers organisation (PO) of frozen tropical tuna purse seine vessels (Bermeo)	
43	IA	Spain	EUMS	2	Dakar Tuna – Organisation representing French and Spanish pole and line vessels based in Dakar (Bermeo)	
44	IA	Spain	EUMS	2	ORPAL - Longline Producers' Organisation (Corogne)	
45	IA	Spain	EUMS	2	OPAGAC - Spanish Producers organisation (PO) of frozen tropical tuna purse seine vessels (Madrid)	
46	IA	Spain	EUMS	2	OPP-07-LUGO Spanish PO of the the Lugo Province (Galicia)	
47	IA	Spain	EUMS	2	Cofradía – fishers association - San Ginés (Canary Islands)	
48	IA	Spain	EUMS	2	Cofradía – fishers association - de La Graciosa (Canary Islands)	
49	IA	Spain	EUMS	2	Cofradía – fishers association – Barbate (Andalusia)	
50	IA	Spain	EUMS	2	Cofradía – fishers association – Conil (Andalusia)	
51	IA	Spain	EUMS	2	Cepesca – Spanish fisheries confederation	
52	IA	Spain	EUMS	2	ANAMAR – National association of freezer fishing vessels (Andalusia)	

Evaluation and analysis of the Sustainable Fisheries Partnership Agreements (SFPAs) between the EU and third countries including an in-depth analysis of the sectoral support component of the SFPAs

#	Type	Country	EU/TC	Group	Name	Answered (coloured)
53	PA	Cabo Verde	EUINST	3	EU Delegation	
54	PA	Cook Islands	EUINST	3	EU Delegation for the Pacific	
55	PA	Côte d'Ivoire	EUINST	3	EU Delegation	
56	PA	France	EUMS	3	AFD - Fisheries Dept. - Central office	
57	PA	Gabon	EUINST	3	EU Delegation	
58	PA	Gambia (The)	EUINST	3	EU Delegation	
59	PA	Germany	EUMS	3	GIZ - <i>Deutsche Gesellschaft für Internationale Zusammenarbeit</i>	Answered through the Germany PA
60	PA	Guinea-Bissau	EUINST	3	EU Delegation	
61	NGO	International	NGO	3	The Nature Conservancy	
62	NGO	International	NGO	3	EBCD - European Bureau for Conservation and Development	
63	NGO	International	NGO	3	EJF - Environmental Justice Foundation	
64	NGO	International	NGO	3	WWF - European Policy Office	
65	NGO	International	NGO	3	CFFA - CAPE - <i>Coalition pour des Accords de Pêche Équitables</i>	
66	NGO	International	NGO	3	Birdlife	
67	NGO	International	NGO	3	Pew	
68	NGO	International	NGO	3	Oceana	
69	NGO	International	NGO	3	LDAC - Long Distance Advisory Council	
70	NGO	International	NGO	3	MAC - Market Advisory Council	
71	PA	Liberia	EUINST	3	EU Delegation	
72	PA	Madagascar	EUINST	3	EU Delegation	
73	PA	Mauritania	EUINST	3	EU Delegation	
74	PA	Mauritius	EUINST	3	EU Delegation	
75	PA	Morocco	EUINST	3	EU Delegation	
76	PA	São Tomé and Príncipe	EUINST	3	EU Delegation - Delegation of the EU to Gabon, São Tomé and Príncipe and CEEAC	
77	PA	Senegal	EUINST	3	EU Delegation	
78	PA	Seychelles	EUINST	3	EU Delegation - Delegation of the EU to the Republic of Mauritius and to the Republic of Seychelles	

Organisations in partner third countries

#	Type	Country	EU/TC	Group	Name	Answered (coloured)
1	PA	Cabo Verde	PTC	1	Ministry in charge of fisheries - <i>Ministério da Economia Marítima</i>	

Evaluation and analysis of the Sustainable Fisheries Partnership Agreements (SFPAs) between the EU and third countries including an in-depth analysis of the sectoral support component of the SFPAs

#	Type	Country	EU/TC	Group	Name	Answered (coloured)
2	PA	Cook Islands	PTC	1	Ministry of Marine Resources	
3	PA	Côte d'Ivoire	PTC	1	MIRAH - <i>Ministère des Ressources Animales et Halieutiques</i> , ministry in charge of fisheries	
4	PA	Gabon	PTC	1	Ministère de l'Agriculture, de l'Élevage, de la Pêche et de l'Alimentation	
5	PA	Gambia	PTC	1	Ministry of Fisheries , Water Resources and National Assembly Matters	
6	PA	Greenland	PTC	1	Ministry of Fisheries Hunting and Agriculture	
7	PA	Guinea-Bissau	PTC	1	<i>Ministério das Pescas</i> , Ministry of fisheries	
8	RO	Guinea-Bissau	PTC	1	INIPO - Scientific institute in Guinea-Bissau	
9	PA	Liberia	PTC	1	National Fisheries and Aquaculture Authority (NaFAA)	
10	PA	Madagascar	PTC	1	MAEP - <i>Ministère de l'agriculture, de l'élevage et de la pêche</i>	
11	PA	Mauritania	PTC	1	MPEM <i>Ministère de la pêche et de l'économie maritime</i> - through the unit 'DGERH'	
12	RO	Mauritania	PTC	1	IMROP - <i>Institut Mauritanien de Recherches Océanographiques et des Pêches</i>	
13	PA	Mauritius	PTC	1	Ministry of Blue Economy and Fisheries	
14	PA	Morocco	PTC	1	<i>Ministère de l'Agriculture, de la Pêche Maritime, du Développement Rural et des Eaux et Forêts, Département de la Pêche Maritime</i>	
15	RO	Morocco	PTC	1	INRH - <i>Institut national de recherche halieutique</i>	
16	PA	Sao Tome y Principe	PTC	1	Fisheries Directorate	
17	PA	Senegal	PTC	1	Ministry of fisheries and maritime economy, Maritime fisheries Directorate (<i>Direction de la pêche maritime</i>)	
18	RO	Senegal	PTC	1	CRODT - Centre de Recherches Océanographiques de Dakar-Thiaroye	
19	PA	Seychelles	PTC	1	Ministry of Fisheries and Blue Economy, Seychelles Fishing Authority (SFA)	
20	IA	Cabo Verde	PTC	2	APESC - Shipowners association	
21	IA	Cabo Verde	PTC	2	Artisanal Fishermen Association of S.Pedro	
22	IA	Cook Islands	PTC	2	Cook Islands Fishing Association	
23	IA	Côte d'Ivoire	PTC	2	SCEADCI SCOOPS - <i>Société Coopérative des Entrepreneurs Agricoles Dynamiques de Cote d'Ivoire, Société Coopérative Simplifiée</i>	
24	IA	Côte d'Ivoire	PTC	2	USCOFEP-CI - <i>Union des Sociétés Coopératives de Femmes dans la Pêche et assimilées de Côte d'Ivoire</i>	
25	IA	Côte d'Ivoire	PTC	2	UAPF - <i>Union des armateurs de pêche fraîche</i> (Côte d'Ivoire)	
26	IA	Côte d'Ivoire	PTC	2	FENASCOOP-CI – <i>Fédération nationale des sociétés coopératives de pêche et acteurs de la filière pêche en Côte d'Ivoire</i>	
27	IA	Côte d'Ivoire	PTC	2	UNSCOFEP-CI - member of FENASCOOP-CI (<u>note: UNSCOFEP-CI and USCOFEP-CI are different organisations</u>)	
28	IA	Côte d'Ivoire	PTC	2	USCAPA-CI – <i>Union des sociétés coopératives et des acteurs de la filière pêche en Côte d'Ivoire</i> (member of FENASCOOP-CI)	

Evaluation and analysis of the Sustainable Fisheries Partnership Agreements (SFPAs) between the EU and third countries including an in-depth analysis of the sectoral support component of the SFPAs

#	Type	Country	EU/TC	Group	Name	Answered (coloured)
29	IA	Côte d'Ivoire	PTC	2	FENASCOPECI – <i>Fédération nationale des sociétés coopératives de pêche en Côte d'Ivoire</i> (note: FENASCOOP-CI is a different organisation)	
30	TU	Côte d'Ivoire	PTC	2	SYMAPECI - <i>syndicat des marins pêcheurs de Côte d'Ivoire (membre de la GGSTCI (confédération générale syndicale des travailleurs de Côte d'Ivoire)</i>	
31	TU	Côte d'Ivoire	PTC	2	SYMICOMOOPPA – <i>syndicat des marins ivoiriens au commerce offshore, onshore, plongeurs, pêcheurs et assimilés</i>	
32	IA	Gabon	PTC	2	SAPEG - <i>Syndicat des Armateurs Industriels au Gabon</i>	
33	IA	Gabon	PTC	2	Union of women fishmongers	
34	IA	Gabon	PTC	2	Fishers cooperative	
35	IA	Gambia (The)	PTC	2	Consortium of Artisanal Fisheries Professional Organisations (National Ass. of Artisanal Fisheries Operators (NAAFO), ALL Artisanal Fisheries Cooperative Ass. (AFICOSA))	
36	IA	Gambia (The)	PTC	2	The Association of Gambian Fishing Companies (TAGFC)	
37	TU	Gambia (The)	PTC	2	Association of Gambian Sailors	
38	IA	Guinea-Bissau	PTC	2	ANAPA - <i>Association Nationale des Entreprises de Pêche</i>	
39	IA	Guinea-Bissau	PTC	2	ANEP - <i>Associação Nacional de Empresários de Pesca</i>	
40	IA	International	PTC	2	FPAOI - <i>Fédération des pêcheurs artisanaux de l'océan Indien</i>	
41	IA	Liberia	PTC	2	Liberian Artisanal Fishermen Association (LAFA)	
42	IA	Madagascar	PTC	2	<i>Réseau National des Femmes de la Pêche à Madagascar (RENAFEP MADA)</i>	
43	IA	Madagascar	PTC	2	GAPCM - <i>Groupement des Armateurs à la Pêche Crevettière de Madagascar</i>	
44	TU	Madagascar	PTC	2	SYGMMA - trade union (member of ITF)	
45	TU	Madagascar	PTC	2	FECTRAMA/FECMAMA (SEKRIMA) - FECTRAMA : <i>FE</i> dération Chrétienne des TRAnsports de Madagascar; FECMAMA : <i>FE</i> dération Chrétienne des MARins de Madagascar; SEKRIMA : <i>SE</i> ndika KRIsianina MALagasy ou <i>Confédération chrétienne des syndicats malgaches</i>	
46	IA	Mauritania	PTC	2	FNPA - <i>Fédération nationale de la pêche artisanale</i> national artisanal fisheries federation	
47	IA	Mauritania	PTC	2	FNP - <i>Fédération nationale des pêches</i> national fisheries federation	
48	IA	Mauritania	PTC	2	<i>Fédération de la pêche artisanale et côtière de Nouadhibou</i>	
49	IA	Mauritius	PTC	2	Mauritius Exporter Association (MEXA)	
50	IA	Mauritius	PTC	2	Federation of Sea Fishermen association	
51	TU	Mauritius	PTC	2	Federation of fishermen	
52	IA	Morocco	PTC	2	FCPM - Federation of maritime fisheries chambers <i>Fédération des chambres des pêches maritimes</i>	
53	IA	Morocco	PTC	2	CNPC - National confederation of coastal fisheries <i>Confédération Nationale de la Pêche Côtière</i>	
54	IA	Senegal	PTC	2	CAOPA African confederation of artisanal fisheries organisations	
55	IA	Senegal	PTC	2	GAIPES <i>Groupement des Armateurs et Industriels de le Pêche du Sénégal</i>	

Evaluation and analysis of the Sustainable Fisheries Partnership Agreements (SFPAs) between the EU and third countries including an in-depth analysis of the sectoral support component of the SFPAs

#	Type	Country	EU/TC	Group	Name	Answered (coloured)
56	IA	Senegal	PTC	2	UPAMES Employer's union of wholesalers and exporters of Senegal	
57	IA	Senegal	PTC	2	CONIPAS - <i>Conseil National Interprofessionnel de la Pêche Artisanale</i>	
58	TU	Senegal	PTC	2	UDTS - <i>Union Démocratique des Travailleurs du Sénégal</i>	
59	IA	Seychelles	PTC	2	Seychelles Fishing Boat Owners Association	
60	NGO	Cabo Verde	PTC	3	ADAD - <i>Associação para a Defesa do Ambiente e Desenvolvimento</i>	
61	NGO	Cabo Verde	PTC	3	Biosfera	
62	NGO	Cook Islands	PTC	3	Te Ipukarea Society	
63	NGO	Gambia	PTC	3	The National Fisheries Platform [views provided through the Consortium of Artisanal Fisheries Professional Organisations, The Gambia]	
64	NGO	Gambia	PTC	3	The National Sole fishery Co-management Committee (NASCOM) [views provided through the Consortium of Artisanal Fisheries Professional Organisations]	
65	NGO	Gambia	PTC	3	Gambian Artisanal Fisheries Development Agency (GAMFIDA)	
66	NGO	Guinea-Bissau	PTC	3	<i>Mouvement National de la Société Civile</i>	
67	IO	International	FTP	3	FAO - Headquarters	
68	IO	International	FTP	3	World Bank - Fisheries Dept. - Washington	
69	NGO	International	NGO	3	PRCM - Regional Partnership for Coastal and Marine Conservation	
70	NGO	International/Madagascar	NGO	3	Blue Ventures	
71	NGO	International	NGO	3	SANSAFA - Southern African Regional Non-State Platform in Fisheries and Aquaculture	
72	NGO	International	NGO	3	Bloom	
73	NGO	International	NGO	3	ICSF - International Collective in Support of Fishworkers	
74	NGO	International	NGO	3	African Women Fish Processors and Traders Network (AWFISHNET)	
75	PA	International	RFB	3	ATLAFCO - COMHAFAT - <i>Conférence Ministérielle sur la Coopération Halieutique entre les Etats Africains Riverains de l'Océan Atlantique</i>	
76	PA	International	RFB	3	FCWC - CPCO Fisheries Committee for the West Central Gulf of Guinea	
77	PA	International	RFB	3	African Union - AU IBAR	
78	PA	International	RFB	3	SRFC - CSRP Sub-regional Fisheries Commission (West Africa)	
79	NGO	International and Gabon	NGO	3	WCS – Wildlife Conservation Society	
80	PA	Japan	FTP	3	JICA - Japanese International Cooperation Agency (office in West Africa)	
81	NGO	Madagascar	PTC	3	Durrell – NGO continental fisheries	
82	NGO	Mauritania	PTC	3	Mauritanie 2000	
83	NGO	São Tomé and Príncipe	PTC	3	MARAPA	
84	NGO	São Tomé and Príncipe	PTC	3	FONG-São Tomé-et-Príncipe -Federação das ONG's em São Tomé e Príncipe	

#	Type	Country	EU/TC	Group	Name	Answered (coloured)
85	NGO	Several third countries	PTC	3	National networks of women in fisheries: CIV, MOR, MRT, SEN, LBR, GNB	

Legend:

PTC	Partner third country
EUMS	EU Member State
EUINST	EU institution
FTP	Financial and technical partner
RFB	Regional fisheries body

Type code

IA	Industry Association
PA	Public Authority
TU	Trade Union
NGO	Non-Governmental Organisation
IO	International Organisation
RO	Research organisation

Group of stakeholders – colour coding

1 Stakeholders in charge of the implementation of SFPAs

- DG MARE B3 and fisheries attachés in the third countries
- Competent authorities in the EU Member States in charge of the monitoring of the activities of their flag vessels using fishing opportunities negotiated
- Competent authorities in the partner third countries in charge of the implementation of the SFPAs
- Research institutes in the EU Member States and in the third countries involved in the joint scientific committees created under SFPAs

2 Stakeholders impacted by SFPAs

- Associations of shipowners utilising fishing opportunities available under SFPAs
- Associations representative of the fishing industry (capture and processing sectors) in the partner third countries
- Trade Unions representing fishers

3 Stakeholders having a stated interest in SFPAs

- Other Commission’s services within DG MARE (e.g. units B2 and B4) and within other Directorate General (*inter alia* DEVCO, EMPL, NEAR, TRADE and SANTE)
- Delegations of the European Union in the partner third countries

EU advisory councils (Long-Distance AC, Market AC)

Non-governmental organisations with a stated interest in SFPAs and in the development of the fisheries sector in the third countries

International donors active in the fisheries sector of partner coastal states either at national or at regional levels

Annex 18: Evaluation Question Matrix

RELEVANCE

Better Regulation tool # 47: Evaluation of relevance is intended to consider the relationship between the needs and problems the objectives of the intervention and hence touches on aspects of design

Criteria	EQ1
Relevance	To what extent is the intervention through SFPAs (still) relevant to contribute to the needs/objectives of the Common Fisheries Policy?
Rationale	SFPAs are expected to contribute the objectives of the objectives of the Common Fisheries Policy defined in Article 2 of Regulation (EU)1380/2013 and further detailed in Article 28 for the external strand of the CFP. In answering this question, we will therefore seek to provide evidence for the need supporting EU intervention through SFPAs, as well as investigate if interventions through SFPAs have adapted to evolving needs.

Judgment criteria		Indicators	Tools	Sources
JC 1.1	SPFAs are (still) needed to address the objectives of the CFP as far as third countries are concerned	Expert judgment based on the analysis of relevant policy documents and feedback from consultation	Documentary analysis Targeted consultations Public consultation	Literature / conclusions from international fora on governance issues EU policy documents
Feasibility / challenges				

Criteria	EQ2
Relevance	To what extent is the intervention through SFPAs (still) relevant to contribute to the needs of third countries?
Rationale	Third countries, particularly developing countries, need technical and financial assistance to enhance their governance framework through implementation of a national fisheries policy. Third countries also need the fishery sector to support economic growth, as well as ensuring food security of their population. In answering this question, we will therefore seek to identify the extent to which EU intervention through SFPAs (still) corresponds to the needs, as well as investigate if interventions through SFPAs have adapted to evolving needs.

Judgment criteria		Indicators	Tools	Sources
JC 2.1	Partner countries (still) need to align their fisheries management framework with international and regional standards	I2.1.1 Accession / ratification of major international agreements by coastal states I2.1.2 Level of compliance of coastal states with international obligations and recommendations	Documentary analysis Targeted consultations Public consultation	Literature / conclusions from international fora on governance issues EU policy documents RFMO reports

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JC 2.2	IUU fishing activities falling under the responsibility of partner countries (still) need to be combatted	I2.2.1 Proven or suspected occurrence of IUU fishing activities at national and (sub) regional levels	Documentary analysis Targeted consultations Public consultation	Ad-hoc studies on the magnitude / risks of IUU fishing
JC 2.3	Scientific advice in support of fisheries management (still) need to be reinforced	I.2.3.1 % of key commercial stocks in the waters of partner countries for which estimates of stock status are available	Documentary analysis Targeted consultation	RFMO and RFO reports Reports of the SFPA joint scientific committees Feedback from targeted consultation of scientific institutes
Feasibility / challenges		Consistent estimates of occurrence of IUU fishing may be difficult to find		

Criteria	EQ3
Relevance	To what extent is the intervention through SFPAs (still) relevant to satisfy the needs of the EU fishing sector?
Rationale	The EU intervention through SFPAs was underpinned by a need for the EU fishing fleet to obtain fishing opportunities in the waters under jurisdiction of coastal states. In answering this question, we will therefore seek to provide evidence for the need supporting EU intervention through SFPAs as well as investigate if the need still needs to be satisfied to support operational patterns of the EU fishing fleet.

Judgment criteria		Indicators	Tools	Sources
JC 3.1	EU fishing vessels need an access to resources in the waters of third country to maintain profitable activities	I3.1.1 EU catches in the waters of third countries vs EU total catches I3.1.2 Stakeholders' views confirm that fishing opportunities in the waters of third countries are needed to support deployment of their vessels	Documentary analysis Targeted consultations	DG MARE (catch data in waters of third countries) RFMO (catch data at regional levels) EUMOFA (total catches) Ex-post evaluations of SFPAs Feedback from targeted consultation of EU fishing operators
Feasibility / challenges		n/a		

Criteria	EQ4
Relevance	To what extent is the design of intervention through SFPAs appropriate to address the needs?
Rationale	The EU intervention through SFPAs considers two components: i) an access component defining fishing opportunities and technical conditions governing their utilisation and ii) a sectoral support component for implementation of activities supporting activities contributing to the implementation of the national sectoral policy. Financial assistance for sectoral support is decoupled from payments for fishing opportunities. In answering this question, we will therefore seek to provide evidence for the need to design the intervention in two decoupled components

Judgment criteria		Indicators	Tools	Sources
JC 4.1	The division of SFPAs intervention into two decoupled components (access and sectoral support) was appropriate to address the needs	Expert judgment based on the analysis of rationale for decoupled interventions	Documentary analysis Targeted consultations	EU regulations and policy documents Feedback from targeted consultations
Feasibility / challenges		n/a		

EFFECTIVENESS

Better Regulation tool # 47: Effectiveness considers how successful EU action has been in achieving or progressing towards its objectives

Criteria	EQ5
Effectiveness	To what extent was the intervention through SFPAs effective to promote sustainable fishing practices in the waters of the partner countries?
Rationale	An overarching obligation set out by the CFP Regulation is that EU fleets shall only catch surplus of the allowable catch on the basis of best scientific advice available. The CFP also imposes implementation of an ecosystem-based approach to fisheries management so as to ensure that negative impacts of fishing activities are minimised while promoting compliance and adherence to measures and recommendations issued by international organisations. In answering this question, we will seek to provide evidence of results obtained through SFPAs intervention in relation to these orientations supporting sustainable fishing practices in the waters of partner countries.

Judgment criteria		Indicators	Tools	Sources
JC 5.1	EU fishing fleets only have access to surplus resources in the waters of partner countries	15.1.1 % of stocks exploited by the EU fleets for which a surplus is available based on scientific evidences	Documentary analysis Targeted consultations Public consultation	Scientific reports (RFMOs, RFOs, joint scientific committees, ad-hoc studies) SFPAs ex-post evaluations Feedback from targeted consultation of scientific institutes Feedback from public consultation
JC 5.2	EU fishing fleets activities are aligned with the principle of ecosystem approach to fisheries management	15.2.1 Number of measures aiming at reducing the environmental impacts of EU fishing activities in the waters of partner countries	Documentary analysis Targeted consultations	Review of Protocols and minutes of the joint committees SFPAs ex-post evaluations Joint scientific committees reports Feedback from targeted consultation of scientific institutes

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JC 5.3	SFPAs measures applicable to EU fleet in the waters of the partner countries are aligned with measures and recommendations adopted by international organisations	Expert judgment based on the analysis of the level of alignment of SFPAs measures with rules and recommendations adopted by international organisations	Documentary analysis Targeted consultations	International organisation websites (e.g. UN, RFMOs) Review of Protocols SFPAs ex-post evaluations Feedback from targeted consultation of managing authorities
JC 5.4	There is a good level of compliance by the EU fleet with SFPAs measures governing fishing activities in the waters of the partner countries	15.4.1 Records of offences by EU vessels	Documentary analysis Targeted consultations	Review of minutes of the joint committees SFPAs ex-post evaluations Feedback from targeted consultation of managing authorities
Feasibility / challenges		n/a		

Criteria	EQ6
Effectiveness	To what extent was the intervention through SFPAs effective to contribute to strengthen capacities of partner countries to monitor and control fishing activities falling under their responsibilities?
Rationale	The CFP establishes that SFPAs should seek to improve partner states' capacity for monitoring, control and surveillance of fishing activities falling under their responsibilities as flag state, coastal state and port state. This objective is addressed mainly through the sectoral support component of SFPAs with funding of acquisition of modern control tools such as the electronic logbook, VMS, or patrol means, support of running costs and funding of capacity building for public authorities in the partner states. In addition, some protocols include specific provisions for enhanced cooperation between partner countries and the EU party in the field of MCS such as joint control operations

Judgment criteria		Indicators	Tools	Sources
JC 6.1	SFPAs promoted implementation of modern cost-effective tools for monitoring, control and surveillance of fishing activities	16.1.1 Number and value of MCS equipment funded under the sectoral support component of SFPAs 16.1.2 Number of partner countries implementing an Electronic Reporting System over time	Documentary analysis Targeted consultations	Review of minutes of the joint committees SFPAs ex-post evaluations Feedback from targeted consultation of managing authorities
JC 6.2	SFPAs supported capacity building of authorities of partner countries for monitoring, control and surveillance of fishing activities	16.2.1 Number and value of activities contributing to capacity building of partner countries' authorities	Documentary analysis Targeted consultations Public consultation	Review of Protocols and minutes of the joint committees Joint scientific committees reports SFPAs ex-post evaluations

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		16.2.2 Number of beneficiaries of capacity building initiatives implemented in partner countries		Feedback from targeted consultation of managing authorities Feedback from public consultation
Feasibility / challenges		n/a		

Criteria	EQ7
Effectiveness	To what extent was the intervention through SFPAs effective to contribute to strengthen technical and scientific capacities in support of fisheries management?
Rationale	The CFP establishes that SFPAs should seek to develop and support the necessary scientific and research institutions. This objectives is addressed through scientific data collection scheme implemented under the access and sectoral support components of SFPAs and funding under the sectoral support component of specific research programmes and equipment for stock assessment or impacts of fishing on the broader marine environment. SFPAs also include a specific framework for scientific cooperation which materialise for some SFPAs by annual meetings of joint scientific committees.

Judgment criteria		Indicators	Tools	Sources
JC 7.1	SFPAs enhanced scientific data collection schemes on fisheries under the responsibility of partner countries	17.1.1 Number and coverage of scientific observer schemes onboard EU vessels promoted by SFPAs 17.1.2 Number and value of scientific sampling scheme of landings in the partner countries supported by SFPAs 17.1.3 Adequacy between scientific data available and needs for scientific advice	Documentary analysis Targeted consultations Public consultation	Review of Protocols and minutes of the joint committees Joint scientific committees reports Reports of RFMOs scientific committees SFPAs ex-post evaluations Feedback from targeted consultation of scientific institutes
JC 7.2	SFPAs supported marine research capacities of partner countries	17.2.1 Number and value of activities funded under the sectoral support contributing to improve research capacities on fish stocks and the broader environment 17.2.2 Number of scientists of partner countries involved in the joint scientific committees	Documentary analysis Targeted consultations Public consultation	Review of Protocols and minutes of the joint committees Joint scientific committees reports SFPAs ex-post evaluations Feedback from targeted consultation of managing authorities Feedback from public consultation
Feasibility / challenges		n/a		

Criteria	EQ8
Effectiveness	To what extent was the intervention through SFPAs effective to contribute to the social and economic development of the fisheries sector in the partner countries?
Rationale	SFPAs consider provisions to foster economic interactions between the EU fleet and the fishing industry of the partner countries, such as employment of national seamen and observers or landings in the ports of the partner countries while seeking to avoid direct interactions at sea between the EU fleet and the fishing fleet of the partner countries. In addition, SFPAs include a provision to promote cooperation among economic operators and the civil society with objective of creating conditions favourable to the promotion of relations between enterprises of the two parties.

Judgment criteria		Indicators	Tools	Sources
JC 8.1	SFPAs measures contributed to mitigate direct fishing interactions between EU fleet and national fleets, particularly small-scale fleets	I8.1.1 Measures included in SFPAs to mitigate fishing interactions between the EU fleet and national fleets 1.8.1.2 Fishing operators confirm absence of interactions during fishing operations	Documentary analysis Targeted consultations	Review of Protocols and minutes of the joint committees Joint scientific committees reports SFPAs ex-post evaluations Feedback from targeted consultation of fishing operators in the EU and in partner countries
JC 8.2	SFPAs measures supported economic interactions between the EU fleet and the fisheries sector in the partner countries	I8.2.1 Number of partner countries' seamen employed on EU vessels I11.2 Utilisation of partner countries' ports by EU fishing vessels I8.2.2 Volumes of catch of EU fleet sold to enterprises of the partner countries I8.2.3 Distribution of added value between the EU and partner countries	Documentary analysis Targeted consultations Public consultation	Review of Protocols and minutes of the joint committees SFPAs ex-post evaluations Feedback from targeted consultations Feedback from public consultation
JC 8.3	SFPAs activities under the sectoral support benefited to fishing operators in the partner countries	I8.3.1 Number and value of activities funded under the sectoral support benefiting to operators in the fishing sector of partner countries I8.3.2 Number of operators ¹⁴⁴ in the fishing sector of partner countries having benefited from sectoral support activities	Documentary analysis Targeted consultations Public consultation	Review of Protocols and minutes of the joint committees SFPAs ex-post evaluations Feedback from targeted consultations Feedback from public consultation

¹⁴⁴ With disaggregation as practicable to capture beneficiaries of the artisanal sector and gender

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JC 8.4	SFPAs supported promotion of cooperation among economic operators and civil society	18.4.1 Number of initiatives implemented by the two parties to encourage cooperation among economic operators	Documentary analysis Targeted consultations	Review of Protocols and minutes of the joint committees SFPAs ex-post evaluations Feedback from targeted consultations
Feasibility / challenges		n/a		

Criteria	EQ9
Effectiveness	To what extent was the intervention through SFPAs effective to strengthen regional cooperation for fisheries management?
Rationale	SFPAs concluded with partner countries form coherent geographical networks, particularly in West Africa and in the South-West Indian Ocean. In answering this question, we will seek to provide evidence of impacts of SFPAs on regional cooperation at RFMO levels for the management of highly migratory species, and at sub-regional levels for the management of shared stocks of species not included in the management mandate of a RFMO.

Judgment criteria		Indicators	Tools	Sources
JC 9.1	SFPAs contributed to improve the level of cooperation of partner coastal states with relevant RFMOs	19.1.1 Level of compliance of coastal states with key RFMOs resolutions 1.9.1.2 Number of RFMOs statutory meetings attended by representatives of partner coastal states 1.9.1.3 Status of payment of statutory contributions to RFMOs by partner coastal states	Documentary analysis Targeted consultations Public consultation	Review of Protocols and minutes of the joint committees RFMOs reports Joint scientific committees reports SFPAs ex-post evaluations Feedback from targeted consultation of fishing operators in the EU and in partner countries
JC 9.2	SFPAs contributed to enhance the level of cooperation between partner coastal states for research and management of shared stocks.	19.2.1 Number of joint initiatives implemented by partner coastal states in support of management of shared stocks with SFPA financial support	Documentary analysis Targeted consultations Public consultation	Review of Protocols and minutes of the joint committees SFPAs ex-post evaluations Feedback from targeted consultations Feedback from public consultation
Feasibility / challenges		n/a		

Criteria	EQ10
Effectiveness	To what extent was the intervention through SFPAs effective to support activities of the EU fleet operating in external waters?

Rationale	One of the objectives of EU intervention through SFPAs is to support the deployment of an economically viable EU fishing fleet in external waters, including in the waters under jurisdiction of third countries. In answering this question, we will seek to provide evidence on the effectiveness of SFPAs to support operational activities of EU vessels in the waters of third countries.
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Judgment criteria		Indicators	Tools	Sources
JC 10.1	EU fleet used the fishing opportunities available to them under SFPAs	I10.1.1 Number of EU vessels having obtained a fishing authorisation under SFPAs I10.1.2 Catch obtained in the waters of third countries compared to total catch	Documentary analysis Targeted consultations	Fishing authorisation and catch data (DG MARE) SFPAs ex-post evaluations Feedback from targeted consultation of fishing operators in the EU
JC 10.2	SFPAs coverage and measures are consistent with operational patterns of the EU fleet	I10.2.1 Views of EU operators on the relevance of fishing opportunities and associated conditions negotiated I10.2.2 Number of third countries's fishing zone of interest for the EU fleet but not covered by a SFPAs	Documentary analysis Targeted consultations Public consultation	SFPAs ex-post evaluations Feedback from targeted consultation of fishing operators in the EU
Feasibility / challenges		n/a		

EFFICIENCY

Better Regulation tool # 47: Evaluation of efficiency considers the relationship between the resources used by an intervention and the changes generated by the intervention

Criteria	EQ11
Efficiency	To what extent were fishing opportunities negotiated commensurate with the interests of the EU fleet?
Rationale	Under SFPAs, a certain level of fishing opportunities is negotiated for the EU fleet determining in turn the amount of access payments to be paid from the EU budget. In answering this question, we will seek to provide evidence on the extent to which fishing opportunities negotiated were commensurate with the interests of the EU fleet.

Judgment criteria		Indicators	Tools	Sources
JC 11.1	Utilisation of fishing opportunities was aligned with levels negotiated under SFPAs	I11.1.1 % utilisation of fishing opportunities negotiated and evolution over time	Documentary analysis Targeted consultations	SFPAs ex-post evaluations Fishing authorisation and catch data (DG MARE)

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				Feedback from targeted consultation of fishing operators in the EU
Feasibility / challenges		n/a		

Criteria		EQ12		
Efficiency	To what extent did EU public investments in SFPAs provided value for money?			
Rationale	EU public investments in SFPAs are expected to generate social and economic returns for the EU and partner countries. In answering this question, we will seek to provide evidence on the extent to which EU investments in SFPAs generated economic value-added for the parties involved.			

Judgment criteria		Indicators	Tools	Sources
JC 12.1	EU public investments in SFPAs generated positive returns for the EU and for partner countries	I12.1.1 Economic value added generated by EU fishing fleet activities compared to EU public investment	Documentary analysis	SFPAs ex-post evaluations
Feasibility / challenges		n/a		

Criteria		EQ13		
Efficiency	To what extent were sectoral support envelopes aligned with absorption capacity of partner countries?			
Rationale	EU public investments in the sectoral support component of SFPAs is expected to be disbursed according to annual tranches, with EU payments based on results achieved. In answering this question, we will seek to provide evidence on the extent to which sectoral support tranches have been disbursed according to the agreed calendars. If it is not the case, this may suggest that sectoral support envelopes might not aligned with absorption capacity of partner countries. However, experience shows that delayed financial implementation may be explained by other factors that the answer to the question will try to identify.			

Judgment criteria		Indicators	Tools	Sources
JC 13.1	Sectoral support envelopes have been used by partner countries according to the calendar foreseen by SFPAs	I13.1.1 Date and % payment of the different tranches foreseen under sectoral support I13.1.2 % of sectoral support envelope unspent at the end of the Protocols	Documentary analysis Targeted consultations	Review of Protocols and minutes of the joint committees SFPAs ex-post evaluations MARE budget Feedback from targeted consultation of managing authorities
Feasibility / challenges		Some reasons for delayed payments may be difficult to elucidate		

COHERENCE

Better Regulation tool # 47: Evaluation of coherence involves looking at how well or not different actions work together

Criteria	EQ14
Coherence	To what extent was intervention through SFPAs coherent with the sectoral policies of partner countries?
Rationale	The sectoral support implemented under SFPAs is expected to support priorities identified by both parties to foster implementation of the national fisheries policy. In answering this question, we will seek to provide evidence of the level of alignment of sectoral support activities with priorities listed in partner countries' strategic policies for the fisheries and aquaculture sector.

Judgment criteria		Indicators	Tools	Sources
JC 14.1	there are no contradiction between SFPAs measures and activities on the one hand and sectoral fisheries policy of the partner countries on the other hand	I14.1.1 Views of stakeholders in the partner countries on the coherence and consistency between sectoral support activities and national priorities	Documentary analysis Targeted consultations	Review of Protocols and minutes of the joint committees SFPAs ex-post evaluations Feedback from targeted consultation of managing authorities and civil society
Feasibility / challenges		Perception of what is a priority may differ among stakeholders		

Criteria	EQ15
Coherence	To what extent was intervention through SFPAs coherent with other EU interventions under the Common Fisheries Policy?
Rationale	Under the CFP, the EU adopted specific instruments having an impact on third countries. The two main instruments are i) the IUU Regulation and ii) the SMEF Regulation. In answering this question, we will seek to provide evidence on the extent to which EU interventions under SFPAs do not contradict the objectives of these instruments, and if synergies may be identified

Judgment criteria		Indicators	Tools	Sources
JC 15.1	There is no contradiction/overlapping and there are synergies between SFPAs and the SMEF regulation	Expert judgment	Documentary analysis Targeted consultations of EU officials	Review of SMEFF regulation Review of Protocols Targeted consultations of EU officials
JC 15.2	There is no contradiction/overlapping and there are synergies between SFPAs and the IUU regulation	I.15.2.1 Records of pre-notification and notification of third countries under the IUU Regulation Expert judgment	Documentary analysis Targeted consultations	Review of IUU regulation and relevant information on its implementation Targeted consultations of EU officials and relevant NGOs
Feasibility / challenges		n/a		

Criteria	EQ16
Coherence	To what extent was intervention through SFPAs coherent with other EU interventions impacting third countries
Rationale	SFPAs are implemented in the context of third countries focused by other EU policies, including the development policy, the food safety and health policy, the EU policy for trade and investments, working standards. Interventions under SFPAs are also expected to be aligned with EU founding values such as human rights and democratic principles. Policy coherence for development is an overarching principle governing EU external actions. In answering this question, we will seek to provide evidence on the extent to which SFPAs interventions are consistent with other EU policy, and evidence of synergies created as appropriate. The answer will also seek to identify if appropriate mechanisms have been implemented to ensure consistency and coherence between SFPAs intervention, mainly through the sectoral support component of SFPAs and other EU interventions in the partner countries.

Judgment criteria		Indicators	Tools	Sources
JC 16.1	There is no contradiction / overlapping and there are synergies between SFPAs and the EU development policy	I16.1.1 Views of stakeholders on the coherence and consistency between SFPAs and development policy I16.1.2 Impacts of SFPAs in partner countries contributing to development	Documentary analysis Targeted consultations Public consultation	INTPA interventions relevant to fisheries in partner countries Answer to previous evaluation questions on social and economic impacts of SFPAs in partner countries SFPAs ex-post evaluations Targeted consultations of managing authorities Public consultation
JC 16.2	There is no contradiction / overlapping and there are synergies between SFPAs and EU policy for food safety and health	I16.2.1 Contribution of SFPAs to alignment of third countries' with EU SPS standards for export to the EU	Documentary analysis Targeted consultations	Review of Protocols and minutes of the joint committees SFPAs ex-post evaluations Targeted consultations of managing authorities
JC 16.3	There is no contradiction / overlapping and there are synergies between SFPAs and EU policy for trade and investments in the partner countries	I16.3.1 Views of stakeholders on the coherence and consistency between SFPAs and iEPA / EPA relevant to partner countries	Documentary analysis Targeted consultations	Review of Protocols and minutes of the joint committees SFPAs ex-post evaluations Targeted consultations of managing authorities
JC 16.4	There is no contradiction / overlapping and there are synergies between SFPAs and EU policy working standards in the fisheries sector	I16.4.1 Level of accession of third countries to international conventions relevant to working standards in the fisheries sector	Documentary analysis Targeted consultations	Website of International Labour Organisation Review of Protocols and minutes of the joint committees

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		I16.4.2 Number of complaints submitted by third country nationals employed on EU fishing vessels for non-compliance with SFPAs social clauses		SFPAs ex-post evaluations Targeted consultations of managing authorities and trade unions
JC 16.5	There is no contradiction / overlapping and there are synergies between SFPAs and EU founding values on human rights and democratic principles	I16.5.1 Presence / absence of relevant safeguard clauses in SFPAs I16.5.2 Number of SFPAs suspended / denounced as a result of non-respect of human rights and democratic principles by partner countries	Documentary analysis Targeted consultations	Review of Protocols and minutes of the joint committees Targeted consultations of EU authorities
JC 16.6	There are adequate coordination mechanisms implemented by the EU to ensure coherence between SFPAs intervention and other EU interventions	Expert judgement	Documentary analysis Targeted consultations	Review of Protocols and minutes of the joint committees Targeted consultations of relevant EU authorities
Feasibility / challenges		n/a		

Criteria	EQ17
Coherence	To what extent was intervention through SFPAs coherent with interventions implemented by other international donors?
Rationale	EU Member States, developed countries and other international organisations such as the World Bank may grant development aid to partner countries. In some cases, the third countries fishing sector receive support from different donors in addition to SFPAs support through the sectoral support component. In answering this question, we will seek to provide evidence on the extent to which the different interventions share the same priorities, and to identify what mechanisms have been implemented to ensure coherence and synergies between the different interventions.

Judgment criteria		Indicators	Tools	Sources
JC 17.1	There is no contradiction / overlapping and there are synergies between SFPAs and interventions of other international donors in the fisheries sector	I17.1.1 Views of stakeholders on the coherence and consistency between SFPAs and interventions by other donors in the fisheries sector I17.1.2 Number of formal mechanisms implemented to ensure consistency and synergies between SFPAs sectoral support activities and interventions by other donors	Documentary analysis Targeted consultations	National development agencies and international donors website SFPAs ex-post evaluations Targeted consultations of selected international donors and EU authorities

Feasibility / challenges	n/a
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EU ADDED-VALUE

Better Regulation tool # 47: EU added-value looks for changes which it can reasonably be argued are due to the EU intervention over and above what could reasonably have been expected from national actions by Member States

Criteria	EQ18
EU added value	What is the added value resulting from intervention through SFPAs compared to what could be achieved by other means by EU Member States and partner countries?
Rationale	EU interventions through SFPAs establish a legal, environmental, economic and social multiannual governance framework for fishing activities carried out by EU vessels in the waters of partner countries. SFPAs also create a platform for sectoral dialogue between the EU and partner countries with dedicated funding to support implementation of the partner countries' fisheries policy. In answering this question, we will seek to provide evidence on the extent to which EU intervention through SFPAs add value compared to interventions by EU Member States and partner countries.

Judgment criteria		Indicators	Tools	Sources
JC 18.1	Objectives of SFPAs could not be achieved solely by actions from EU Member States and partner countries	118.1.1 Expert judgment based on analysis of relevant policy documents and SFPAs evaluation reports and targeted consultations	Documentary analysis Targeted consultations Public consultation	EU policy documents SFPAs ex-post evaluations Targeted consultations of EU Member States and EU authorities
JC 18.2	Discontinuation of SFPAs would not provide similar levels of impacts for the EU party and for partner countries	118.1.1 Views of stakeholders on likely impacts of discontinuation of EU interventions through SFPAs	Documentary analysis Targeted consultations Public consultation	National development agencies and international donors website SFPAs ex-post evaluations Targeted consultations of selected international donors and EU authorities
Feasibility / challenges		n/a		

ACCEPTABILITY

Better Regulation tool # 47: To what extent can we observe changes in the perception of the intervention (positive or negative) by the targeted stakeholders and/or by the general public?

Criteria	EQ18
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Acceptability	To what extent stakeholders in the EU and in the partner countries accepted the EU intervention through SFPAs?
Rationale	The image of EU interventions through SFPAs have always been controversial as evidenced by numerous press or research articles. In answering this question, we will seek to provide evidence on the perception of the impacts of SFPAs by the stakeholders (businesses and civil society) in the EU and in the partner countries, whether positive or negative. The answer to this question will also try to identify the underlying factors underpinning perception of SFPAs impacts in the EU and in the partner countries.

Judgment criteria		Indicators	Tools	Sources
JC 19.1	EU civil society acknowledges positive impacts of intervention through SFPAs	I19.1.1 Perception of SFPAs impacts by EU stakeholders	Documentary analysis Targeted consultations Public consultation	EU policy documents SFPAs ex-post evaluations Targeted consultations of EU Member States and EU authorities
JC 19.2	Partner countries' civil society acknowledges positive impacts of intervention through SFPAs	I19.2.1 Perception of SFPAs impacts by stakeholders in the partner countries	Documentary analysis Targeted consultations Public consultation	National development agencies and international donors' website SFPAs ex-post evaluations Targeted consultations of selected international donors and EU authorities
JC 19.3	EU businesses in the fisheries sector acknowledges positive impacts of intervention through SFPAs	I19.3.1 Perception of SFPAs impacts by stakeholders in the partner countries	Documentary analysis Targeted consultations Public consultation	National development agencies and international donors' website SFPAs ex-post evaluations Targeted consultations of selected international donors and EU authorities
JC 19.4	Partner countries' businesses in the fisheries sector acknowledges positive impacts of intervention through SFPAs	I19.4.1 Perception of SFPAs impacts by stakeholders in the partner countries	Documentary analysis Targeted consultations Public consultation	National development agencies and international donors' website SFPAs ex-post evaluations Targeted consultations of selected international donors and EU authorities
Feasibility / challenges		n/a		

Annex 19: Fiches summarising information on context and SFPAs for the partner third countries

Country fiches – introduction

This introduction provides sources exploited to elaborate fiches for countries with active SFPAs covering the scoping period of this evaluation (from 2015 onwards). Some hyperlinks direct readers to examples for one covered country (e.g. a specific protocol). Information on the extraction method for the EU trade database are also included below. For each studied indicator, years of reference are stated in the fiche.

Background

[World Bank¹⁴⁵](#) and [UN](#) data

GDP provided in US dollars being the standard currency to present it

Marine fisheries sector – context

- National catches (capture in marine waters): FAO – Fisheries database [online query the total of catches represents the total of catches by species groups listed in the fiche only](#)
- Foreign fleets authorised in the third country’s waters: SFPA evaluation reports available on [EU bookshop](#) , otherwise source provided in the fiche
- Flag state cooperation with the EU to fight IUU fishing (in compliance with the EU related regulations): flag State notification to the EU in relation with the EU catch certification scheme - EUR-LEX [information from the Commission](#) version 19.03.21
 - Identification as non-cooperating country against IUU fishing within the last five years: DG MARE’s dedicated [web page](#) – ‘overview of IUU procedures’, see table below for main explanations of the procedures:

Pre-identified	Pre-identification revoked	Identified	Listed	Delisted
‘Yellow card’ The EU opens a formal dialogue with the country to improve its compliance	The country improves the situation → pre-identification removed	‘Red card’ Export of fish products to the EU from the country banned	Ban continues EU vessels not authorised to fish in the third country’s waters – EU vessels accessing them either through a SFPA (if one) or through direct authorisations	Dialogue that can lead to restore the export authorisation

Source - table above: [DG MARE publication, 10 Feb. 2021](#)

- Data on export of fishery products for human consumption to the EU:
 - Compliance with the EU seafood safety regulations: EUR-LEX [website \(Commission Implementing Regulation \(EU\) 2021/405 of 24 March 2021\)](#)
 - List of authorised establishments – situation on 06.06.2021: DG SANTE’s [website](#);
 - When applicable, [DG SANTE](#) audit reports – for instance, when the DG SANTE’s list is not up to date (case for Côte d’Ivoire)
 - Specific sources are provided in the fiche if the country has been banned to export to the EU in the last 5 years
- Trade of fish products exported by the third country to the EU28 in volume and value: EUROSTAT trade database query – [COMEXT](#)

Extraction method:

Group of products	Commercial nomenclature (CN)
Fishery products	CN03
Processed fish products (canned and preserved inc. loins*)	CN1604**
Processed shellfish products & other aquatic invertebrates	CN1605*** [line when occurrences]
Total of fish products	CN03 + CN1604 + CN 1605

¹⁴⁵ [UN statistical data](#) otherwise (e.g. Cook Islands)

*: such as tuna cans and loins; **: 'Prepared or preserved fish; caviar and caviar substitutes prepared from fish eggs'; *** such as crab, shrimp, oyster, mussel, cuttlefish, squid, sea cucumber, etc. ; NB: data for the year 2020, unavailable on COMEXT for EU28 at date of extraction (May 2021), data available only for EU-27, '-' as no export quantity recorded

- Accession / ratification of international binding agreements: UNCLOS [page](#) ('consolidated table'); FAO FISH LEX web [page](#) and FAO compliance agreement web [page](#) and FAO PSMA [page](#) on FAO Treaties [database](#) ; RFMOs websites: [ICCAT](#), [IOTC](#), [WCPFC](#), and [NAFO](#); ILO [page](#); IMO [page](#)
- Other key information (if any): SFPA evaluation reports, except stated otherwise in the fiche (e.g. third country fisheries administration specific web pages)

Overview of the SFPA

SFPAs and most recent Protocols (including legal information on extensions of Protocols) on [EUR-LEX](#) and SFPA evaluation reports, DG MARE's ACDR (Aggregated Catch Data Reporting) database; graphs provided: consultant's own elaboration; in some circumstances minutes of Joint committee meetings (e.g. Gabon), and feedback from targeted consultations with stakeholders

2020 EU catches are provisional data.

List of country fiches

Country fiches were prepared for the following partner third countries shown in alphabetic order. The fiches can be accessed directly by a control-click on the name of the partner third country.

[Cabo Verde](#)

[Cook Islands](#)

[Côte d'Ivoire](#)

[Gabon](#)

[Gambia \(The\)](#)

[Greenland](#)

[Guinea Bissau](#)

[Kiribati](#)

[Liberia](#)

[Madagascar](#)

[Mauritania](#)

[Mauritius](#)

[Morocco](#)

[São Tomé-et-Príncipe](#)

[Senegal](#)

[Seychelles](#)

CABO VERDE

Background

Background information	
Population (2019)	549 935
GDP per capita (2019, current USD)	3 604 USD
Least developed Country (yes/no)	No
Income group	Lower middle income

Marine fisheries sector – context

- **National catches (evolution over 5 years, t per year): Atlantic Ocean and adjacent seas**

Group of species	2015	2016	2017	2018	2019
Highly migratory fishes	32 436	22 640	13 949	20 344	12 951
Small pelagic fishes	-	-	-	-	-
Other (marine) fishes	5 264	4 722	4 720	6 218	4 108
Cephalopods	1	1	1	10	10
Crustaceans	4	0	10	7	2
Total	37 705	27 363	18 680	26 579	17 071

- **Access of foreign fleets to national waters:**

Group of fleets	Flag or group of States (ISO code), 2017 data
Tuna vessels	EU, West Africa (SEN), Asia (JPN), Latin and Central America (BLZ, CUW, PAN, SLV)
Non-tuna vessels	Absence of foreign industrial fleet

- **Cooperation with the EU to fight IUU fishing according to the EU regulation:**

Notification to the EU by the country of its competent authorities (yes/no)	Yes
Identified as non-cooperating country within the last 5 years (yes/no)	No (see table below)

Pre-identified ('yellow card')	Pre-identification revoked	Identified ('red card')	Listed	Delisted
NA	NA	NA	NA	NA

- **Authorisation to export fishery products for human consumption to the EU (in compliance with the EU seafood safety regulations):**

On the current list of third countries authorised to export (yes/no)	Yes (wild catch only)
Nr of <u>land-based</u> establishments authorised to export to the EU (year)	6 (2021)

- **Trade of fishery products exported to the EU28 (evolution over 5 years):**

Group of products - Quantity (t)	2015	2016	2017	2018	2019
Unprocessed fishery products	16 633	16 226	9 689	11 680	12 271
Processed fish products*	4 403	6 438	5 722	9 280	8 580
Total of fish products	21 036	22 664	15 411	20 960	20 851
Group of products – Value (kEUR)	2015	2016	2017	2018	2019
Unprocessed fishery products	21 025	26 124	20 442	23 258	25 388
Processed fish products*	22 521	31 877	30 332	52 073	44 091
Total of fish products	43 546	58 000	50 774	75 331	69 479

*: especially tuna cans

- **Accession / ratification of international binding agreements:**

UNCLOS 1982 - internationally in force since 1994	Yes (1987 - accession)
UNFSA 1995 - since 2002	No
FAO (high seas fishing vessel) compliance agreement- since 2003	Yes (2006 – acceptance)
PSMA - since 2016	Yes (2016 – accession)
RFMO membership (year)	ICCAT (1979)
ILO Convention C188 - since Nov. 2017	No
IMO STCW-F Convention - since 2012	No
Cape Town Agreement - not in force	No

- **Other key information (if any):** tuna processing (canning) in Cabo Verde supplied, among other sources, by EU tuna vessels

-

Overview of the SFPA

1-General Data

Dates	
SFPA in force since	20/03/2007
Latest protocol applicable from – to (duration in years)	20/05/2019 - 19/05/2024 (5 years)

- **Groups of species authorised to catch by the Protocol:**

Fishes	Molluscs	Shellfish
--------	----------	-----------

Highly migratory	Demersal	Small pelagic	Cephalopods	Crustaceans
X				

- **Annual financial contribution foreseen by the Protocol (in EUR):**

For the 3 rd year and onwards	Amount
EU public budget for access	400 000
EU shipowner's contribution for access (estimate*)	600 000
Subtotal access payments (A)	1 000 000
EU public budget for sectoral support (B)	350 000
Total (A+B)	1 350 000

* In the Protocol, based on a reference tonnage of 8 000 t of highly migratory species caught; note: not considered above, other costs to pay by vessel owners such as the annual fee per support vessel (EUR 3 500 per vessel / year) and the observer flat rate contribution to Cape Verde (EUR 200 per vessel per year)

2-Access component

- **Number of EU fishing possibilities by type and by year in the last four years:**

Fishing vessel type	2017*	2018*	2019	2020
Tuna vessels	71	71	69	69
Small pelagic trawlers	NA	NA	NA	NA
Other types of vessels	NA	NA	NA	NA
Total	71	71	69	69

Number of EU fishing authorisations taken by type and by year (same period)

Tuna vessels	45	43	40	38
Small pelagic trawlers	NA	NA	NA	NA
Other types of vessels	NA	NA	NA	NA
Total	45	43	40	38

* Previous Protocol

- **Total EU catch in the third country's waters (tonnes) in the last four years:**

	2017	2018	2019	2020
Highly migratory fishes	11 469	10 630	9 106	5 953
Small pelagic fishes	NA	NA	NA	NA
Other (marine) fishes	NA	NA	NA	NA
Cephalopods	NA	NA	NA	NA
Crustaceans	NA	NA	NA	NA
Total	11 469	10 630	9 106	5 953

- **Estimated first sale value of EU total catch (annual average, million EUR):**

Period	2018-2020
Annual average	10.9

• **Interactions with the national fishing sector:**

Employment of national seamen onboard EU vessels	Yes (compulsory)
Boarding of national scientific observers	No, situation in the Protocol 2014 - 2018 (presence of non-national observer through different observer programmes). Current Protocol requirement: observer to be designated by CPV except if an observer already on board through a compulsory observer programme
Landings / transhipping in national ports	Yes (voluntary)
Sales of catch to national processing industry	Yes (voluntary)

• **Distribution of economic value-added (in kEUR and in %) – annual average 2015-2017:** year 2017 based on provisional data at the date of the ex-post evaluation of the Protocol

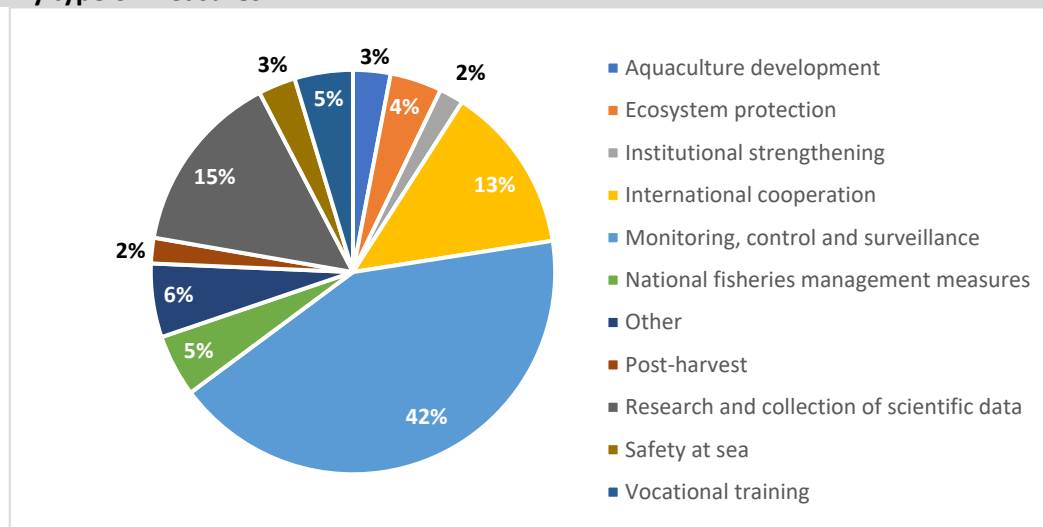
	EU	Partner country	Other entities	Total
Value	2 831	2 071	1 473	6 375
%	44 %	32 %	23 %	100 %

3-Sectoral support component

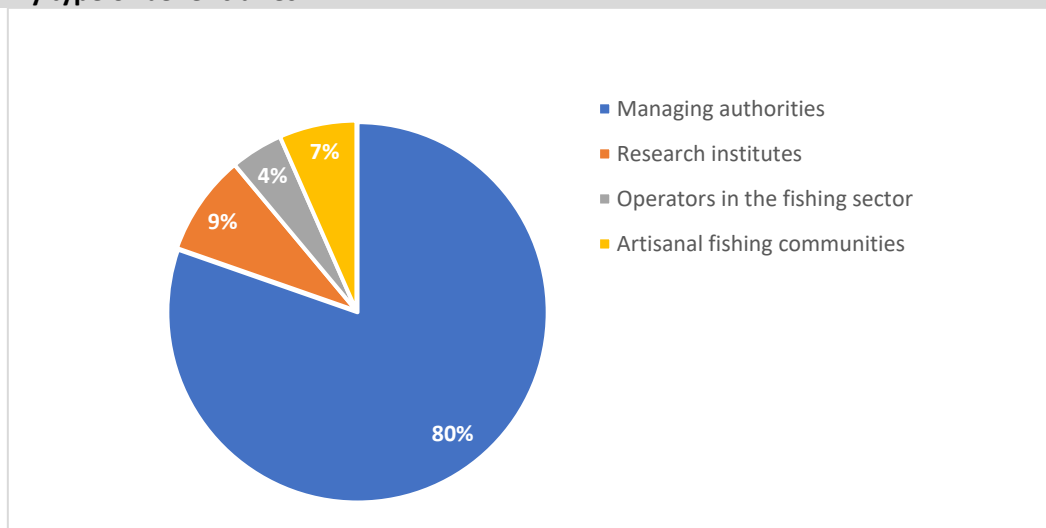
Total amount in EUR	
Previous Protocol (2014-2018)	1 050 000
Current Protocol (2019-2024)	1 750 000

• **Multiannual sectoral support programme (2014 – 2018)**

By type of measures



By type of beneficiaries



- **Selected activities implemented by the sectoral support programme (2014-2018)**

Activity

Monitoring Control and Surveillance

Cabo Verde prioritised sectoral support in the implementation of the NPOA against IUU fishing, which included the designing and implementing a new Vessel Monitoring System (VMS) to enable effective vessel tracking and to develop an Electronic Reporting System (ERS) to better ensure tuna vessels within the EEZ share data that can then be corroborated through targeted inspection. The catch certification system was also computerised, along with associated training of officers in these new systems.

Research and Collection of Scientific Data

Support was given to elaborate the strategic plan for scientific research in the fisheries sector, setting domestic fisheries research and ICCAT data requirements within a strategic research plan. Cabo Verde is an important nursery area for migratory sharks, such as blue shark. There are commercial fisheries associated with shark species, which require improved scientific information to inform management. There has also been the training of biologists and economists from DNEM and INDP on using the software of bioeconomic control.

Safety at Sea

The safety of artisanal fishers was strengthened through the acquisition and distribution of safety kits.

COOK ISLANDS

Background

Background information	
Population (2020)	18 000
GDP per capita (2018, current USD)	20 705 USD
Least developed Country (yes/no)	No
Income group	Upper middle income

Marine fisheries sector – context

- **National catches (evolution over 5 years, t per year): Pacific Ocean**

Group of species	2015	2016	2017	2018	2019
Highly migratory fishes	1 962	1 927	3 874	4 172	6 127
Small pelagic fishes	-	-	-	-	-
Other (marine) fishes	229	229	223	225	225
Cephalopods	-	-	-	-	-
Crustaceans	-	-	-	-	-
Total	2 191	2 156	4 097	4 397	6 352

- **Access of foreign fleets to national waters:**

Group of fleets	Flag or group of States (ISO code), 2018 data
Tuna vessels	EU, Pacific (KIR, NRU, USA, TUV, VUT), Asia (KOR)
Non-tuna vessels	Absence of foreign industrial fleet

- **Cooperation with the EU to fight IUU fishing according to the EU regulation:**

Notification to the EU by the country of its competent authorities (yes/no)	No
Identified as non-cooperating country within the last 5 years (yes/no)	No (table below)

Pre-identified ('yellow card')	Pre-identification revoked	Identified ('red card')	Listed	Delisted
NA	NA	NA	NA	NA

- **Authorisation to export fishery products for human consumption to the EU (in compliance with the EU seafood safety regulations):**

On the current list of third countries authorised to export (yes/no)	No
Nr of <u>land-based</u> establishments authorised to export to the EU	NA

- **Trade of fishery products exported to the EU28 (evolution over 5 years): NA**
- **Accession / ratification of international binding agreements:**

UNCLOS 1982 - internationally in force since 1994	1995
UNFSA 1995 - since 2002	1999 (accession)
FAO (high seas fishing vessel) compliance agreement- since 2003	2006
PSMA - since 2016	No
RFMO membership (year)	WCPFC (2004: entry into force)
ILO Convention C188 - since Nov. 2017	No
IMO STCW-F Convention - since 2012	No
Cape Town Agreement - not in force	Yes

- **Other key information (if any): -**

Overview of the SFPA

1-General Data

Dates	
SFPA in force since	14/06/2016
Latest protocol applicable from – to (duration in years)	14/10/2016 – 13/10/2021 (5 years)

- **Groups of species authorised to catch by the Protocol:**

	Fishes		Molluscs	Shellfish
	Highly migratory	Demersal	Small pelagic	Cephalopods
X				

- **Annual financial contribution foreseen by the Protocol (in EUR):**

For the 3 rd year and onwards	Amount
EU public budget for access	350 000
EU shipowner's contribution for access (estimate*)	490 000
Subtotal access payments (A)	840 000
EU public budget for sectoral support (B)	350 000
Total (A+B)	1 190 000

* consultant's estimate, based on a reference tonnage of 7 000 t of highly migratory species caught at EUR 70 / t caught; note: not considered above, any other costs paid by EU shipowners

2-Access component

- **Number of EU fishing possibilities by type and by year in the last four years:**

Fishing vessel type	2017	2018	2019	2020
Tuna vessels	4	4	4	4
Small pelagic trawlers	NA	NA	NA	NA
Other types of vessels	NA	NA	NA	NA
Total	4	4	4	4

Number of EU fishing authorisations taken by type and by year (same period)

Tuna vessels	2	2	2	3
Small pelagic trawlers	NA	NA	NA	NA
Other types of vessels	NA	NA	NA	NA
Total	2	2	2	3

- **Total EU catch in the third country's waters (tonnes) in the last four years:**

	2017	2018	2019	2020
Highly migratory fishes	668	2 210	2 933	1 226
Small pelagic fishes	NA	NA	NA	NA
Other (marine) fishes	NA	NA	NA	NA
Cephalopods	NA	NA	NA	NA
Crustaceans	NA	NA	NA	NA
Total	668	2 210	2 933	1 226

- **Estimated first sale value of EU total catch (annual average, million EUR):**

Period	2018-2020
Annual average	2.5

- **Interactions with the national fishing sector:**

Employment of national seamen onboard EU vessels	No (voluntary)
Boarding of national scientific observers	Yes (potentially through different observer programmes) Protocol requirement: 100 % purse seiner coverage in compliance with WCPFC standards, using observers co-recognised by WCPFC or IATTC
Landings / transshipping in national ports	No (voluntary)
Sales of catch to national processing industry	No(voluntary)

- **Distribution of economic value-added (in kEUR and in %) – annual average 2017-2018:**

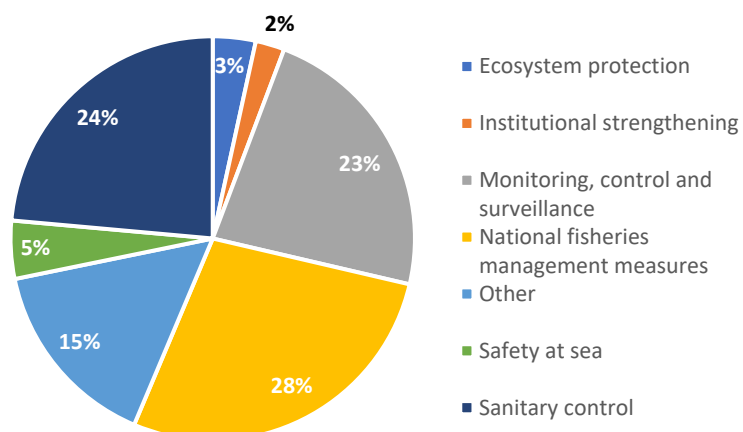
	EU	Partner country	Other entities	Total
Value	456	573	641	1 671
%	27 %	34 %	38 %	100 %

3-Sectoral support component

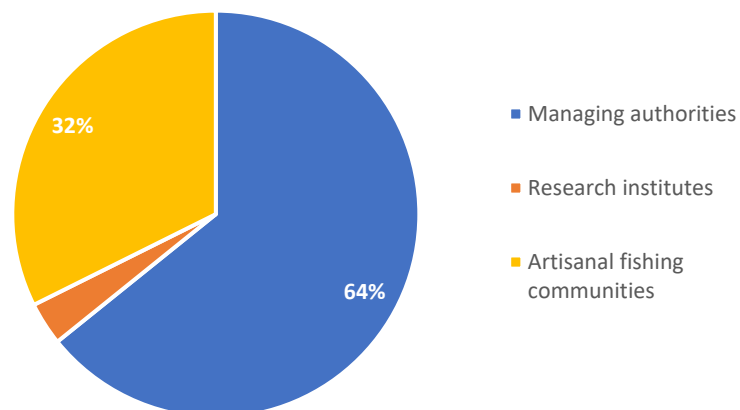
Total amount in EUR	
Previous Protocol	NA
Current Protocol (2016-2021)	1 750 000

- **Multiannual sectoral support programme**

By type of measures



By type of beneficiaries



- **Selected activities implemented by the sectoral support programme**

Activity

Monitoring, control and surveillance

Refurbished Fisheries Monitoring Centre operated by the Ministry of Marine Resources (MMR) and sectoral support for the deployment of an office based in Pago Pago (American Samoa) to control national industrial tuna vessels not calling in Rarotonga in line with requirements imposed to the flag State by international instruments.

Sanitary control

Refurbished laboratory facility for sanitary certification of fisheries products exported to Australia, New Zealand and Australia and training of inspectors.

Sea safety equipment for artisanal fishers

The sectoral support provided assistance to MMR to support and ensure the safety of artisanal fishermen on Rarotonga as well as in the Outer Islands with equipment such as Emergency Position indicating Radio Beacon (EPIRBS), life jackets, VHF radios and GPS units. The equipment was purchased and included in the kits distributed to Fishing Associations

National fisheries management measures

Implementation of a fuel subsidy scheme for artisanal fishermen to incentivise collection and reporting of information on catch and activities. By requiring artisanal fishers to register as fishers to apply for the fuel subsidy, in exchange they were to provide more regular catch and effort data using a reporting system that uses mobile phone internet applications, functional in remote island areas

CÔTE D'IVOIRE

Background

Background information	
Population (2019)	25.7 million
GDP per capita (2019, current USD)	2 276 USD
Least developed Country (yes/no)	No
Income group	Lower middle income

Marine fisheries sector – context

- **National catches (evolution over 5 years, t per year): Atlantic Ocean and adjacent seas**

Group of species	2015	2016	2017	2018	2019
Highly migratory fishes	1 566	2 497	14 276	16 922	17 387
Small pelagic fishes	21 661	23 967	21 968	18 916	18 916
Other (marine) fishes	32 012	35 420	21 102	37 341	36 420
Cephalopods	322	284	373	554	554
Crustaceans	953	722	314	662	662
Total	56 514	62 890	58 033	74 395	73 939

- **Access of foreign fleets to national waters:**

Group of fleets	Flag or group of States (ISO code), 2017 data
Tuna vessels	EU, West Africa (GHA, SEN), Central and Latin America (e.g. BLZ, CUW, GTM, SLV)
Non-tuna vessels	Absence of foreign industrial fleet

- **Cooperation with the EU to fight IUU fishing according to the EU regulation:**

Notification to the EU by the country of its competent authorities (yes/no)	Yes
Identified as non-cooperating country within the last 5 years (yes/no)	No (table below)

Pre-identified ('yellow card')	Pre-identification revoked	Identified ('red card')	Listed	Delisted
NA	NA	NA	NA	NA

- **Authorisation to export fishery products for human consumption to the EU (in compliance with the EU seafood safety regulations):**

On the current list of third countries authorised to export (yes/no)	Yes (wild catch only)
Nr of <u>land-based</u> establishments authorised to export to the EU	6 (year: 2019*)

*Number authorised by Côte d'Ivoire (DG SANTE audit report, cf. introduction of the country fiches)

- **Trade of fishery products exported to the EU28 (evolution over 5 years):**

Group of products - Quantity (t)	2015	2016	2017	2018	2019
Unprocessed fishery products	1 248	2 826	2 735	1 734	3 484
Processed fish products*	32 714	28 783	28 698	26 745	21 551
Total of fish products	33 963	31 609	31 433	28 479	25 035
Group of products – Value (kEUR)	2015	2016	2017	2018	2019
Unprocessed fishery products	4 128	9 676	9 184	7 468	11 382
Processed fish products*	125 889	116 806	129 786	125 400	95 652
Total of fish products	130 017	126 482	138 969	132 869	107 033

*: especially tuna cans

- **Accession / ratification of international binding agreements:**

UNCLOS 1982 - internationally in force since 1994	Yes (1984)
UNFSA 1995 - since 2002	No (1996 - signatory only)
FAO (high seas fishing vessel) compliance agreement- since 2003	No
PSMA - since 2016	Yes (2019 – accession)
RFMO membership (year)	ICCAT (1972)
ILO Convention C188 - since Nov. 2017	No
IMO STCW-F Convention - since 2012	No
Cape Town Agreement - not in force	No

- **Other key information (if any):** landing-processing country of regional EU and non-EU tuna purse seine catches due to presence of tuna canneries

Overview of the SFPA

1-General Data

Dates	
SFPA in force since	01/07/2007
Latest protocol applicable from – to (duration in years)	01/08/2018 - 31/07/2024 (6 years)

- **Groups of species authorised to catch by the Protocol:**

Fishes			Molluscs	Shellfish
Highly migratory	Demersal	Small pelagic	Cephalopods	Crustaceans
X				

- **Annual financial contribution foreseen by the Protocol (in EUR):**

For the 3 rd year and onwards	Amount
EU public budget for access	275 000
EU shipowner's contribution for access (estimate*)	330 400
Subtotal access payments (A)	605 400
EU public budget for sectoral support (B)	407 000
Total (A+B)	1 012 400

* In the Protocol, based on a reference tonnage of 5 500 t of highly migratory species caught; note: not considered above, other costs to be paid by EU shipowner such as additional observer flat-rate fee of EUR 400 per vessel per year ; fee per support vessel: EUR 3 500 per vessel / year

2-Access component

- **Number of EU fishing possibilities by type and by year in the last four years:**

Fishing vessel type	2017*	2018*	2019	2020
Tuna vessels	38	38	36	36
Small pelagic trawlers	NA	NA	NA	NA
Other types of vessels	NA	NA	NA	NA
Total	38	38	36	36

Number of EU fishing authorisations taken by type and by year (same period)

Tuna vessels	22	27	26	20
Small pelagic trawlers	NA	NA	NA	NA
Other types of vessels	NA	NA	NA	NA
Total	22	27	26	20

* Previous Protocol

- **Total EU catch in the third country's waters (tonnes) in the last four years:**

	2017	2018	2019	2020
Highly migratory fishes	1 881	4 133	3 322	2 760
Small pelagic fishes	NA	NA	NA	NA
Other (marine) fishes	NA	NA	NA	NA
Cephalopods	NA	NA	NA	NA
Crustaceans	NA	NA	NA	NA
Total	1 881	4 133	3 322	2 760

- **Estimated first sale value of EU total catch (annual average, million EUR):**

Period	2018-2020
Annual average	4.3

• **Interactions with the national fishing sector:**

Employment of national seamen onboard EU vessels	Yes (voluntary) Protocol requirement: min. 20 % ACP seamen
Boarding of national scientific observers	Yes (through different observer programmes) Protocol requirement: observers to be designated by Côte d'Ivoire
Landings / transhipping in national ports	Yes (voluntary)
Sales of catch to national processing industry	Yes(voluntary)

• **Distribution of economic value-added (in kEUR and in %) – annual average 2013-2016:**

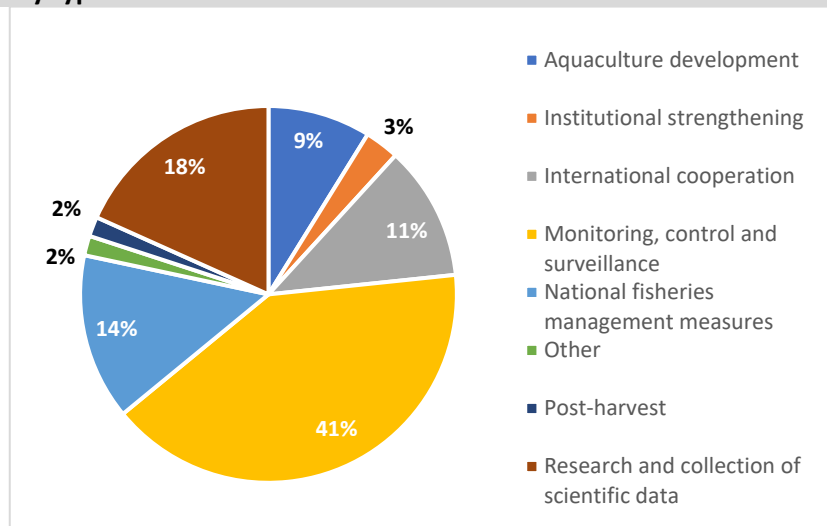
	EU	Partner country	Other entities	Total
Value	1 620	1 874	255	3 749
%	43 %	50 %	7 %	100 %

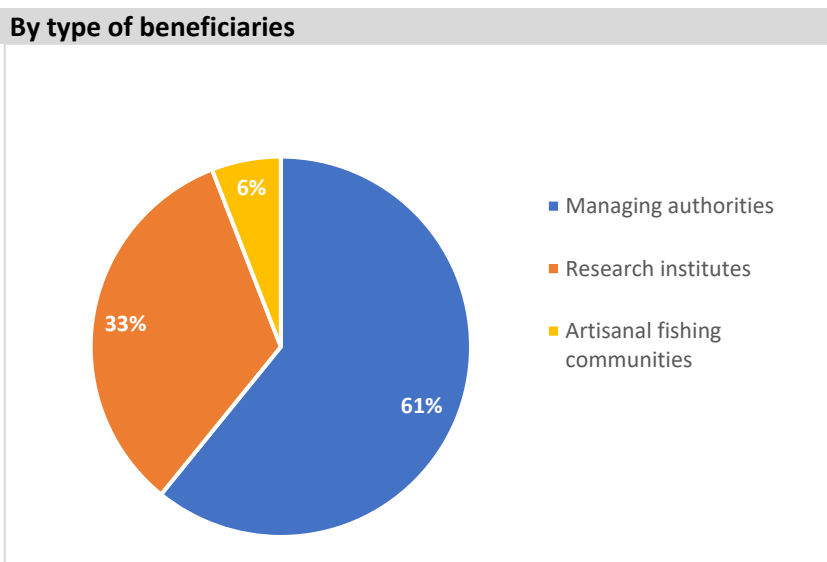
3-Sectoral support component

Total amount in EUR	
Previous Protocol (2013-2018)	1 287 500
Current Protocol (2018-2024)	2 332 000

• **Multiannual sectoral support programme**

By type of measures





- Selected activities implemented by the sectoral support programme

Activity
<p>Monitoring, control, and surveillance (MCS) The sectoral support targeted fisheries surveillance improvements as a priority. Several missions of joint surveillance at sea with public servants from the national navy and the Fisheries Directorate were carried out using the sectoral support funds. Vessel monitoring was improved by equipping national industrial fishing vessels and improving the head office of the fisheries monitoring centre (VMS cell). Practical trainings of fisheries inspectors were also carried by the European Commission services et the European Fisheries Control Agency (EFCA) The electronic reporting system (ERS) was almost operational by the end of 2017.</p>
<p>Research and collection of scientific data This component covered the financial support of scientific campaigns by trawls through a convention signed by the national oceanographic research institute (CRO) and the Fisheries Directorate.</p>
<p>National fisheries management measures A national action plan to fight IUU and a surveillance manual were drafted with the sectoral support funds.</p>
<p>International cooperation This component included financial support from the EU to cover the participation of Côte d'Ivoire to ICCAT key meetings each year and the ICCAT annual member fee.</p>
<p>Artisanal fishing communities Provision of a cold store container (August 2020) to an association of women fishmongers selling fish from San Pedro, 300 km away from Abidjan, to reduce the large number of fish not reaching the market due to a lack of storage facilities there.</p>

Note: Côte d'Ivoire implement a national fisheries programme (PAGDRH) to enhance the sustainable management of fisheries. The Programme is funded by public funds from Côte d'Ivoire, the sectoral support funds and funds coming from access rights paid by the EU, and the EU and non-EU shipowners.

GABON

(Provisional - the new Protocol 2021-2026 entered into provisional application on 29.6.2021)

Background

Background information	
Population (2019)	2.2 million
GDP per capita (2019, current USD)	7 767 USD
Least developed Country (yes/no)	No
Income group	Upper middle income

Marine fisheries sector – context

- **National catches (evolution over 5 years, t per year): Atlantic Ocean and adjacent seas**

Group of species	2015	2016	2017	2018	2019
Highly migratory fishes	126	114	102	102	102
Small pelagic fishes	9 204	8 370	7 531	7 531	7 531
Other (marine) fishes	11 932	10 841	9 757	9 757	9 757
Cephalopods	424	387	349	349	349
Crustaceans	273	251	228	228	228
Total	21 959	19 963	17 967	17 967	17 967

NB: all figures are FAO estimates

- **Access of foreign fleets to national waters: 2017 situation, when the SFPA was dormant**

Group of fleets	Flag or group of States (ISO code), 2017 data*
Tuna vessels	Central and South America (CUW, PAN, GTM, SLV, BLZ); West Africa (CPV)
Non-tuna vessels	Absence of foreign industrial fleet

*Source: ANPA from [NDJAMBOU et al., 2020](#)

- **Cooperation with the EU to fight IUU fishing according to the EU regulation:**

Notification to the EU by the country of its competent authorities (yes/no)	Yes
Identified as non-cooperating country within the last 5 years (yes/no)	No (see table below)

Pre-identified ('yellow card')	Pre-identification revoked	Identified ('red card')	Listed	Delisted
NA	NA	NA	NA	NA

- **Authorisation to export fishery products for human consumption to the EU (in compliance with the EU seafood safety regulations):**

On the current list of third countries authorised to export (yes/no)	Yes (wild catch only)
Nr of <u>land-based</u> establishments authorised to export to the EU (year)	1 (2009* and onwards)

* Latest modification on DG SANTE's website

- **Trade of fishery products exported to the EU28 (evolution over 5 years):**

Group of products - Quantity (t)	2015	2016	2017	2018	2019
Unprocessed fishery products	-	19	88	59	23
Processed fish products	-	-	-	-	-
Total of fish products	-	19	88	59	23
Group of products – Value (kEUR)	2015	2016	2017	2018	2019
Unprocessed fishery products	-	247	774	522	179
Processed fish products	-	-	-	-	-
Total of fish products	-	247	774	522	179

- **Accession / ratification of international binding agreements:**

UNCLOS 1982 - internationally in force since 1994	Yes (1998)
UNFSA 1995 - since 2002	No (1996 – signatory only)
FAO (high seas fishing vessel) compliance agreement- since 2003	No
PSMA - since 2016	Yes (2013 – acceptance)
RFMO membership (year)	ICCAT (1977)
ILO Convention C188 - since Nov. 2017	No
IMO STCW-F Convention - since 2012	No
Cape Town Agreement - not in force	No

- **Other key information (if any):** fishing zone of importance in Central Africa for EU purse seine vessels, absence of a tuna canning industry operating in Gabon to date, EU vessels historically landing their catches from Gabonese waters in countries with a tuna canning industry (Côte d'Ivoire and Ghana especially)

Overview of the SFPA

1-General Data

Potential future Protocol 2021 - 2026

Dates	
SFPA in force since	26.04.2007
Latest protocol applicable from – to (duration in years)	29.06.2021 - 28.06.2026 (5 years)

- **Groups of species authorised to catch by the Protocol:**

Fishes			Molluscs	Shellfish
Highly migratory	Demersal	Small pelagic	Cephalopods	Crustaceans
X				p.m. exploratory*)

* Total allowable catch (TAC) to be determined by the Joint Committee

• **Annual financial contribution foreseen by the Protocol (in EUR):**

	Amount
EU public budget for access	1 600 000
EU shipowner's contribution for access (estimate*) – highly migratory vessels	2 560 000
EU shipowner's contribution for access – shrimpers	p.m. **
Subtotal access payments (A)	4 160 000
EU public budget for sectoral support (B)	1 000 000
Total (A+B)	5 160 000

* in the Protocol, based on a reference tonnage of 32 000 t of highly migratory species caught by year and 80 EUR per tonne from 1 January 2022 and onwards - 75 EUR by tonne caught in 2021; note: not considered above, other costs such as additional observer flat-rate fee of EUR 2 500 per vessel per year; fee per support vessel for purse seiners: EUR 7 500 per vessel / year (maximum 4 support vessels per year)

** to be decided by the Joint Committee (see previous table)

2-Access component

Previous protocol expired on 23.7.2016: exclusivity clause applied up to the new Protocol implementation data therefore absence of vessels since 24 July 2016

• **Number of EU fishing possibilities by type and by year in the last four years:**
NA -

Fishing vessel type	2017	2018	2019	2020
Tuna vessels	NA	NA	NA	NA
Small pelagic trawlers	NA	NA	NA	NA
Other types of vessels	NA	NA	NA	NA
Total	NA	NA	NA	NA

Number of EU fishing authorisations taken by type and by year (same period): NA

• **Total EU catch in the third country's waters (tonnes) in the last four years:**
NA

• **Estimated first sale value of EU total catch (annual average, million EUR):** NA

• **Interactions with the national fishing sector: terms of the new Protocol only**

Employment of national seamen onboard EU vessels	Compulsory for purse seiners Protocol requirement: 6 Gabonese seafarers minimum in 2021, 8 in 2022, 10 the following years otherwise EUR 25 / d by vessel in the Gabon's waters for each Gabonese seafarers not boarded
--	--

Boarding of national scientific observers	Compulsory for purse seiners and their support vessels Protocol requirement: through a national observer programme - observers designated by Gabon. Otherwise report of an observer on board from other observer programmes to be transmitted to Gabon
Landings / transshipping in national ports	Transshipment in national port: compulsory with conditions Landings: compulsory for bycatch with conditions Protocol requirement: incentives in compliance with the Gabonese legislation to encourage vessels to land in Gabon, provided that the financial and commercial conditions of the market are met and in full compliance with commercial negotiations between operators and conditions agreed , a minimum of 30 % of the catches to be transhipped in a Gabonese port with 100 % of the by-catch kept on board at the time of transshipment to be landed
Sales of catch to national processing industry	Voluntary Protocol requirement: Gabon shall establish incentive schemes to benefit operators, in accordance with its national legislation

• **Distribution of economic value-added (in kEUR and in %) – year 2014:**

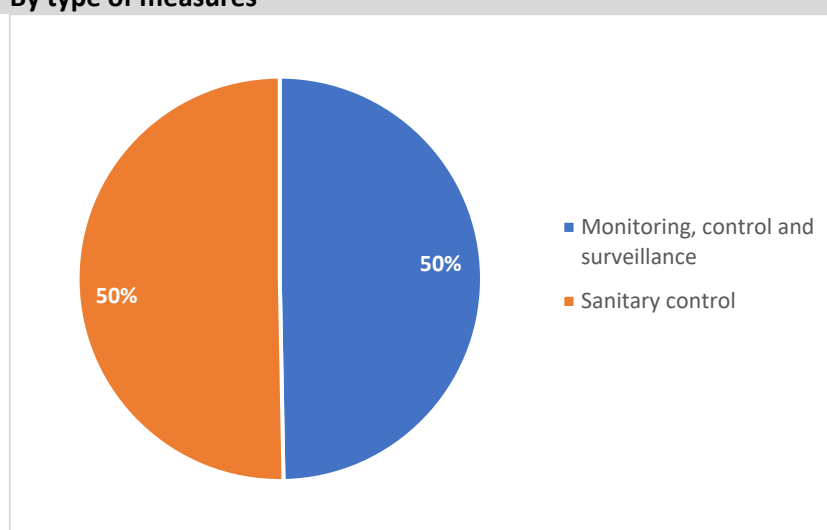
	EU	Partner country	Other entities	Total
Value	5 623	1 437	6 699	13 759
%	41 %	10 %	49 %	100 %

3-Sectoral support component

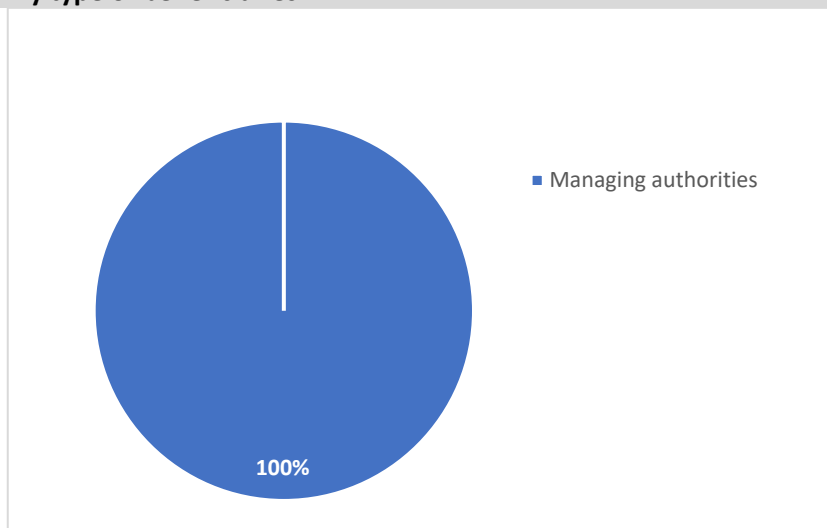
Total amount in EUR	
Previous Protocol (2013-2016)	1 350 000
Current* Protocol (2021-2026) * <i>not in force yet</i>	5 000 000

• **Multiannual sectoral support programme (previous Protocol)**

By type of measures



By type of beneficiaries



- **Selected activities implemented by the sectoral support programme (Previous Protocol)**

Activity

Monitoring, Control and Surveillance (MCS)

The sectoral support contributed to the creation and operation of the National Agency for Fisheries and Aquaculture (ANPA) in charge among other tasks of the operational fisheries surveillance activities, attributions which were previously under the responsibility of the Fisheries Directorate (DGPA). ANPA was created in October 2014. The support included in particular co-funding the ANPA infrastructure; acquisition of software for remote vessel monitoring including an ERS software for the Fisheries monitoring Centre, purchase; and maintenance and repair of surveillance equipment (vehicles and boats) used by the Fisheries inspection services.

Sanitary Control

Initially, the sectoral support included funds to carry out activities to strengthen sanitary controls of fish products. These budgets were reallocated to strengthen MCS activities.

GAMBIA (THE)

Background

Background information	
Population (2019)	2.3 million
GDP per capita (2019, current USD)	778 USD
Least developed Country (yes/no)	Yes
Income group	Low income

Marine fisheries sector – context

- **National catches (evolution over 5 years, t per year): Atlantic Ocean and adjacent seas**

Group of species	2015	2016	2017	2018	2019
Highly migratory fishes	0	46	10	7	0
Small pelagic fishes	25 531	30 400	42 765	27 968	28 075
Other (marine) fishes	23 247	22 774	14 479	17 910	23 089
Cephalopods	579	740	483	477	732
Crustaceans	3 194	1 378	1 271	1 408	1 558
Total	52 551	55 338	59 008	47 770	53 454

- **Access of foreign fleets to national waters:**

Group of fleets	Flag or group of States (ISO code), Jan. 2018 data for non-EU vessels
Tuna vessels	EU (through the SFPA in force since July 2019*), West Africa (SEN),
Non-tuna vessels	EU (through the SFPA in force since July 2019*), West Africa (SEN), Asia (CHN)

* From 1996 to 30/07/2019, a dormant EU fisheries agreement with an exclusivity clause applied

- **Cooperation with the EU to fight IUU fishing according to the EU regulation:**

Notification to the EU by the country of its competent authorities (yes/no)	Yes
Identified as non-cooperating country within the last 5 years (yes/no)	No (see table below)

Pre-identified ('yellow card')	Pre-identification revoked	Identified ('red card')	Listed	Delisted
NA	NA	NA	NA	NA

- **Authorisation to export fishery products for human consumption to the EU (in compliance with the EU seafood safety regulations):**

On the current list of third countries authorised to export (yes/no)	Yes (wild catch only)
Nr of <u>land-based</u> establishments authorised to export to the EU (year)	7 (2021)

- **Trade of fishery products exported to the EU28 (evolution over 5 years):**

Group of products - Quantity (t)	2015	2016	2017	2018	2019
Unprocessed fishery products	947	649	930	1 075	975
Processed fish products	-	-	-	25	25
Total of fish products	947	649	930	1 099	1 000
Group of products – Value (kEUR)	2015	2016	2017	2018	2019
Unprocessed fishery products	4 084	2 927	5 123	6 203	5 325
Processed fish products	-	-	-	96	125
Total of fish products	4 084	2 927	5 123	6 299	5 450

- **Accession / ratification of international binding agreements:**

UNCLOS 1982 - internationally in force since 1994	Yes (1984)
UNFSA 1995 - since 2002	No
FAO (high seas fishing vessel) compliance agreement- since 2003	No
PSMA - since 2016	Yes (2016 – accession)
RFMO membership (year)	ICCAT (2019)
ILO Convention C188 - since Nov. 2017	No
IMO STCW-F Convention - since 2012	Yes
Cape Town Agreement - not in force	No

- **Other key information (if any):** a dormant EU fisheries agreement from 1996 to 2019 with an exclusivity clause applied

Overview of the SFPA

1-General Data

Dates	
SFPA in force since	31/07/2019
Latest protocol applicable from – to (duration in years)	31/07/2019 – 30/07/2025 (6 years)

- **Groups of species authorised to catch by the Protocol:**

	Fishes		Molluscs	Shellfish
Highly migratory	Demersal	Small pelagic	Cephalopods	Crustaceans
X	X*			

* Limited to deep-water hake and associated species as by-catch

- **Annual financial contribution foreseen by the Protocol (in EUR):**

	Amount
EU public budget for access*	275 000
EU shipowner's contribution for access (estimate*)	315 000
Subtotal access payments (A)	590 000
EU public budget for sectoral support (B)	275 000
Total (A+B)	865 000

* Based on a reference tonnage of 3 300 t of highly migratory species caught by year

** Estimate provided in the Protocol

2-Access component

Reminder: from 1996 to 30/07/2019, a dormant EU fisheries agreement with an exclusivity clause applied

- **Number of EU fishing possibilities by type and by year in the last four years:**

Fishing vessel type	2017	2018	2019	2020
Tuna vessels	NA	NA	38	38
Small pelagic trawlers	NA	NA	NA	NA
Other types of vessels	NA	NA	12*	12*
Total	NA	NA	50	50

* *Maximum 3 vessels authorised to be active at the same moment*

Number of EU fishing authorisations taken by type and by year (same period)

Tuna vessels	NA	NA	21	20
Small pelagic trawlers	NA	NA	NA	NA
Other types of vessels	NA	NA	3	4
Total	NA	NA	24	24

- **Total EU catch in the third country's waters (tonnes) in the last four years:**

	2017	2018	2019	2020
Highly migratory fishes	NA	NA	2	30
Small pelagic fishes	NA	NA	NA	NA
Other (marine) fishes	NA	NA	743	489
Cephalopods	NA	NA	26	2
Crustaceans	NA	NA	3	1
Total	NA	NA	774	522

- **Estimated first sale value of EU total catch (annual average, million EUR):**

Period	2019-2020
Annual average	1.1

- **Interactions with the national fishing sector*:**

Employment of national seamen onboard EU vessels	For demersal EU trawlers: Yes (compulsory) Protocol requirements: at least 20 % from the Gambia; for tuna vessels, at least 20 % of the seamen signed on during the tuna-fishing season in the Gambian fishing zone shall be from The Gambia or alternatively from an ACP country; demersal trawlers,
Boarding of national scientific observers	For demersal EU trawlers: Yes (compulsory – protocol requirement) For EU tuna vessels - protocol requirement: until a new ICCAT Regional Observer Programme becomes operational, the following provisions on observers shall apply, a maximum of 15 % of authorised EU tuna vessels with an observer on board, vessels designated by The Gambia, which is endeavoured not to designate observers for EU tuna vessels which already have an observer on board from other observer programmes.
Landings / transhipping in national ports	No (voluntary)
Sales of catch to national processing industry	No (voluntary)

* Ex-post evaluation of the current Protocol not available yet, to be carried out in the last years of the Protocol

- **Distribution of economic value-added (in kEUR and in %) – annual average:**
NA

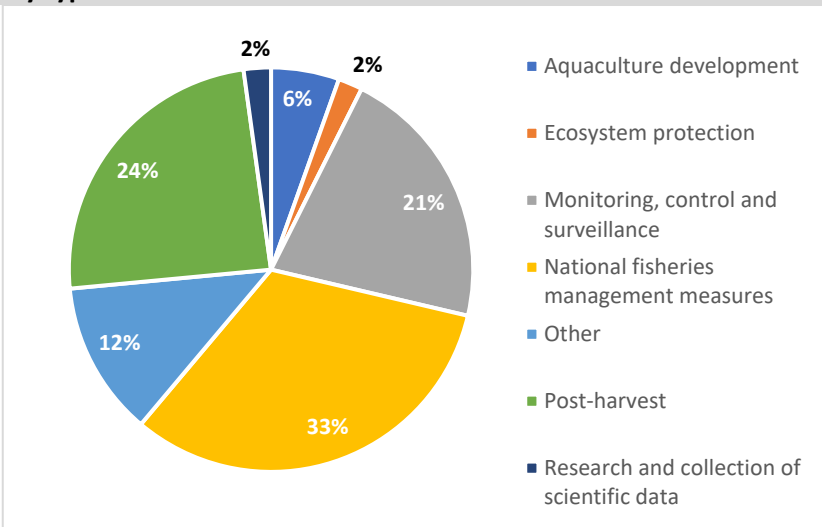
SFPA implemented since 2019 - absence of ex-post evaluation to the current Protocol to date

3-Sectoral support component

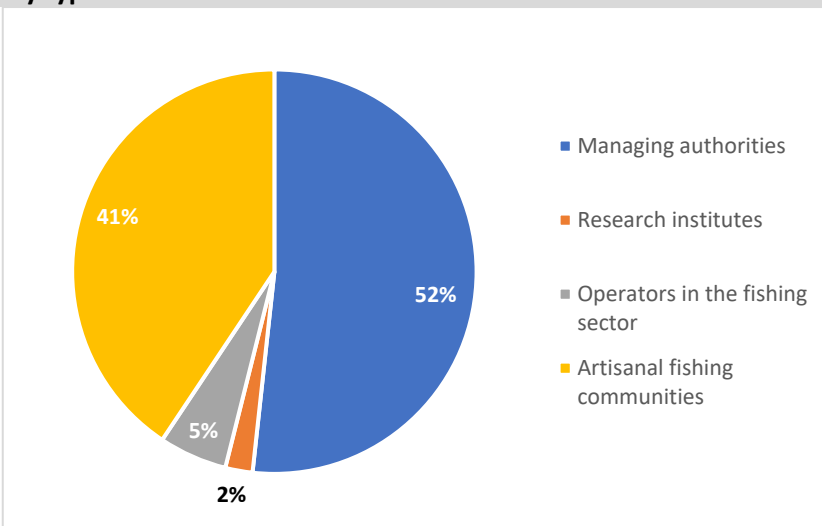
Total amount in EUR	
Previous Protocol	NA (expired in 1996)
Current Protocol (2019-2025)	1 650 000

- **Multiannual sectoral support programme**

By type of measures



By type of beneficiaries



- **Selected activities implemented by the sectoral support programme**

Activity

Monitoring, control, and surveillance

The sectoral support programme supported the creation of a national Fisheries Monitoring Centre (FMC) equipped with IT facilities to monitor the positions of fishing vessels on a permanent 24/7 basis through a satellite-based Vessel Monitoring System. The sectoral support programme also funded acquisition of satellite transponders to be installed on national vessels and training of national officers to installation and activation of those transponders.

National fisheries management measures

The sectoral support programme considers increasing the contribution of artisanal fishing communities to the management of national fisheries through engagement in co-management initiatives. Activities are expected to support the National sole co-management committee (NASCOM), the Women Oyster Association (TRY) and other organisations for the implementation of the co-management plans.

Ecosystem protection

The sectoral support programme considers a support to the TRY women oyster association with collaboration of partners to engage in the restoration and regeneration of mangroves as habitats and carbon sink and their monitoring during the closed season by harvesters as part of alternative livelihoods activities of the women.

GREENLAND

Background

Background information	
Population (2019)	56 225
GDP per capita (2018, current USD)	54 471 USD
Least developed Country (yes/no)	No
Income group	High income

Marine fisheries sector – context

- **National catches (evolution over 5 years, t per year): Atlantic Ocean and adjacent seas**

Group of species	2015	2016	2017	2018	2019
Highly migratory fishes*	2	42	94	144	69
Small pelagic fishes	81 997	59 494	88 544	81 341	34 694
Other (marine) fishes	109 377	124 771	124 879	124 808	126 956
Cephalopods	-	-	-	-	-
Crustaceans	76 329	88 126	96 680	94 040	102 801
Total	267 705	272 433	310 197	300 333	264 520

* Greenland shark

- **Access of foreign fleets to national waters:**

Group of fleets	Flag or group of States (ISO code), 2018 data
Tuna vessels	-
Non-tuna vessels	Western and Eastern Europe (EU, NOR, RUS, FRO)

- **Cooperation with the EU to fight IUU fishing according to the EU regulation:**

Notification to the EU by the country of its competent authorities (yes/no)	Yes
Identified as non-cooperating country within the last 5 years (yes/no)	No (see table below)

Pre-identified ('yellow card')	Pre-identification revoked	Identified ('red card')	Listed	Delisted
NA	NA	NA	NA	NA

- **Authorisation to export fishery products for human consumption to the EU (in compliance with the EU seafood safety regulations):**

On the current list of third countries authorised to export (yes/no)	Yes (wild catch* only)
Nr of <u>land-based</u> establishments authorised to export to the EU (year)	56 (2021**)

* inc. live, chilled, frozen, or processed bivalve molluscs, echinoderms, tunicates, and marine gastropods ** DVFA¹⁴⁶

- **Trade of fishery products exported to the EU28 (evolution over 5 years):**

Group of products - Quantity (t)	2015	2016	2017	2018	2019
Unprocessed fishery products	98 890	124 026	128 340	136 090	124 630
Processed fish products	668	517	656	118	143
Processed shellfish*	14 645	16 580	16 782	18 035	19 084
Total of fish products	114 202	141 123	145 778	154 243	143 857
Group of products – Value (kEUR)	2015	2016	2017	2018	2019
Unprocessed fishery products	275 913	371 192	368 362	370 633	478 180
Processed fish products	3 775	2 735	3 374	1 414	2 110
Processed shellfish*	99 887	96 354	102 361	113 184	158 466
Total of fish products	379 575	470 281	474 096	485 232	638 757

* Including other aquatic invertebrates

- **Accession / ratification of international binding agreements:**

UNCLOS 1982 - internationally in force since 1994	Yes (2004*)
UNFSA 1995 - since 2002	Yes (2003*)
FAO (high seas fishing vessel) compliance agreement- since 2003	No
PSMA - since 2016	Yes (2017*)
RFMO membership (year)	NAFO (1979*)
ILO Convention C188 - since Nov. 2017	No*
IMO STCW-F Convention - since 2012	No**
Cape Town Agreement - not in force	No***

* Adhesion by the Kingdom of Denmark, which specified that it does not apply to Greenland as autonomous territory within it (ILO, comm., 02. Sept. 2021);

** Accession by Denmark, pending completion of international procedures to apply to Greenland ;

*** Accession by Denmark but does not apply to Greenland (current situation)

- **Other key information (if any):** single SFPA in northern waters

Overview of the SFPA

1-General Data

Dates	
SFPA in force since	22/04/2021
Latest protocol applicable from – to (duration in years)	22/04/2021 – 21/04/2025 (4 years)

- **Groups of species authorised to catch by the Protocol:**

¹⁴⁶ Greenland works under the Danish Veterinary and Food Administration (DVFA) to comply with the EU's sanitary control requirements. See the list of approved Greenland's food plants for fishery products as well as factory vessels on DVFA's [web page](#) (Fiskevirksomheder under 'Approved food plants in Greenland').

Fishes			Molluscs	Shellfish
Highly migratory	Demersal	Small pelagic	Cephalopods	Crustaceans
	X	X		X

- Annual financial contribution foreseen by the Protocol (in EUR):**

For the 1 st year and onwards	Amount
EU public budget for access	13 590 754
EU shipowner's real contribution for access (estimate – contribution in 2018*)	2 162 000
Subtotal access payments (A)	15 752 754
EU public budget for sectoral support (B)	2 931 000
Total (A+B)	18693 754

* SFPA ex-post evaluation report, 2019

2-Access component

- Number of EU fishing possibilities by type and by year in the last four years:**

Annual fishing possibilities by tonnes by species (initial allocation - 2016)

Stock	Indicative level
Cod	1 800
Pelagic Redfish	2 200
Demersal Redfish	2 000
Greenland Halibut - West	2 500
Greenland Halibut - East	5 200
Northern Prawn - West	2 600
Northern Prawn - East	5 100
Capelin	20 000
Grenadier spp. - West	100
Grenadier spp. - East	100
Bycatch	1 126
Total	42 726

These indicative figures may be adjusted annually downwards or upwards, depending on the conservation state of the stock, the needs of the fishing industry and the surplus available.

Fishing vessel type	2017*	2018*	2019*	2020*
Tuna vessels	-	-	-	-
Small pelagic trawlers	NA	NA	NA	NA
Other types of vessels	NA	NA	NA	NA
Total				

Number of EU fishing authorisations taken by type and by year (same period)

Tuna vessels	NA	NA	NA	NA
Small pelagic trawlers	6	2	1	1
Other types of vessels	12	10	9	9
Total	18	12	10	10

* Previous Protocol

• **Total EU catch in the third country's waters (tonnes) in the last four years:**

	2017	2018	2019	2020
Highly migratory fishes	NA	NA	NA	NA
Small pelagic fishes*	2	12	2	5
Other (marine) fishes	11 228	11 280	11 437	11 169
Cephalopods	NA	NA	NA	NA
Crustaceans	2 698	3 131	3 793	4 845
Total	13 928	14 423	15 232	16 019

* For capelin, note a 100 % transfer of EU quota to Norway, hence no allocation to EU MS in the covered years explaining the low volume of small pelagic catch above

• **Estimated first sale value of EU total catch (annual average, million EUR):**

Period	2018-2020
Annual average	57.9

• **Interactions with the national fishing sector: previous Protocol**

Employment of national seamen onboard EU vessels	Yes, but marginal (voluntary)
Boarding of national scientific observers	No (voluntary), presence of EU observers
Landings / transshipping in national ports	Yes, but the majority of EU fishing vessels do not land in or visit Greenlandic ports (voluntary)
Sales of catch to national processing industry	Yes, but marginal (voluntary; a proportion of Northern prawns landed in Greenland are processed in Greenland)

• **Distribution of economic value-added (in kEUR and in %) – annual average 2016-2018:**

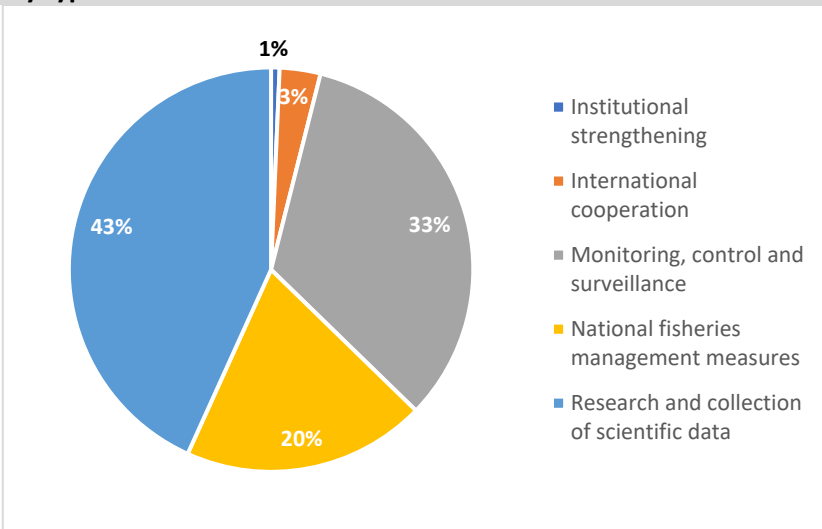
	EU	Partner country	Other entities	Total
Value	47 088	16 383	1 609	65 080
%	72 %	25 %	2 %	100 %

3-Sectoral support component

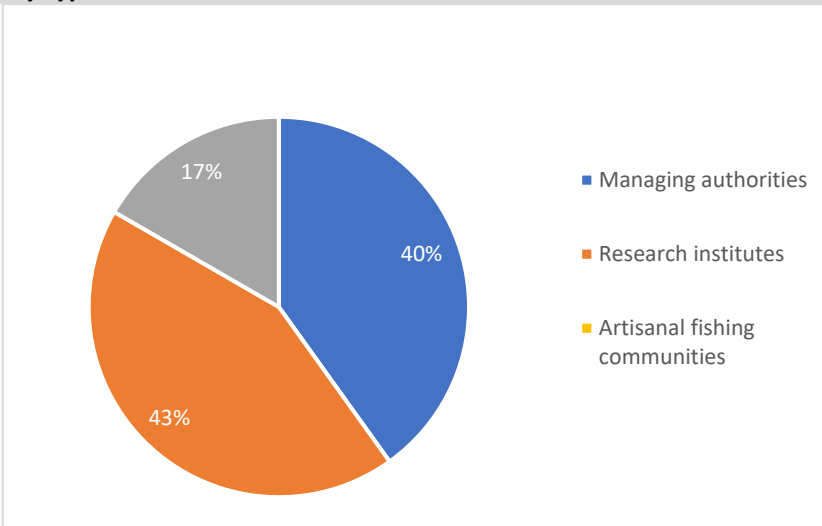
Total amount in EUR	
Previous Protocol (2016-2020)	14 655 000
Current Protocol (2021-2025)	11 724 000

- **Multiannual sectoral support programme (previous protocol)**

By type of measures



By type of beneficiaries



- **Selected activities implemented by the sectoral support programme (2016 – 2020)**

Activity

National fisheries management measures

The main area of support under the ‘administration’ policy priority was the financial support fund for the Inshore Fisheries Component. The extensive coastline of West Greenland (accounting for most of Greenland’s settlements) and highly dispersed nature of Greenland’s inshore fisheries, makes effective inshore fisheries management very costly. The inshore sector is transitioning to science-led management and adapting to the impacts of climate change on traditional fisheries.

Monitoring Control and Surveillance

A third of sector support was a contribution to the budget of GFLK, the Greenlandic control authority, primarily the ‘inspection and control of fisheries’ and includes the introduction of an e-logbook system and training of fishery officers.

Research and Collection of Scientific Data

The main support provided was in conducting research and surveys in the Greenlandic EEZ, which can be particularly challenging given the extensive sea area and the adverse weather/ice conditions. The Greenland EEZ is part of NAFO to the West and NEAFC to the East, requiring Greenland scientists to

Activity

participate and contribute in both RFMOs. The drafting and presenting of advice on stock status (and other scientific publications accounted for the remaining support under this aspect.

GUINEA-BISSAU

Background

Background information	
Population (2019)	1.9 million
GDP per capita (2019, current USD)	697 USD
Least developed Country (yes/no)	Yes
Income group	Low income

Marine fisheries sector – context

- **National catches (evolution over 5 years, t per year): Atlantic Ocean and adjacent seas**

Group of species	2015	2016	2017	2018	2019
Highly migratory fishes	35	35	35	35	35
Small pelagic fishes	45	45	45	45	45
Other (marine) fishes	6 409	6 409	6 409	6 409	6 420
Cephalopods	-	-	-	-	-
Crustaceans	61	61	61	61	61
Total	6 550	6 550	6 550	6 550	6 561

NB: all figures are FAO estimates

- **Access of foreign fleets to national waters:**

Group of fleets	Flag or group of States (ISO code), 2015 data except stated otherwise
Tuna vessels	EU (current - when the SFPA is active); non-EU vessels among others from Latin and Central America (e.g. BLZ, PAN)
Non-tuna vessels	EU (current - when the SFPA is active again), West Africa (GIN, MOR, MRT, SEN), Eastern Africa (COM), Asia (KOR, RUS; CHN – 2020 situation), Central America (KNA)

- **Cooperation with the EU to fight IUU fishing according to the EU regulation:**

Notification to the EU by the country of its competent authorities (yes/no)	No
Identified as non-cooperating country within the last 5 years (yes/no)	No (see table below)

Pre-identified ('yellow card')	Pre-identification revoked	Identified ('red card')	Listed	Delisted
NA	NA	NA	NA	NA

- **Authorisation to export fishery products for human consumption to the EU (in compliance with the EU seafood safety regulations):**

On the current list of third countries authorised to export (yes/no)	No ¹⁴⁷
Nr of <u>land-based</u> establishments authorised to export to the EU (year)	NA

- **Trade of fishery products exported to the EU28 (evolution over 5 years): NA**
- **Accession / ratification of international binding agreements:**

UNCLOS 1982 - internationally in force since 1994	Yes (1986)
UNFSA 1995 - since 2002	No (1995 – signatory only)
FAO (high seas fishing vessel) compliance agreement- since 2003	No
PSMA - since 2016	No
RFMO membership (year)	ICCAT (2016)
ILO Convention C188 - since Nov. 2017	No
IMO STCW-F Convention - since 2012	No
Cape Town Agreement - not in force	No

- **Other key information (if any): -**

Overview of the SFPA

1-General Data

Dates	
SFPA in force since	16/06/2007
Latest protocol applicable from – to (duration in years)	15/06/2019 – 14/06/2024 (5 years)

- **Groups of species authorised to catch by the Protocol:**

Highly migratory	Fishes			Molluscs	Shellfish
	Demersal	Small pelagic		Cephalopods	Crustaceans
X	X	X		X	X

¹⁴⁷ Not in the list since 2006 (see 2006/766/EC: Commission Decision of 6 November 2006, its consolidated versions, and further regulation having repealed it Commission Implementing Regulation (EU) 2019/626 of 5 March 2019 then Commission Implementing Regulation (EU) 2021/405 of 24 March 2021 and its current consolidated version)

- **Annual financial contribution foreseen by the Protocol (in EUR):**

	Amount
EU public budget for access	11 600 000
EU shipowner's contribution for access (estimate*)	4 000 000
Subtotal access payments (A)	15 600 000
EU public budget for sectoral support (B)	4 000 000
Total (A+B)	19 600 000

* Figure in the Protocol

2-Access component

From 24/11/2017 to 14/06/2019, SFPA dormant and application of its exclusivity clause

- **Number of EU fishing possibilities by type and by year in the last four years:**

Fishing vessel type	2017*	2018	2019	2020
Tuna vessels	40	NA	41	41
Small pelagic trawlers	NA**	NA	In GRT	In GRT
Other types of vessels	In GRT	NA	In GRT	In GRT
Total	NA	NA	NA	NA

Number of EU fishing authorisations taken by type and by year (same period)

Tuna vessels	29	NA	30	30
Small pelagic trawlers	NA**	NA	4	0
Other types of vessels	26	NA	19	25
Total	55	NA	53	55

* Previous Protocol, ** absence of a small pelagic category in the previous Protocol

- **Total EU catch in the third country's waters (tonnes) in the last four years:**

	2017*	2018	2019	2020
Highly migratory fishes	2 093	NA	96	467
Small pelagic fishes	9 421	NA	1 073	4 740
Other (marine) fishes	7 727	NA	4 850	4 216
Cephalopods	1 262	NA	1 310	329
Crustaceans	1 470	NA	726	913
Total	21 974	0	8 055	10 665

* Previous Protocol

- **Estimated first sale value of EU total catch (annual average, million EUR):**

Period	2019-2020
Annual average	29.8

• **Interactions with the national fishing sector:**

Employment of national seamen onboard EU vessels	Yes (Compulsory) Protocol requirements: min. five to eight qualified Guinea-Bissau seamen depending on the gross registered tonnage of the EU vessel
Boarding of national scientific observers	No (situation in oct. 2019: a training programme was about to developed) Voluntary for EU tuna vessels (protocol requirement: observer on board required through a system of regional observers and the choice of the the competent fisheries organisation) Compulsory for non-EU tuna vessels (protocol requirement)
Landings / transshipping in national ports	Compulsory landing for EU trawlers (protocol requirement: contribution in kind for food security by landing part of their catches)
Sales of catch to national processing industry	Voluntary See the contribution in kind above

• **Distribution of economic value-added (in kEUR and in %) – year 2015:**

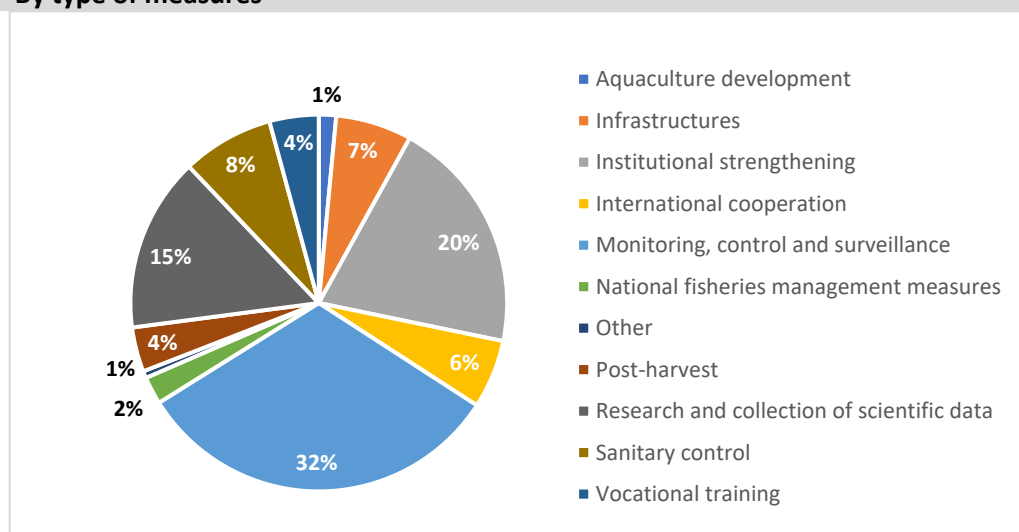
	EU	Partner country	Other entities	Total
Value	5 225	2 504	4 781	12 510
%	42 %	20 %	38 %	100 %

3-Sectoral support component

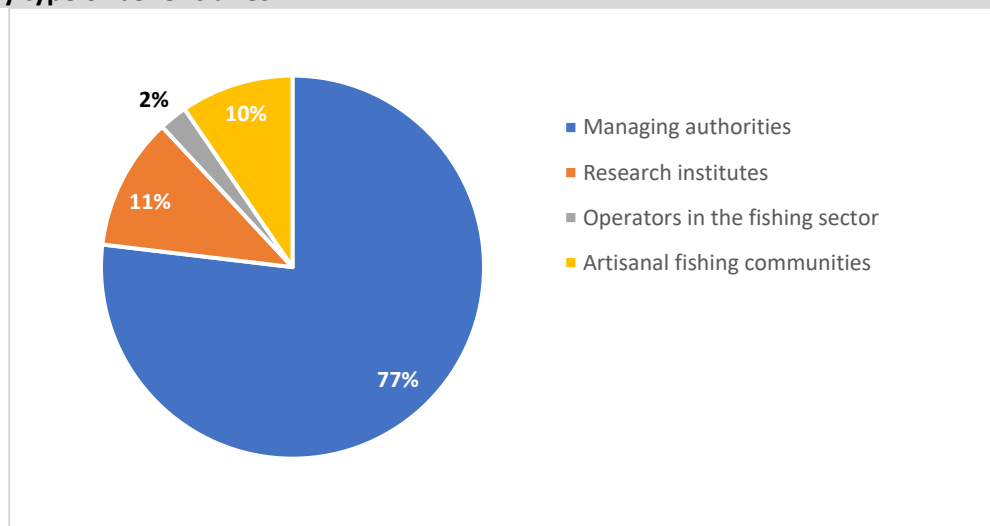
Total amount in EUR	
Previous Protocol (2014-2017)	9 000 000
Current Protocol (2019-2024)	20 000 000

• **Multiannual sectoral support programme (previous Protocol)**

By type of measures



By type of beneficiaries



- **Selected activities implemented by the sectoral support programme (Previous Protocol)**

Activity

Monitoring, control and surveillance

The sectoral support programme included the acquisition of new patrol vessels, funding of patrols, the equipment and the functioning of the + Siège Fisheries Monitoring Centre, and the construction of a new surveillance centre in the south of the Country in Cacine. The programme also supported participation of fishing communities in surveillance of activities in the inshore zones.

Research and collection of scientific data

Activities implemented under the sectoral support programme contributed to the construction of the new headquarters of the *Centro de Investigação Pesqueira Aplicada* (CIPA), funding of scientific research campaigns at sea with chartered research vessels (Mauritania and Spain), training of scientific observers and other research activities for provision of the relevant scientific information for the elaboration of the annual fisheries management plans enacted by the managing authorities.

Post harvest

The sectoral support programme contributed to the construction of artisanal processing workshops for women of the Bubacalão fishing community (e.g. drying, salting), and to the acquisition of ice-making machine and other equipment to complete the renovation of the Bubaque, Alto Bandim and Uracane artisanal landing sites.

Sanitary control

The sectoral support programme accompanies the efforts of Guinea Bissau to obtain the authorisation to export fisheries products to the EU in the medium term. Activities included the construction of the *Laboratório Nacional das Pescas* of the designated competent authority (CIPA), and purchase of reagents and equipment for the analysis.

KIRIBATI

Background

Background information	
Population (2019)	117 608
GDP per capita (2019, current USD)	1 655 USD
Least developed Country (yes/no)	Yes
Income group	Lower middle income

Marine fisheries sector – context

- **National catches (evolution over 5 years, t per year): Pacific Ocean**

Group of species	2015	2016	2017	2018	2019
Highly migratory fishes	143 136	13 096	19 463	23 750	28 345
Small pelagic fishes	18	20	18	18	18
Other (marine) fishes	2 839	161 233	143 162	174 338	196 629
Cephalopods	1	1	1	1	1
Crustaceans	20	25	20	20	20
Total	143 136	13 096	19 463	23 750	28 345

- **Access of foreign fleets to national waters** : in 2012, when the SFPA was active

Group of fleets	Flag or group of States (ISO code), 2012 data
Tuna vessels	Asia-Pacific (China, Ecuador, El Salvador, Fiji, Korea, Japan, Papua New Guinea, Marshall Islands, Micronesia, New Zealand, Taiwan, USA, Tuvalu, Vanuatu), EU (Spain)
Non-tuna vessels	Absence of foreign industrial fleet

- **Cooperation with the EU to fight IUU fishing according to the EU regulation** :

Notification to the EU by the country of its competent authorities (yes/no)	Yes
Identified as non-cooperating country within the last 5 years (yes/no)	No (see table below)

Pre-identified ('yellow card')	Pre-identification revoked	Identified ('red card')	Listed	Delisted
April 2016	Dec. 2020	NA	NA	NA

- **Authorisation to export fishery products for human consumption to the EU (in compliance with the EU seafood safety regulations)** :

On the current list of third countries authorised to export (yes/no)	Yes (wild catch only)
Nr of <u>land-based</u> establishments authorised to export to the EU (year)	1 (2017 and onwards)

- **Trade of fishery products exported to the EU28 (evolution over 5 years) :**

Group of products - Quantity (t)	2015	2016	2017	2018	2019
Unprocessed fishery products	0	0	0	16	0
Processed fish products	-	-	-	-	-
Total of fish products	0	0	0	16	-
Group of products – Value (kEUR)	2015	2016	2017	2018	2019
Unprocessed fishery products	0	0	0	171	0
Processed fish products	-	-	-	-	-
Total of fish products	0	0	0	171	0

- **Accession / ratification of international binding agreements :**

UNCLOS 1982 - internationally in force since 1994	Yes (2003 - adhesion)
UNFSA 1995 - since 2002	Yes (2005 – adhesion)
FAO (high seas fishing vessel) compliance agreement- since 2003	No
PSMA - since 2016	No
RFMO membership (year)	Yes (2003 – accession)
ILO Convention C188 - since Nov. 2017	No
IMO STCW-F Convention - since 2012	Yes (2007 – accession)
Cape Town Agreement - not in force	No

- **Other key information (if any):** latest Protocol to the SFPA between the EU and Kiribati expired in 2015, 4 EU purse seiners were active in 2014 and 2015, EU catch of highly migratory fishes in 2015 was 12 993 t

Overview of the SFPA

1-General Data

Dates	
SFPA in force since	16/09/2012
Latest protocol applicable from – to (duration in years)	16/09/2012 - 15/09/2015 (3 years)

- **Groups of species authorised to catch by the Protocol :**

Fishes			Molluscs	Shellfish
Highly migratory	Demersal	Small pelagic	Cephalopods	Crustaceans
X				

- **Annual financial contribution foreseen by the Protocol (in EUR):**

	Amount
EU public budget for access	975 000
EU shipowner's contribution for access (estimate*)	1 725 000
Subtotal access payments (A)	2 700 000
EU public budget for sectoral support (B)	350 000
Total (A+B)	3 050 000

* Based on a reference tonnage of 15 000 t of highly migratory species caught at 35 EUR / t and a special contribution for fishing authorisation to be paid by shipowners to the Kiribati Government in the amount of EUR 300 000 per tuna seiner vessel with a maximum of 4 purse seiners authorised each year (Protocol terms); note : not considered above, other costs such as additional observer flat-rate fee of EUR 2 300 per vessel per year

2-Access component

- **Number of EU fishing possibilities by type and by year in the last four years:**
NA
- **Total EU catch in the third country's waters (tonnes) in the last four years:**
NA
NA – not applicable: latest Protocol expired in 2015 (more than four years ago)
- **Estimated first sale value of EU total catch (annual average, million EUR):**

Period	2015
Annual average	13.1

- **Interactions with the national fishing sector:** during the latest Protocol that expired in 2015

Employment of national seamen onboard EU vessels	Yes (compulsory: at least three Kiribati seamen as a crew-member; otherwise a waiver fee)
Boarding of national scientific observers	Yes (voluntary; 100 % observer coverage of the EU purse seiners through the regional observer programme of purse seiners)
Landings / transshipping in national ports	Yes (voluntary)
Sales of catch to national processing industry	Yes (voluntary)

- **Distribution of economic value-added (in kEUR and in %) – 2013:**

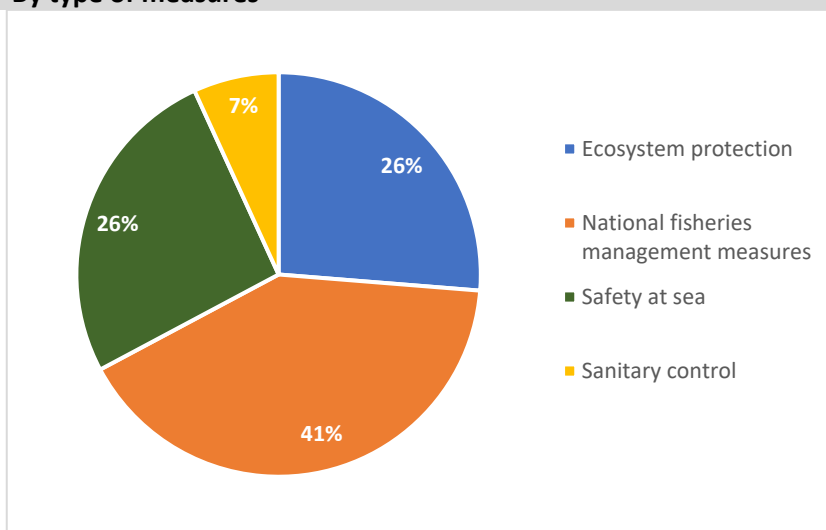
	EU	Partner country	Other entities	Total
Value	-	-	-	8 037 000
%	-	-	-	100 %

3-Sectoral support component

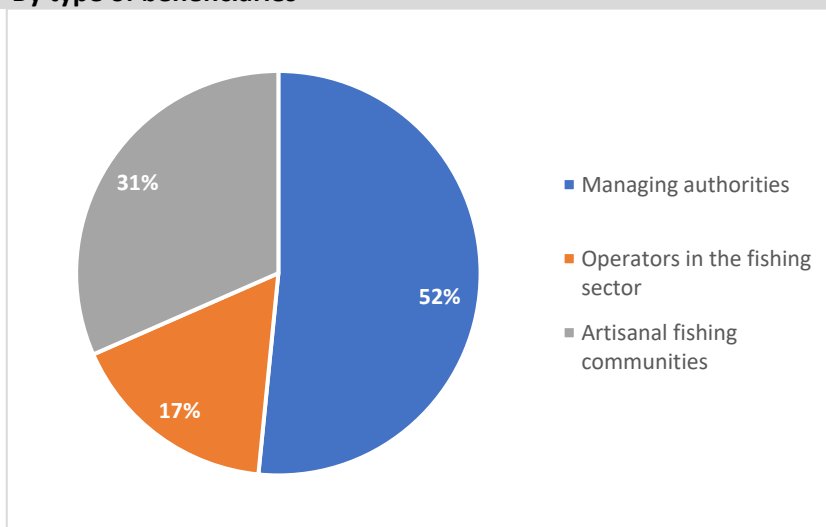
Total amount in EUR	
Previous Protocol (2012-2015)	1 050 000
Current Protocol	NA

- **Multiannual sectoral support programme**

By type of measures



By type of beneficiaries



- **Selected activities implemented by the sectoral support programme**

Activity

National fisheries management measures

A network of nearshore anchored FADs was deployed around Betio and South Tarawa as part of Government support program to local fishers on Tarawa. These FADs attract both tuna and deep bottom fish and fishing pressure to coastal areas is reduced. The fish caught at these FADs in addition of its importance to the food security of the local population provides income. The deployment of FADs was complemented by a national management plan setting out key roles and responsibilities of various relevant agencies involved in the FAD programme.

Activity

Also, lagoon and coastal fisheries are pivotal to sustain and support the local communities in Kiribati. However, there is continuing impact of overfishing of coastal fisheries which have imposed a great challenge to long-term sustainability of the resources to address food security. In addressing these concerns, a number of regulations have been developed to address the management and conservation of fisheries, such as the sea cucumber fishery regulation and the Shark Sanctuary Regulation already endorsed and enforced at the national level.

Safety at sea

Workshops and training for improved safety at sea for artisanal vessels on islands. Every year a number of Kiribati artisanal fishermen go missing at sea for various circumstances (engine failures, rough weather, etc). In addition to the loss of human lives, search and rescue missions organised to locate the fishing vessels are very costly. Various trainings and workshops on 'Basic sea safety'; 'Outboard motor engine maintenance and troubleshooting'; and 'Onboard fish handling and storage' were developed and conducted.

Sanitary control

Support to the development of a competent authorities and to drafting of an adequate regulatory framework in cooperation with other donors successfully supported the inclusion of Kiribati on the DG SANTE list of third countries authorised to export fisheries products to the EU. This resulted in higher prices paid to tuna vessels flagged to Kiribati, and also demonstrated to other Pacific countries that it is possible for Small Islands Developing States to comply with the EU sanitary standards.

LIBERIA

Background

Background information	
Population (2019)	4.9 million
GDP per capita (2019, current USD)	622 USD
Least developed Country (yes/no)	Yes
Income group	Low income

Marine fisheries sector – context

- **National catches (evolution over 5 years, t per year): Atlantic Ocean and adjacent seas**

Group of species	2015	2016	2017	2018	2019
Highly migratory fishes	769	800	1919	714	1598
Small pelagic fishes	630	45	45	45	45
Other (marine) fishes	11 041	11 588	9 015	12 652	13 867
Cephalopods	15	15	103	69	210
Crustaceans	260	260	132	6	58
Total	12 715	12 708	11 214	13 486	15 778

NB: FAO estimates for 2015 and 2016

- **Access of foreign fleets to national waters:**

Group of fleets	Flag or group of States (ISO code), 2020 data except stated otherwise
Tuna vessels	Central- Latin America (BLZ, CUW, GTM, PAN, SLV), West Africa (CPV, GHA, SEN) EU absence currently*
Non-tuna vessels	Asia (CHN)

* SFPA dormant since 9.12.2020, its exclusivity clause applies

- **Cooperation with the EU to fight IUU fishing according to the EU regulation:**

Notification to the EU by the country of its competent authorities (yes/no)	No
Identified as non-cooperating country within the last 5 years (yes/no)	No (see table below)

Pre-identified ('yellow card')	Pre-identification revoked	Identified ('red card')	Listed	Delisted
Yes	-	-	-	-

- **Authorisation to export fishery products for human consumption to the EU (in compliance with the EU seafood safety regulations):**

On the current list of third countries authorised to export (yes/no)	No ¹⁴⁸
Nr of <u>land-based</u> establishments authorised to export to the EU (year)	NA

- **Trade of fishery products exported to the EU28 (evolution over 5 years): NA**
- **Accession / ratification of international binding agreements:**

UNCLOS 1982 - internationally in force since 1994	Yes (2008)
UNFSA 1995 - since 2002	Yes (2005 – accession)
FAO (high seas fishing vessel) compliance agreement- since 2003	No
PSMA - since 2016	Yes (2019 – accession)
RFMO membership (year)	ICCAT (2014)
ILO Convention C188 - since Nov. 2017	No
IMO STCW-F Convention - since 2012	No
Cape Town Agreement - not in force	No

- **Other key information (if any):**

Overview of the SFPA

1-General Data

Dormant SFPA

Dates	
SFPA in force since	09/12/2015
Latest protocol applicable from – to (duration in years)	09/12/2015 – 08/12/2020 (5 years)

- **Groups of species authorised to catch by the latest Protocol:**

	Fishes		Molluscs	Shellfish
Highly migratory	Demersal	Small pelagic	Cephalopods	Crustaceans
X				

¹⁴⁸ Not authorised since at least 2006 (trade analysis on COMEXT and confirmed on EUR-LEX)

- **Annual financial contribution foreseen by the latest Protocol (in EUR):**

For the 5 th year (2020)	Amount
EU public budget for access*	292 500
EU shipowner's contribution for access (estimate*)	455 000
Subtotal access payments (A)	747 500
EU public budget for sectoral support (B)	292 500
Total (A+B)	1 040 000

* Based on a reference tonnage of 6 500 t of highly migratory species caught

** Based on the reference tonnage above and EUR 70 per tonne of fish caught; not considered above, other costs such as additional observer flat-rate fee of EUR 400 per vessel per year ; fee per support vessel: EUR 3 000 per vessel / year

2-Access component

- **Number of EU fishing possibilities by type and by year in the last four years:**

Fishing vessel type	2017*	2018*	2019*	2020*
Tuna vessels	34	34	34	34
Small pelagic trawlers	NA	NA	NA	NA
Other types of vessels	NA	NA	NA	NA
Total	34	34	34	34

Number of EU fishing authorisations taken by type and by year (same period)

Tuna vessels	23	22	22	22
Small pelagic trawlers	NA	NA	NA	NA
Other types of vessels	NA	NA	NA	NA
Total	23	22	22	22

* Previous Protocol

- **Total EU catch in the third country's waters (tonnes) in the last four years:**

	2017	2018	2019	2020
Highly migratory fishes	7 885	4 607	4 332	2 451
Small pelagic fishes	NA	NA	NA	NA
Other (marine) fishes	NA	NA	NA	NA
Cephalopods	NA	NA	NA	NA
Crustaceans	NA	NA	NA	NA
Total	7 885	4 607	4 332	2 451

- **Estimated first sale value of EU total catch (annual average, million EUR):**

Period	2018-2020
Annual average	5.6

- **Interactions with the national fishing sector: latest Protocol** (situation: early 2020)

Employment of national seamen onboard EU vessels	No (voluntary) Protocol requirement: at least 20% of seamen of ACP origin during the tuna fishing season in the fishing zone of third countries. EU vessels owners should endeavour to sign on three qualified Liberian seamen per vessel selected from a list submitted by Liberia to the EU
Boarding of national scientific observers	No (100 % coverage on EU purse seiners through different programmes, longliners covered in compliance with different programmes) Protocol requirement: qualified observers designated by Liberia on 15 % of EU vessels authorised to fish in Liberia
Landings / transshipping in national ports	No (voluntary)
Sales of catch to national processing industry	No (voluntary)

- **Distribution of economic value-added (in kEUR and in %) – annual average 2016-2018:**

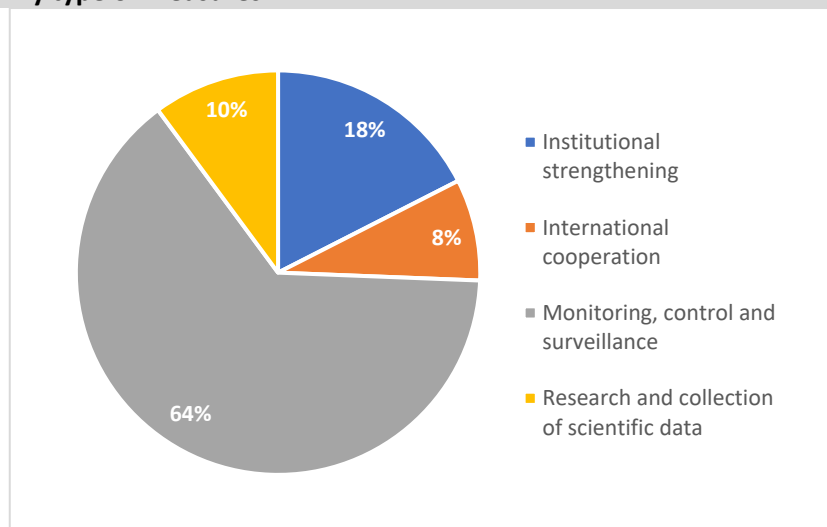
	EU	Partner country	Other entities	Total
Value	3 233	716	2 519	6 468
%	50 %	11 %	39 %	100%

3-Sectoral support component

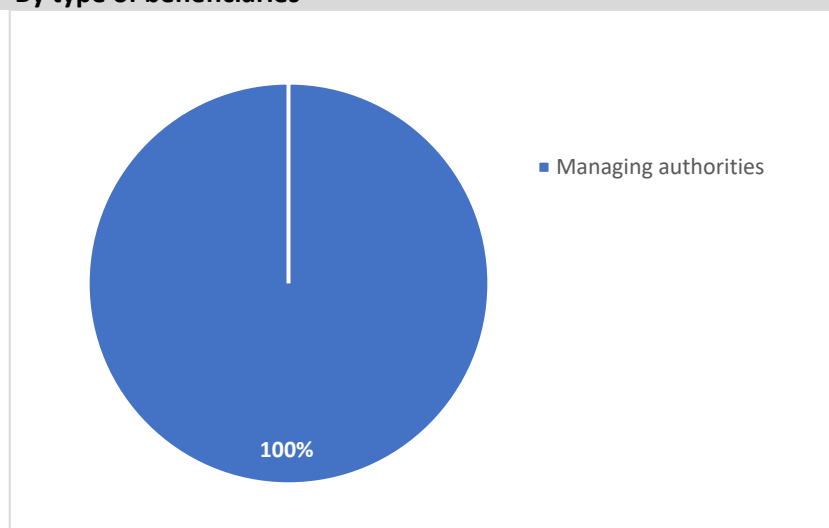
Total amount in EUR	
Previous Protocol (2015-2020)	1 625 000
Current Protocol	NA

- **Multiannual sectoral support programme**

By type of measures



By type of beneficiaries



- **Selected activities implemented by the sectoral support programme**

Activity

Monitoring, control, and surveillance

The sectoral support programme supported the development of a Fisheries Monitoring Centre (FMC) with full and permanent internet access, VMS access and AIS data, and a radio system capable of performing all necessary MCS actions. The sectoral support programme also included funding of patrols generally executed in association with the Coast Guard.

Research and collection of scientific data

A comprehensive system data collection programme was supported. This led to the publication of an Annual Report of the Fisheries Research and Statistics Division (online) which is responsible for collection and analysis of fisheries data. Regular catch and effort data are electronically recorded using a mobile (tablet) system. Fish price information is also recorded. Information on small-scale fisheries is available by county/ fishing community, by type of canoe and by species/ species group. A study was undertaken on the impact of the proposed reduction of the Inshore Exclusion Zone from 6 to 4 nm with recommendations on relevant management measures. A short socio-economic study on poverty and credit in an artisanal fishing community has also been concluded.

Institutional strengthening

The sectoral support funded equipment of the different offices of the managing authority (photocopiers, laptops, printers, vehicles, generators). In addition, sectoral support activities included funding of training overseas (MScs, PhD). In collaboration with the Agriculture College at the University of Liberia a curriculum for a BSc in fisheries science has been prepared, by drawing on the experiences of the postgraduates and the curriculum of the University of Iceland which several former students attended.

MADAGASCAR

Background

Background information	
Population (2019)	27.0 million
GDP per capita (2019, current USD)	523 USD
Least developed Country (yes/no)	Yes
Income group	Low income

Marine fisheries sector – context

- **National catches (evolution over 5 years, t per year): Pacific Ocean**

Group of species	2015	2016	2017	2018	2019
Highly migratory fishes	8 717	8 693	8 563	8 507	8 545
Small pelagic fishes	-	-	-	-	-
Other (marine) fishes	58 727	76 555	79 552	59 654	43 420
Cephalopods	1 483	2 013	3 784	8 098	9 905
Crustaceans	15 687	17 803	26 771	26 252	23 935
Total	83 131	103 051	114 886	94 413	75 900

- **Access of foreign fleets to national waters:**

Group of fleets	Flag or group of States (ISO code), 2018 data
Tuna vessels	Central and Latin America (different flag States, Eastern Africa (SYC), Asia (KOR, JPN, TWN) EU absence currently*
Non-tuna vessels	Asia (CHN)

* SFPA dormant since 01.01.20219, its exclusivity clause applies

- **Cooperation with the EU to fight IUU fishing according to the EU regulation:**

Notification to the EU by the country of its competent authorities (yes/no)	Yes
Identified as non-cooperating country within the last 5 years (yes/no)	No (see table below)

Pre-identified ('yellow card')	Pre-identification revoked	Identified ('red card')	Listed	Delisted
NA	NA	NA	NA	NA

- **Authorisation to export fishery products for human consumption to the EU (in compliance with the EU seafood safety regulations):**

On the current list of third countries authorised to export (yes/no)	Yes
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Nr of <u>land-based</u> establishments authorised to export to the EU (year)	36 (2019 and onwards)
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- **Trade of fishery products exported to the EU28 (evolution over 5 years):**

Group of products - Quantity (t)	2015	2016	2017	2018	2019
Unprocessed fishery products	7 360	10 082	11 729	10 294	9 207
Processed fish products	10 344	7 129	8 159	6 300	6 713
Processed shellfish*	24	14	26	34	23
Total of fish products	17 727	17 225	19 915	16 628	15 942
Group of products – Value (kEUR)	2015	2016	2017	2018	2019
Unprocessed fishery products	63 401	87 165	107 142	98 550	81 507
Processed fish products	36 297	26 300	32 995	27 364	26 561
Processed shellfish*	196	76	238	301	223
Total of fish products	99 894	113 540	140 376	126 214	108 292

* Including other aquatic invertebrates

- **Accession / ratification of international binding agreements:**

UNCLOS 1982 - internationally in force since 1994	Yes (2001)
UNFSA 1995 - since 2002	No
FAO (high seas fishing vessel) compliance agreement- since 2003	Yes (1994 – acceptance)
PSMA - since 2016	Yes (2017 – accession)
RFMO membership (year)	IOTC (1996)
ILO Convention C188 - since Nov. 2017	No
IMO STCW-F Convention - since 2012	No
Cape Town Agreement - not in force	No

- **Other key information (if any):** in the north of Madagascar (Antsiranana), a port used for small maintenance by some of the EU and non-EU vessels and a tuna cannery, a fishing zone for EU longliners based in La Réunion (EU outermost region)

Overview of the SFPA

1-General Data

Dormant SFPA

Dates	
SFPA in force since	01/01/2007
Latest protocol applicable from – to (duration in years)	01/01/2015 - 31/12/2018 (4 years)

- **Groups of species authorised to catch by the latest Protocol:**

Fishes			Molluscs	Shellfish
Highly migratory	Demersal	Small pelagic	Cephalopods	Crustaceans
X				

- **Annual financial contribution foreseen by the latest Protocol (in EUR):**

For the third year and onwards	Amount
EU public budget for access	787 500
EU shipowner's contribution for access (estimate*)	1 102 500
Subtotal access payments (A)	1 890 000
EU public budget for sectoral support (B)	700 000
Total (A+B)	2 590 000

* In the Protocol, based on a reference tonnage of 15 750 t of highly migratory species caught

** Based on the reference tonnage above and EUR 70/t of fish caught by ship-owners; not considered above, other costs such as fee per support vessel: EUR 3 500 per vessel / year

2-Access component

- **Number of EU fishing possibilities by type and by year in the last four years:**

Fishing vessel type	2017*	2018*	2019	2020
Tuna vessels	94	94	NA	NA
Small pelagic trawlers	NA	NA	NA	NA
Other types of vessels	NA	NA	NA	NA
Total	96	96	NA	NA

Number of EU fishing authorisations taken by type and by year (same period)

Tuna vessels	51	52	NA	NA
Small pelagic trawlers	NA	NA	NA	NA
Other types of vessels	NA	NA	NA	NA
Total	51	52	NA	NA

* Previous Protocol

- **Total EU catch in the third country's waters (tonnes) in the last four years:**

	2017	2018	2019	2020
Highly migratory fishes	10 754	5 843	NA	NA
Small pelagic fishes	NA	NA	NA	NA
Other (marine) fishes	NA	NA	NA	NA
Cephalopods	NA	NA	NA	NA
Crustaceans	NA	NA	NA	NA
Total	10 754	5 843	NA	NA

- **Estimated first sale value of EU total catch (annual average, million EUR):**

Period	2015-2018
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Annual average	14.3
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• **Interactions with the national fishing sector:**

Employment of national seamen onboard EU vessels	Yes (voluntary)
Boarding of national scientific observers	Yes (compulsory for a portion of the fleet; EU PS fleet 100 % covered through the IOC regional observer programme and deployment on longliners of 100 GT and more through the national observer scheme) Protocol requirement: at the request of the Malagasy authorities, the EU fishing vessels authorised to fish in the Malagasy fishing zone shall take on board observers representing 10 % of the total number of vessels authorised to fish
Landings / transshipping in national ports	Yes (voluntary)
Sales of catch to national processing industry	Yes (voluntary)

• **Distribution of economic value-added (in kEUR and in %) – annual average 2015-2017:**

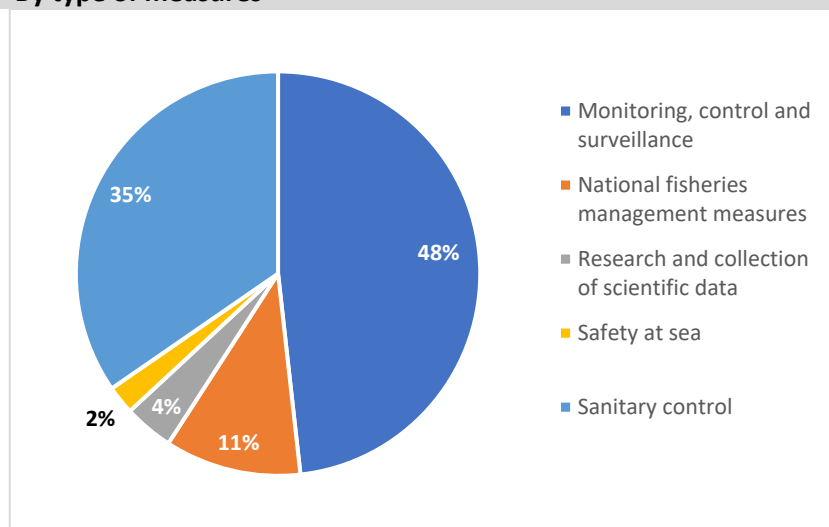
	EU	Partner country	Other entities	Total
Value	4 682	4 335	876	9 893
%	47 %	44 %	9 %	100 %

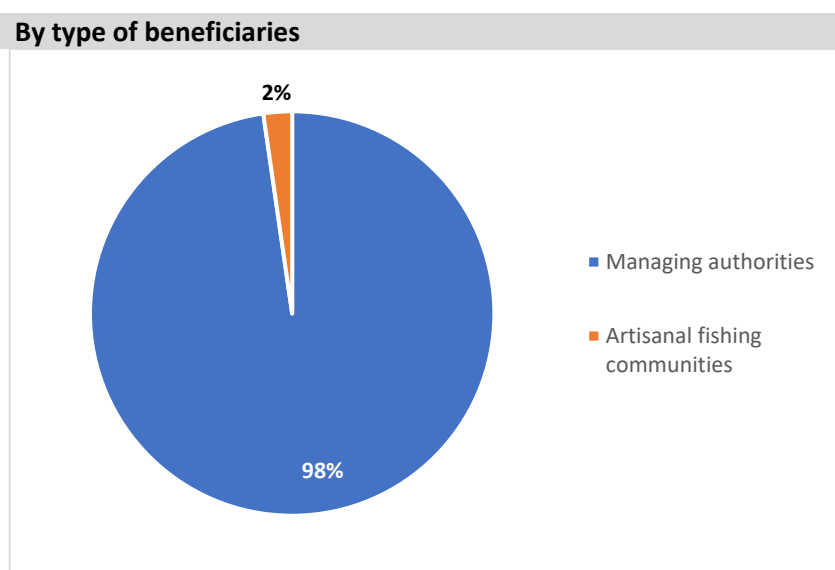
3-Sectoral support component

Total amount in EUR	
Previous Protocol (2015-2018)	2 800 000
Current Protocol	NA

• **Multiannual sectoral support programme**

By type of measures





- **Selected activities implemented by the sectoral support programme**

Activity

Monitoring, control, and surveillance

The sectoral support enabled to contribute to fisheries enforcement by contributing to the costs of fishing surveillance at sea, under the responsibility of the Fisheries surveillance centre (CSP) including on board inspection and airborne surveillance. It also contributed to the participation of CSP staff to the regional fisheries surveillance programme the fisheries monitoring centre co-funded by the EU.

Sanitary Control

The Programme contributed to the public seafood safety controls of shrimps intended to the national and EU markets by funding lab tests. It also contributed to payments of national laboratories in charge of lab tests on behalf of the Malagasy seafood safety competent authority (ASH), which was also part of the expected results of the Programme.

National fisheries management measures

The Programme funded the registration of small-scale fishers (30 000 fishers registered) and the marking of small-scale fishing boats (10 000 boats marked in 2016) and to an awareness and training programme to small-scale fishers with regards to the new Fisheries Act (500 fishermen were trained).

MAURITANIA

Background

Background information	
Population (2019)	4.5 million
GDP per capita (2019, current USD)	1 679 USD
Least developed Country (yes/no)	Yes
Income group	Lower middle income

Marine fisheries sector – context

- **National catches (evolution over 5 years, t per year): Atlantic Ocean and adjacent seas**

Group of species	2015	2016	2017	2018	2019
Highly migratory fishes	3 341	3 250	14 911	9 825	15 511
Small pelagic fishes	277 297	456 768	535 079	729 974	527 030
Other (marine) fishes	60 467	94 264	176 746	171 173	105 023
Cephalopods	43 268	36 573	45 844	34 651	49 226
Crustaceans	2 889	1 484	1 235	136	1 761
Total	387 262	592 339	773 815	945 759	698 551

NB: FAO estimates for 2019

- **Access of foreign fleets to national waters:**

Group of fleets	Flag or group of States (ISO code), 2018 data*
Tuna vessels	EU, Asia (JPN), Central and Latin America (SLV, BLZ, CUW, GTM, PAN), West Africa (CIV, CPV, SEN)
Non-tuna vessels	Eurasia (EU, GEO, RUS, TUR), Africa (SEN – including an artisanal fleet, CMR, NMB), , Central America (such as BLZ, VCT), Asia (CHN, IDN)

* SFPA evaluation report, 2019; and 1st FiTI [report](#) from Mauritania, 2021 – see pp. 86-87 (access: 08.06.21)

- **Cooperation with the EU to fight IUU fishing according to the EU regulation:**

Notification to the EU by the country of its competent authorities (yes/no)	Yes
Identified as non-cooperating country within the last 5 years (yes/no)	No (see table below)

Pre-identified ('yellow card')	Pre-identification revoked	Identified ('red card')	Listed	Delisted
NA	NA	NA	NA	NA

- **Authorisation to export fishery products for human consumption to the EU (in compliance with the EU seafood safety regulations):**

On the current list of third countries authorised to export (yes/no)	Yes (only wild catch)
Nr of <u>land-based</u> establishments authorised to export to the EU (year)	105 (2021)

- **Trade of fishery products exported to the EU28 (evolution over 5 years):**

Group of products - Quantity (t)	2015	2016	2017	2018	2019
Unprocessed fishery products	38 613	36 965	42 048	38 768	47 661
Processed fish products	61	0	2	0	-
Total of fish products	38 674	36 966	42 050	38 768	47 661
Group of products – Value (kEUR)	2015	2016	2017	2018	2019
Unprocessed fishery products	213 740	219 406	314 862	356 860	334 539
Processed fish products	685	1	15	1	-
Total of fish products	214 425	219 407	314 877	356 861	334 539

- **Accession / ratification of international binding agreements:**

UNCLOS 1982 - internationally in force since 1994	Yes (1996)
UNFSA 1995 - since 2002	No (1995 – signatory only)
FAO (high seas fishing vessel) compliance agreement- since 2003	No
PSMA - since 2016	Yes (2017 – accession)
RFMO membership (year)	ICCAT (2008)
ILO Convention C188 - since Nov. 2017	No
IMO STCW-F Convention - since 2012	Yes
Cape Town Agreement - not in force	No

- **Other key information (if any):** historical fishing zone for small pelagic fishing for EU vessels, historical fishing zone for EU vessels based in Canary Islands (EU outermost region), relevant fishing zone in West Africa for EU and non-UE tropical tuna purse seiners in the regional network of fishing zones in the last five - six years

Overview of the SFPA

1-General Data

Dates	
SFPA in force since	30/11/2006
Latest protocol applicable from – to (duration in years)	16/11/2015 - 15/11/2021 (6 years*)

* 4 years initially and extended by one year twice

- **Groups of species authorised to catch by the Protocol:**

Fishes	Molluscs	Shellfish
--------	----------	-----------

Highly migratory	Demersal	Small pelagic	Cephalopods	Crustaceans
X	X	X		X

- Annual financial contribution foreseen by the Protocol (in EUR):**

From 2017 onwards	Amount
EU public budget for access	57 500 000
EU shipowner's contribution for access (estimate*)	17 071 000
Subtotal access payments (A)	74 571 000
EU public budget for sectoral support (B)	4 125 000
Total (A+B)	78 696 000

* Source: ex-post evaluation report annual average amount in the period 2015 – 2018

2-Access component

- Number of EU fishing possibilities by type and by year in the last four years:**

Fishing vessel type	2017	2018	2019	2020
Tuna vessels	40	40	40	40
Small pelagic trawlers	19	19	19	19
Other types of vessels	43	43	43	43
Total	102	102	102	102

Number of EU fishing authorisations taken by type and by year (same period)

Tuna vessels	33	32	34	32
Small pelagic trawlers	12	10	6	5
Other types of vessels	29	34	26	22
Total	74	76	66	59

- Total EU catch in the third country's waters (tonnes) in the last four years:**

	2017	2018	2019	2020
Highly migratory fishes	22 221	19 243	32 286	14 432
Small pelagic fishes	80 970	123 389	87 740	40 918
Other (marine) fishes	10 200	15 531	10 678	11 135
Cephalopods	96	309	115	86
Crustaceans	1 236	2 137	823	1 229
Total	114 723	160 609	131 642	67 800

- Estimated first sale value of EU total catch (annual average, million EUR):**

Period	2018-2020
Annual average	141.6

- **Interactions with the national fishing sector: situation in January 2019**

Employment of national seamen onboard EU vessels	Yes (compulsory) Protocol requirements: from 1 seafarer to a minimum of 60 % of the crew – outside officers - shall hold the Mauritanian citizenship depending on the fishing categories (small pelagic vessels being the latter condition)
Boarding of national scientific observers	Yes (compulsory) for EU non-tuna vessels, although a low ratio of coverage; EU vessels covered through different observer schemes Protocol requirement: two Mauritanian observers on board each year for non-EU tuna vessels Yes (voluntary) for EU tuna vessels – 100 % coverage on EU purse seiners and pole and line vessels through different programmes including Mauritanian observers among other nationalities
Landings / transshipping in national ports	Yes (compulsory – exemption in hot season for the EU shrimpers, voluntary for EU tuna vessels)
Sales of catch to national processing industry	No (products are either transhipped or reexported to the EU; a contribution in kind for the small pelagic vessels, these products are sold locally to a national company that distribute the products – unprocessed - to national consumers in the country including the inland territory; a similar mechanism for the EU shrimpers although not requested by the Mauritanian authorities)

- **Distribution of economic value-added (in kEUR and in %) – annual average 2016-2018:**

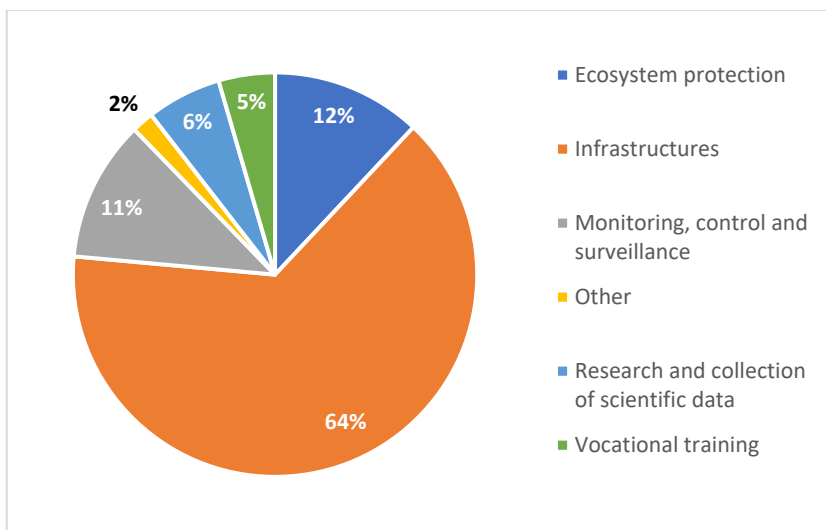
	EU	Partner country	Other entities	Total
Value	82 024	80 936	24 629	187 589
%	44 %	43 %	13 %	100 %

3-Sectoral support component

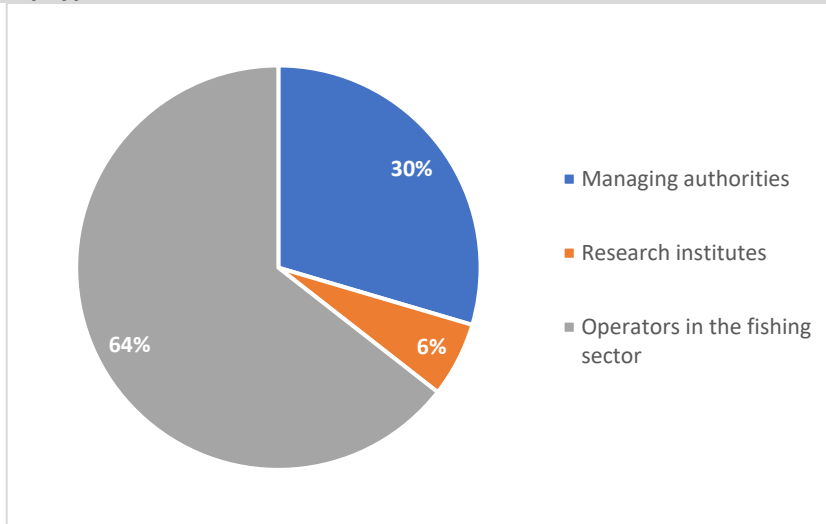
Total amount in EUR	
Previous Protocol (2012-2014)	6 000 000
Current Protocol (2015-2021)	16 500 000

- **Multiannual sectoral support programme**

By type of measures



By type of beneficiaries



- **Selected activities implemented by the sectoral support programme (period 2015 – 2019, situation in 2019 – using remaining funds from the Previous Protocol too)**

Activity

Infrastructure

The sectoral support contributed to the implementation of the national fisheries strategy in force during the Protocol especially with regards to landing sites.

As such, it provided, among other activities, funds to build a fishing port in Tanit (around 1h by car from Nouakchott). The official reception occurred in 2019. Almost 100 % of the funds from the 2012 – 2014 Protocol and a little over 50 % of the current sectoral support, were used to co-fund the port in Tanit (through funds reallocations during the period): the EU co-funded 20 % of the Port building total cost of approximately EUR 70 million. In the same period, the sectoral support using remaining funds from the two previous Protocols and the current Protocol enabled to support other measures this one (see below).

The Programme improved the artisanal fishing port infrastructure in Nouadhibou (EPBR) and participated to its maintenance, to improve an artisanal fishing landing site (kilometre point PK28) by enhancing its access by road and connecting it to the national electric network. It also funded studies to upgrade another landing site (PK144). It also enabled to build and equip new offices and training rooms for the Naval Academy in Nouadhibou.

Monitoring, control, and surveillance

Activity

The Programme funded the building of the new office of the fisheries surveillance services (GCM), equipped control antennas in two different control sites (PK144 and Tanit) and prepared the implementation of the electronic reporting implementation system, among other activities. GMS is also supported by a German fund.

Research and data collection

The sectoral support provided funds to repair the fisheries research vessel El Awam, a vessel used by the national fisheries institute (IMROP) for its scientific campaigns. It also provided equipment and training for research to IMROP.

Ecosystem protection

The Programme supported also the protection of the national park of Banc d'Arguin through the provision of funds to a fiduciary fund of the Park (BACoMaB), co-financed by different agencies including the French development organisation AFD and the French fund for Marine Environment. It also supported the national park PND for its management and awareness activities.

Sanitary control

The Programme supported the seafood safety competent authority (ONISPA) to prepare the EU seafood safety inspection: Mauritanian having for objectives to export bivalve molluscs in their national fisheries strategy. The support included training, the purchase of lab equipment, and office maintenance.

MAURITIUS

Background

Background information	
Population (2019)	1.3 million
GDP per capita (2019, current USD)	11 099 USD
Least developed Country (yes/no)	No
Income group	High income

Marine fisheries sector – context

- **National catches (evolution over 5 years, t per year): Indian Ocean**

Group of species	2015	2016	2017	2018	2019
Highly migratory fishes	10 786	13 096	19 463	23 750	28 345
Small pelagic fishes	-	-	-	-	-
Other (marine) fishes	4 468	4 469	4 851	4 864	5 133
Cephalopods	538	642	669	723	665
Crustaceans	4	4	4	2	0
Total	15 796	18 211	24 987	29 339	34 143

- **Access of foreign fleets to national waters:**

Group of fleets	Flag or group of States (ISO code), 2021 data
Tuna vessels	EU, Eastern Africa (SYC) Asia (CHN, KOR, MYS, OMN)
Non-tuna vessels	Absence of foreign industrial fleet

- **Cooperation with the EU to fight IUU fishing according to the EU regulation:**

Notification to the EU by the country of its competent authorities (yes/no)	Yes
Identified as non-cooperating country within the last 5 years (yes/no)	No (see table below)

Pre-identified ('yellow card')	Pre-identification revoked	Identified ('red card')	Listed	Delisted
NA	NA	NA	NA	NA

- **Authorisation to export fishery products for human consumption to the EU (in compliance with the EU seafood safety regulations):**

On the current list of third countries authorised to export (yes/no)	Yes
Nr of <u>land-based</u> establishments authorised to export to the EU (year)	14 (2020 and onwards)

- **Trade of fishery products exported to the EU28 (evolution over 5 years):**

Group of products - Quantity (t)	2015	2016	2017	2018	2019
Unprocessed fishery products	6 657	4 799	4 513	7 384	8 312
Processed fish products*	59 964	58 194	59 744	55 871	53 995
Total of fish products	66 621	62 994	64 256	63 255	62 307
Group of products – Value (kEUR)	2015	2016	2017	2018	2019
Unprocessed fishery products	21 807	21 695	21 217	25 681	28 999
Processed fish products*	234 936	223 708	262 432	248 381	228 929
Total of fish products	256 743	245 403	283 650	274 062	257 927

*: especially tuna cans and loins

- **Accession / ratification of international binding agreements:**

UNCLOS 1982 - internationally in force since 1994	Yes (1994)
UNFSA 1995 - since 2002	Yes (1997 – accession)
FAO (high seas fishing vessel) compliance agreement- since 2003	Yes (2003 – acceptance)
PSMA - since 2016	Yes (2015 – accession)
RFMO membership (year)	IOTC (1994)
ILO Convention C188 - since Nov. 2017	No
IMO STCW-F Convention - since 2012	No
Cape Town Agreement - not in force	No

- **Other key information (if any):** one of the regional hubs of tropical tuna processing - by presence of tuna canneries; Mauritius is the third largest supplier of tuna cans to the EU market after Ecuador and Philippines

Overview of the SFPA

1-General Data

Dates	
SFPA in force since	28/01/2014
Latest protocol applicable from – to (duration in years)	08/12/2017 - 07/12/2021 (4 years)

- **Groups of species authorised to catch by the Protocol:**

Fishes			Molluscs	Shellfish
Highly migratory	Demersal	Small pelagic	Cephalopods	Crustaceans
X				

- **Annual financial contribution foreseen by the Protocol (in EUR):**

For the 3 rd year and onwards	Amount
EU public budget for access*	220 000
EU shipowner's contribution for access (estimate**)	280 000
Subtotal access payments (A)	500 000
EU public budget for sectoral support (B)	355 000
Total (A+B)	855 000

* In the Protocol, based on an annual reference tonnage of 4 000 t of highly migratory species caught

** based on the reference tonnage above and EUR 70 per tonne of fish caught; not considered in the estimate, other costs such as the annual licence fee applicable by support vessel: EUR 4 000 per 'supply vessel' / year (term in the Protocol)

2-Access component

- **Number of EU fishing possibilities by type and by year in the last four years:**

Fishing vessel type	2017*	2018	2019	2020
Tuna vessels	NA*	85	85	85
Small pelagic trawlers	NA	NA	NA	NA
Other types of vessels	NA	NA	NA	NA
Total	NA*			

Number of EU fishing authorisations taken by type and by year (same period)

Tuna vessels	27*	27	27	27
Small pelagic trawlers	NA	NA	NA	NA
Other types of vessels	NA	NA	NA	NA
Total	27*	27	27	27

* Previous Protocol ended on 27/01/2017, current Protocol applied from 08/12/2017 – no EU vessel activities in 2017 due to the exclusivity clause when the SFPA was dormant (see next table)

- **Total EU catch in the third country's waters (tonnes) in the last four years:**

	2017	2018	2019	2020
Highly migratory fishes	-	2 583	4 407	1 539
Small pelagic fishes	NA	NA	NA	NA
Other (marine) fishes	NA	NA	NA	NA
Cephalopods	NA	NA	NA	NA
Crustaceans	NA	NA	NA	NA
Total	-	2 583	4 407	1 539

- **Estimated first sale value of EU total catch (annual average, million EUR):**

Period	2018-2020
Annual average	4.4

- **Interactions with the national fishing sector:**

Employment of national seamen onboard EU vessels	No (compulsory or a compensation payment) Protocol requirement: 12 Mauritian qualified seamen should embark on EU vessels during their activities in Mauritius waters. In the case of non-embarkation, EU shipowners must pay a compensation for the duration of the fishing campaign in the Mauritius waters
Boarding of national scientific observers	No (EU vessels covered through different observer programmes). EU purse seiners: 100% observer coverage (human and electronic) of their fishing operations wherever they operate Protocol requirement: EU vessels to be subject to a scheme for observing their fishing activities while in Mauritius waters. Observer scheme to be in compliance with the IOTC resolutions
Landings / transhipping in national ports	Yes (voluntary)
Sales of catch to national processing industry	Yes (voluntary)

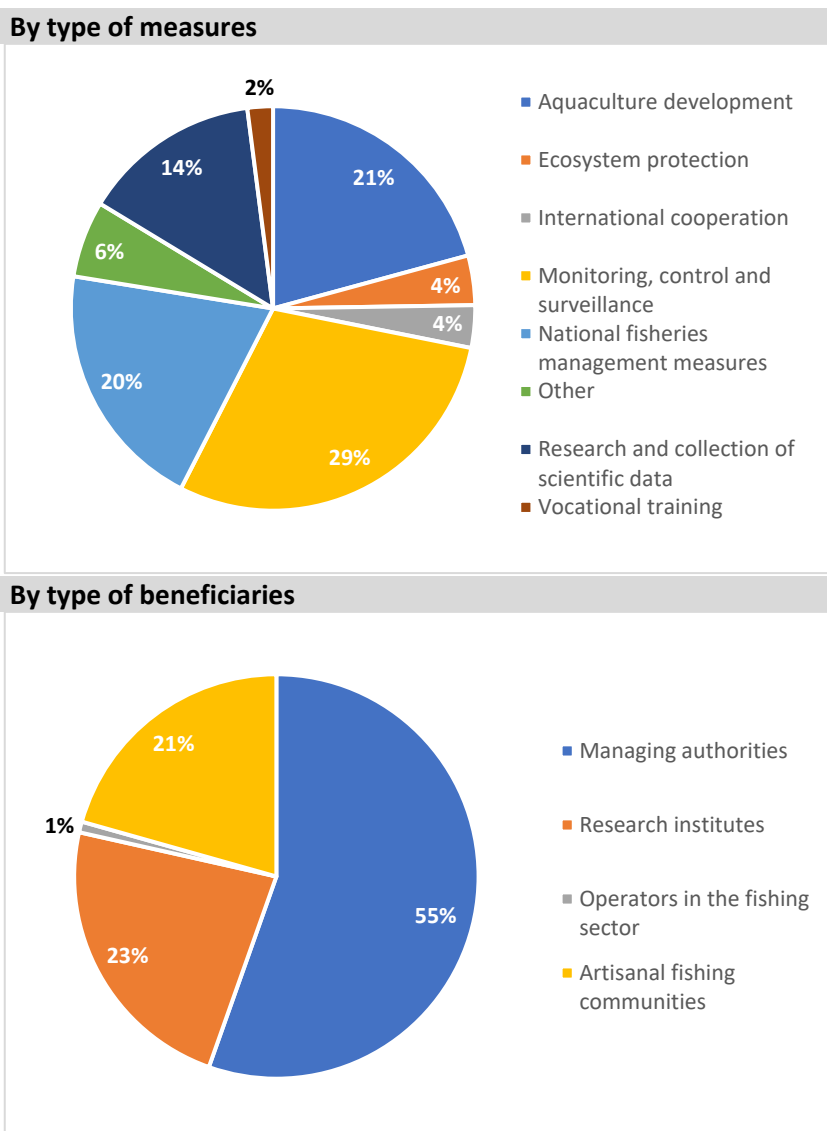
- **Distribution of economic value-added (in kEUR and in %) – annual average 2018-2019:**

	EU	Partner country	Other entities	Total
Value	2 418	1 207	1 091	4 716
%	51 %	26 %	23 %	100 %

3-Sectoral support component

Total amount in EUR	
Previous Protocol (2014- Jan. 2017)	907 500
Current Protocol (Dec. 2017-2021)	880 000

- **Multiannual sectoral support programme**



- **Selected activities implemented by the sectoral support programme (current Protocol)**

Activity

National fisheries management measures

The sectoral support programme supported the national schemes aiming at incentivising fishermen to exploit off-lagoons areas in view of the over-exploited status of most resources in the lagoons. The schemes facilitated acquisition of 50 new artisanal vessels and 3 semi-industrial vessels to exploit demersal resource available on the offshore banks (e.g. snappers, emperors).

Monitoring, control, and surveillance

The sectoral support programme contributed to increase the observer coverage of the national tuna fleet and to align performances with the international obligations stemming from IOTC membership. In addition, the sectoral support programme provides financial assistance for the development and the implementation of an Electronic Reporting System, and for the training of inspectors.

Aquaculture development

The sectoral support envelope was used for upscaling the research and extension services provided by Albion Fisheries Research Centre through modernisation of its hatcheries and purchase of equipment such as filters, pumps and air blower. This activity probably contributed to some extent to the increase of the national aquaculture production which almost tripled between 2017 and 2019

MOROCCO

Background

Background information	
Population (2019)	36.5 million
GDP per capita (2019, current USD)	3 204 USD
Least developed Country (yes/no)	No
Income group	Lower middle income

Marine fisheries sector – context

- **National catches (evolution over 5 years, t per year): Atlantic Ocean and adjacent seas**

Group of species	2015	2016	2017	2018	2019
Highly migratory fishes	10 785	9 416	17 954	14 087	13 245
Small pelagic fishes	1 117 253	1 210 724	1 144 209	1 174 320	1 233 507
Other (marine) fishes	112 040	100 386	101 222	92 695	97 537
Cephalopods	101 745	101 283	89 729	66 477	89 764
Crustaceans	8 112	8 501	7 443	7 767	7 829
Total	1 240 078	1 320 526	1 263 385	1 281 102	1 344 289

- **Access of foreign fleets to national waters:**

Group of fleets	Flag or group of States (ISO code), 2017 data
Tuna vessels	EU, Asia (JPN),
Non-tuna vessels	Eurasia (EU, RUS)

- **Cooperation with the EU to fight IUU fishing according to the EU regulation:**

Notification to the EU by the country of its competent authorities (yes/no)	Yes
Identified as non-cooperating country within the last 5 years (yes/no)	No (see table below)

Pre-identified ('yellow card')	Pre-identification revoked	Identified ('red card')	Listed	Delisted
NA	NA	NA	NA	NA

- **Authorisation to export fishery products for human consumption to the EU (in compliance with the EU seafood safety regulations):**

On the current list of third countries authorised to export (yes/no)	Yes*
Nr of <u>land-based</u> establishments authorised to export to the EU (year)	419 (2021)**

* inc. live, chilled, frozen, or processed bivalve molluscs, echinoderms, tunicates and marine gastropods;

** number excluding authorised establishments handling live bivalve molluscs

- **Trade of fishery products exported to the EU28 (evolution over 5 years):**

Group of products - Quantity (t)	2015	2016	2017	2018	2019
Unprocessed fishery products	136 786	156 082	154 160	140 247	156 877
Processed fish products	61 208	70 767	68 247	69 538	71 934
Processed shellfish*	17 925	27 894	8 799	13 364	16 134
Total of fish products	215 919	254 742	231 206	223 149	244 946
Group of products – Value (kEUR)	2015	2016	2017	2018	2019
Unprocessed fishery products	627 754	755 206	829 870	803 600	778 428
Processed fish products	286 369	322 570	311 392	325 529	335 077
Processed shellfish*	113 639	90 734	84 910	148 112	155 827
Total of fish products	1 027 761	1 168 509	1 226 172	1 277 240	1 269 332

* Including other aquatic invertebrates

- **Accession / ratification of international binding agreements:**

UNCLOS 1982 - internationally in force since 1994	Yes (2007)
UNFSA 1995 - since 2002	Yes (2012)
FAO (high seas fishing vessel) compliance agreement- since 2003	Yes (2001 – acceptance)
PSMA - since 2016	No
RFMO membership (year)	ICCAT (1969)
ILO Convention C188 - since Nov. 2017	Yes (2013)
IMO STCW-F Convention - since 2012	Yes
Cape Town Agreement - not in force	No

- **Other key information (if any):** Important fishing zone for EU vessels; including among others and not exclusively, small pelagic vessels (different EU MS), and vessels from the south of Spain and Canary Islands (EU Outermost region)

Overview of the SFPA

1-General Data

Dates	
SFPA in force since	18/07/2019
Latest protocol applicable from – to (duration in years)	18/07/2019 - 17/07/2023 (4 years)

- **Groups of species authorised to catch by the Protocol:**

Fishes			Molluscs	Shellfish
Highly migratory	Demersal	Small pelagic	Cephalopods	Crustaceans

X	X	X		X
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- Annual financial contribution foreseen by the Protocol (in EUR):**

For the 3 rd year and onwards	Amount
EU public budget for access	21 900 000
EU shipowner's contribution for access (estimate*)	12 700 000
Subtotal access payments (A)	34 600 000
EU public budget for sectoral support (B)	20 500 000
Total (A+B)	55 100 000

* In the Protocol; note: not considered above, other costs such as additional observer flat-rate fees

2-Access component

- Number of EU fishing possibilities by type and by year in the last four years:**

Fishing vessel type	2017*	2018*	2019	2020
Tuna vessels	27	27	27	27
Small pelagic trawlers	38	38	40	40
Other types of vessels	61	61	61	61
Total	126	126	128	128

Number of EU fishing authorisations taken by type and by year (same period)

Tuna vessels	7	7	5	5
Small pelagic trawlers	24	20	17	21
Other types of vessels	38	29	27	15
Total	69	56	49	41

* Previous Protocol

- Total EU catch in the third country's waters (tonnes) in the last four years:**

	2017	2018	2019	2020
Highly migratory fishes	869	1	158	432
Small pelagic fishes	80 088	11 388	53 414	92 827
Other (marine) fishes	2 621	1 069	1 111	627
Cephalopods	1	0	0	0
Crustaceans	0	0	0	0
Total	83 579	12 458	54 682	93 886

- Estimated first sale value of EU total catch (annual average, million EUR):**

Period	2018-2020
Annual average	80.5

- Interactions with the national fishing sector:**

Employment of national seamen onboard EU vessels	Yes (compulsory)
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	Protocol requirement: from 2 to 16 Moroccan seamen to employ – number increasing in relation to the size of the EU vessel, voluntary for one fishing category with vessel below 100 GT)
Boarding of national scientific observers	Yes for category 6 small pelagic industrial vessel (compulsory Protocol requirement: 100 % coverage required) Marginal for other categories (compulsory – protocol requirement: 25 % coverage min. for other categories on vessels being more than 100 GT, coverage of max. 10 fishing trips on vessels less than 100 GT)
Landings / transshipping in national ports	Yes (compulsory for some fishing categories)
Sales of catch to national processing industry	No (voluntary)

• **Distribution of economic value-added (in kEUR and in %) – annual average 2015-2016:**

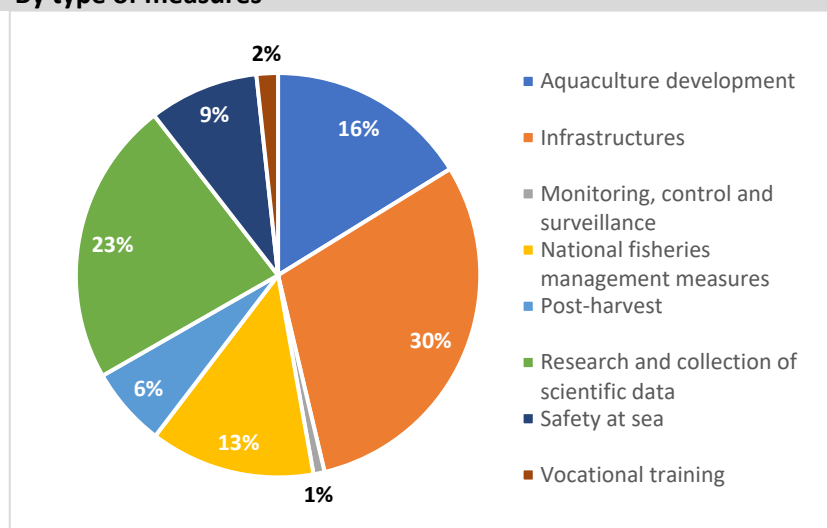
	EU	Partner country	Other entities	Total
Value	44 439	28 962	17 887	91 288
%	49 %	32 %	20 %	100 %

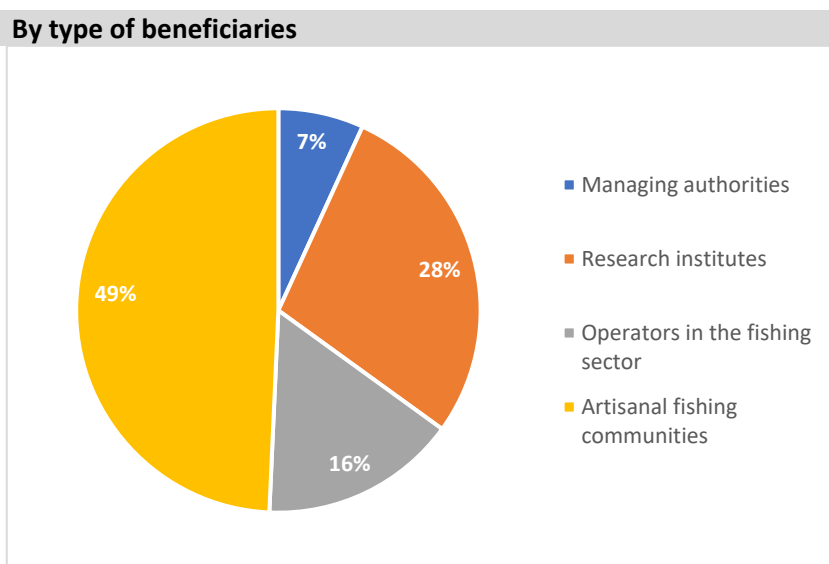
3-Sectoral support component

Total amount in EUR	
Previous Protocol (2014-2018)	56 000 000
Current Protocol (2019-2023)	77 700 000

• **Multiannual sectoral support programme**

By type of measures





- **Selected activities implemented by the sectoral support programme**

Activity

Infrastructures

Sectoral support funding was used to build and modernise several landing sites used by artisanal fishing communities in different locations. Activities included construction of new landing sites (*Points de débarquement aménagés*), including fish auctions, wholesale markets and social facilities (e.g. housing, medical care, schools) utilising renewable solar energy as appropriate.

Research and collection of scientific data

The sectoral support programme included funding of regular research surveys to monitor the abundance of demersal by trawl sampling and small pelagic species by acoustic methods. In addition, the programme included a specific research survey to explore the potential of rocky areas not covered by the regular research cruises, the deployment and the equipment (e.g. scales, rulers, freezers to keep samples) of a network of observers recruited among the artisanal communities to collect scientific information on catch and landings of the artisanal fleet, as well as an oceanographic buoys to collect indicators in real-time on hydrobiological conditions.

Vocational training

The sectoral support programme contributed to the acquisition of bridge simulators for the *Institut de Technologie des Pêches Maritimes* to enhance the training methods proposed to 120 trainees each year. In addition, the sectoral support programme funded the acquisition of a school ship to train an expected 150 fishers to the utilisation of fishing gears.

Aquaculture

The contribution of the sectoral support to the development of the aquaculture sector in Morocco included the construction of an experimental farm with a research laboratory to raise fish and shellfish. The activities also included the creation of a landing site to support aquaculture activities targeted on molluscs and seaweed developed by private entrepreneurs.

Safety at sea

The sectoral support programme funded the acquisition of a new rescue vessel to improve the responsiveness of Morocco in case of incidents at sea in the busy area of Tanger in line with the commitments of the country under the Search and Rescue international convention of the International Maritime Organisation.

Post harvest

Activities implemented under the sectoral support programme accompanied the generalisation of the utilisation of standardised containers (*contenants normalisés*) to store catches (construction of storage facilities for containers, acquisition of washing tunnels as well as the provision of handling equipment such as forklifts and conveyors). The activities contributed to a reduction in the volume of bulk landings (100%), an increase in the average price of marketed products and better monitoring of catches

SÃO TOMÉ-ET-PRÍNCIPE

Background

Background information	
Population (2019)	215 056
GDP per capita (2019, current USD)	1 947 USD
Least developed Country (yes/no)	Yes
Income group	Lower middle income

Marine fisheries sector – context

- **National catches (evolution over 5 years, t per year): Atlantic Ocean and adjacent seas**

Group of species	2015	2016	2017	2018	2019
Highly migratory fishes	3 266	2 529	2 521	57	78
Small pelagic fishes	605	603	520	450	488
Other (marine) fishes	7 547	8 576	7 787	7 853	5 357
Cephalopods	23	11	15	20	33
Crustaceans	-	-	-	-	-
Total	11 441	11 719	10 843	8 380	5 956

NB: FAO estimates in 2017 and 2018

- **Access of foreign fleets to national waters:**

Group of fleets	Flag or group of States (ISO code), 2019 data*
Tuna vessels	EU, Asia (JPN), Central and Latin America (different flag States)
Non-tuna vessels	Absence of foreign industrial fleet

*: 2019 World Bank [document](#): a background note by M. Serkovic and J. Million

- **Cooperation with the EU to fight IUU fishing according to the EU regulation:**

Notification to the EU by the country of its competent authorities (yes/no)	No
Identified as non-cooperating country within the last 5 years (yes/no)	No (see table below)

Pre-identified ('yellow card')	Pre-identification revoked	Identified ('red card')	Listed	Delisted
NA	NA	NA	NA	NA

- **Authorisation to export fishery products for human consumption to the EU (in compliance with the EU seafood safety regulations):**

On the current list of third countries authorised to export (yes/no)	No ¹⁴⁹
Nr of <u>land-based</u> establishments authorised to export to the EU (year)	NA

- **Trade of fishery products exported to the EU28 (evolution over 5 years): NA**

- **Accession / ratification of international binding agreements:**

UNCLOS 1982 - internationally in force since 1994	Yes (1987)
UNFSA 1995 - since 2002	No
FAO (high seas fishing vessel) compliance agreement- since 2003	No
PSMA - since 2016	Yes (2016 – accession)
RFMO membership (year)	ICCAT (1983)
ILO Convention C188 - since Nov. 2017	No
IMO STCW-F Convention - since 2012	No
Cape Town Agreement - not in force	Yes

- **Other key information (if any):** fishing zone for EU purse seine and longliners within the regional network of fishing zones to catch highly migratory species in the Gulf of Guinea.

Overview of the SFPA

1-General Data

Dates	
SFPA in force since	01/06/2006
Latest protocol applicable from – to (duration in years)	19/12/2019 - 18/12/2024 (5 years)

- **Groups of species authorised to catch by the Protocol:**

Highly migratory	Fishes		Molluscs	Shellfish
	Demersal	Small pelagic	Cephalopods	Crustaceans
X				

- **Annual financial contribution foreseen by the Protocol (in EUR):**

	Amount
EU public budget for access	400 000
EU shipowner's contribution for access (estimate*)	560 000
Subtotal access payments (A)	960 000
EU public budget for sectoral support (B)	440 000
Total (A+B)	1 400 000

* In the Protocol, based on a reference tonnage of 8 000 t of highly migratory species caught

** Figure from the Protocol and calculated on the basis of the reference tonnage above

¹⁴⁹ Not in the list at least since 2006 (analysis on COMEXT and on EUR-LEX)

2-Access component

- **Number of EU fishing possibilities by type and by year in the last four years:**

Fishing vessel type	2017*	2018*	2019	2020
Tuna vessels	34	34	34	34
Small pelagic trawlers	NA	NA	NA	NA
Other types of vessels	NA	NA	NA	NA
Total	34	34	34	34

Number of EU fishing authorisations taken by type and by year (same period)

Tuna vessels	28	28	25	25
Small pelagic trawlers	NA	NA	NA	NA
Other types of vessels	NA	NA	NA	NA
Total	28	28	25	25

* Previous Protocol, ended on 22/05/2018

- **Total EU catch in the third country's waters (tonnes) in the last four years:**

	2017	2018*	2019*	2020
Highly migratory fishes	5 028	236	-	3 401
Small pelagic fishes	NA	NA	NA	NA
Other (marine) fishes	NA	NA	NA	NA
Cephalopods	NA	NA	NA	NA
Crustaceans	NA	NA	NA	NA
Total	5 028	236	-	3 401

* Previous Protocol ended on 22/05/2018, new Protocol started on 29/12/2019; dormant SFPAs – exclusivity clause applied - between the two Protocols period explaining the low volume of catches in 2018 and the absence of catch in 2019

- **Estimated first sale value of EU total catch (annual average, million EUR):**

Period	2020
Annual average	5.1

- **Interactions with the national fishing sector: situation during the Protocol 2014 - 2018**

Employment of national seamen onboard EU vessels	No (voluntary) Protocol requirement: at least 20 % of the seamen signed on during the tuna-fishing season in the fishing zone of the third country shall be of São Toméan or possibly ACP origins
Boarding of national scientific observers	Yes (through different observer programmes) Protocol requirement: at the request of the competent São Toméan authorities, European Union vessels shall take on board an observer designated by the former to check catches made in São Toméan waters.
Landings / transshipping in national ports	No (voluntary)
Sales of catch to national processing industry	No (voluntary)

• **Distribution of economic value-added (in kEUR and in %) – annual average 2015-2016:**

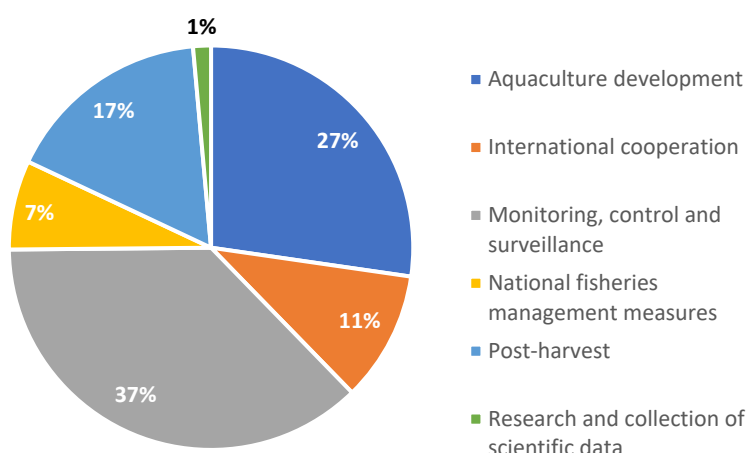
	EU	Partner country	Other entities	Total
Value	3 724	1 038	4 142	8 904
%	42 %	12 %	47 %	100 %

3-Sectoral support component

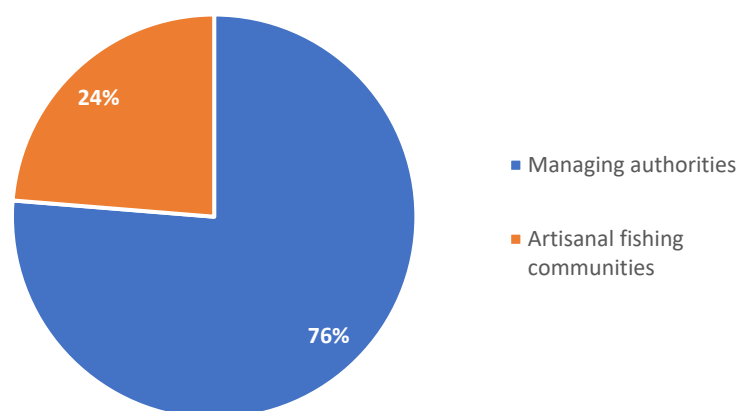
Total amount in EUR	
Previous Protocol (2014-2018)	1 300 000
Current Protocol (2019-2024)	2 200 000

• **Multiannual sectoral support programme**

By type of measures



By type of beneficiaries



- **Selected activities implemented by the sectoral support programme**

Activity
Monitoring, control, and surveillance The sectoral support programme funded the strengthening of the capacities of the national Fisheries Monitoring Centre, with modernisation of the VMS system and the development of the Electronic Reporting System (ERS), now operational.
Aquaculture development The ongoing multi-annual programme considers several activities to promote the development of integrated agriculture / aquaculture systems for small-scale holders including production of fingerlings of tilapia and transfer of technologies. The development of aquaculture of native species of mussels is also foreseen
Research and collection of scientific data The sectoral support programme includes activities to strengthen the capacities of the national authorities to collect information on catch and effort of the artisanal fleet through the deployment of a network of fifteen field surveyors and development of relevant process to harmonise and collate data at national level.

SENEGAL

Background

Background information	
Population (2019)	16.3 million
GDP per capita (2019, current USD)	1 447 USD
Least developed Country (yes/no)	Yes
Income group	Lower middle income

Marine fisheries sector – context

- **National catches (evolution over 5 years, t per year): Atlantic Ocean and adjacent seas**

Group of species	2015	2016	2017	2018	2019
Highly migratory fishes	21 672	37 105	43 052	46 142	51 980
Small pelagic fishes	275 335	301 891	307 830	251 023	312 034
Other (marine) fishes	73 361	76 584	118 047	121 015	88 496
Cephalopods	8 567	11 171	11 332	16 718	12 463
Crustaceans	2 782	4 896	8 015	6 216	3 546
Total	381 717	431 647	488 276	441 114	468 519

- **Access of foreign fleets to national waters:**

Group of fleets	Flag or group of States (ISO code), 2020 data*
Tuna vessels	EU, West Africa (CPV)
Non-tuna vessels	EU

* SFPA evaluation report 2019 and ICCAT Summary of Access Agreements, Oct. 2020 (Doc. No. COC-303-ANNEX 6)

- **Cooperation with the EU to fight IUU fishing according to the EU regulation:**

Notification to the EU by the country of its competent authorities (yes/no)	Yes
Identified as non-cooperating country within the last 5 years (yes/no)	No (see table below)

Pre-identified ('yellow card')	Pre-identification revoked	Identified ('red card')	Listed	Delisted
NA	NA	NA	NA	NA

- **Authorisation to export fishery products for human consumption to the EU (in compliance with the EU seafood safety regulations):**

On the current list of third countries authorised to export (yes/no)	Yes (only wild catch)
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Nr of <u>land-based</u> establishments authorised to export to the EU (year)	78 (2020 and onwards)
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- **Trade of fishery products exported to the EU28 (evolution over 5 years):**

Group of products - Quantity (t)	2015	2016	2017	2018	2019
Unprocessed fishery products	36 243	39 189	46 476	41 678	48 643
Processed fish products*	2 284	588	711	784	1 045
Total of fish products	38 527	39 777	47 187	42 462	49 687
Group of products – Value (kEUR)	2015	2016	2017	2018	2019
Unprocessed fishery products	170 890	174 064	214 264	233 651	238 558
Processed fish products*	7 363	1 951	2 796	3 093	3 436
Total of fish products	178 253	176 015	217 060	236 743	241 994

*: especially tuna cans

- **Accession / ratification of international binding agreements:**

UNCLOS 1982 - internationally in force since 1994	Yes (1984)
UNFSA 1995 - since 2002	Yes (1997)
FAO (high seas fishing vessel) compliance agreement- since 2003	Yes (2009 - acceptance)
PSMA - since 2016	Yes (2017 – accession)
RFMO membership (year)	ICCAT (2004)
ILO Convention C188 - since Nov. 2017	Yes (2018)
IMO STCW-F Convention - since 2012	No
Cape Town Agreement - not in force	No

- **Other key information (if any):** part of the EU purse seine tuna vessels' catches in the region landed in Senegal due to the presence of two tuna canneries; Dakar - port base of the EU pole and line vessels targeting tropical tuna in the Eastern Atlantic, and historically key fishing zone for their live baits; main hub of EU demersal vessels for landing or transshipment at port of their catches harvested in the coastal States' waters in the region

Overview of the SFPA

1-General Data

Dates	
SFPA in force since	20/11/2014
Latest protocol applicable from – to (duration in years)	18/11/2019 - 17/11/2024 (5 years)

- **Groups of species authorised to catch by the Protocol:**

Fishes			Molluscs	Shellfish
Highly migratory	Demersal	Small pelagic	Cephalopods	Crustaceans
X	X*			

* Limited to deep-water hake and associated species as by-catch

- **Annual financial contribution foreseen by the Protocol (in EUR):**

	Amount
EU public budget for access*	800 000
EU shipowner's contribution for access (estimate*)	1 350 750
Subtotal access payments (A)	2 150 750
EU public budget for sectoral support (B)	900 000
Total (A+B)	3 050 750

* Based on a reference tonnage of 10 000 t of highly migratory species caught

** Figure in the Protocol

2-Access component

- **Number of EU fishing possibilities by type and by year in the last four years:**

Fishing vessel type	2017*	2018*	2019*	2020
Tuna vessels	36	36	43	43
Small pelagic trawlers	NA	NA	NA	NA
Other types of vessels	2	2	2	2
Total	38	38	45	45

Number of EU fishing authorisations taken by type and by year (same period)

Tuna vessels	29	29	29	27
Small pelagic trawlers	NA	NA	NA	NA
Other types of vessels	4**	4**	3**	2
Total	33	33	32	29

* Previous Protocol; while complying with the limit of 2 vessels active at the same time in the Senegalese fishing zone

- **Total EU catch in the third country's waters (tonnes) in the last four years:**

	2017	2018	2019	2020
Highly migratory fishes	7 112	6 162	7 270	1 652
Small pelagic fishes	22	62	260	125
Other (marine) fishes	1 968	1 304	2 713	1 423
Cephalopods	134	65	90	40
Crustaceans	2	1	0	0
Total	9 238	7 594	10 333	3 240

- **Estimated first sale value of EU total catch (annual average, million EUR):**

Period	2017-2019
Annual average	12.6

- **Interactions with the national fishing sector: situation in 2019, previous Protocol**

Employment of national seamen onboard EU vessels	Yes (voluntary, a minimum number of ACP seafarers, preferably from Senegal, to employ) Protocol requirement: EU vessels in the exception of the pole and line (BB) vessels targeting tuna - at least 25 % of the seafarers signed on during the tuna-fishing season in Senegal's fishing zone shall be from Senegal or possibly from another ACP country; BB vessels 30 %
Boarding of national scientific observers	Yes (EU purse seiners covered through different observer programmes with some Senegal observers; for demersal trawlers and pole and line vessels, 100 % coverage with national scientific observers) Protocol requirement: EU vessels shall be subject to an observer scheme. Observer on board for demersal trawlers compulsory, the observation scheme shall comply with ICCAT requirements in terms of coverage for tuna vessels
Landings / transhipping in national ports	Yes (voluntary)
Sales of catch to national processing industry	Yes (voluntary)

- **Distribution of economic value-added (in kEUR and in %) – annual average 2015-2018:**

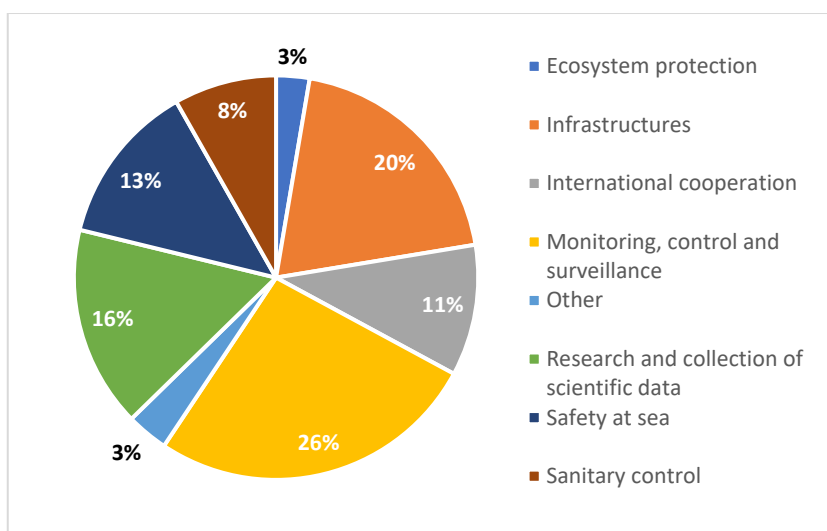
	EU	Partner country	Other entities	Total
Value	5 010	3 244	1 864	10 118
%	50 %	32 %	18 %	100 %

3-Sectoral support component

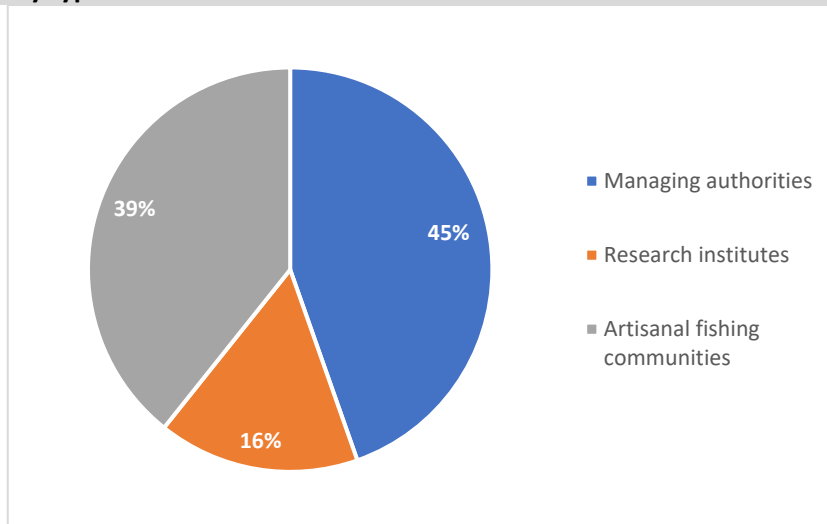
Total amount in EUR	
Previous Protocol (2014-2019)	3 750 000
Current Protocol (2019-2024)	4 500 000

- **Multiannual sectoral support programme**

By type of measures



By type of beneficiaries



- Selected activities implemented by the sectoral support programme

Activity

Infrastructure development

Modernisation of the artisanal landing facility at Ndangane Sambou was supported to provide artisanal fishing communities with improved infrastructures comprising a landing site meeting sanitary standards, a laboratory, a surveillance station and a meeting room. The renovated landing point will provide improved working conditions for fishers and the artisanal communities handling and processing the fish, also allowing high prices for fish for export. The sectoral support also contributed to the enlargement and sanitary equipment of the Hann/Dakar artisanal fishing quay

Ecosystem protection

Three decommissioned industrial trawlers that clogged the port of Dakar have been de-polluted and fitted with brick structures to provide more shelter for the marine species. Once sunk in a selected location, the ships became artificial reefs favouring colonisation by all kind of marine species supporting regeneration of resources of interest for artisanal fishing communities, while offering a natural protection against deployment of trawl gear.

Safety at sea

More than 22 000 life jackets were distributed to artisanal fishing communities to improve security at sea. In addition, about one hundred geolocalisation devices were purchased to equip certain

artisanal canoes to facilitate search and rescue operations while providing additional data sources for scientific programmes to analyse the fishing strategies of the artisanal fleet.

Research and collection of scientific data

An envelope was earmarked for the rehabilitation of the national research vessel ITAF DEME in critical need of extensive repair and maintenance to resume its research work on abundance of fisheries resources after several years of interruption. In addition, a network of field surveyors was deployed to improve the collection of scientific data on artisanal fisheries and increase the coverage of statistics in the national fisheries information system.

SEYCHELLES

Background

Background information	
Population (2019)	97 625
GDP per capita (2019, current USD)	17 448 USD
Least developed Country (yes/no)	No
Income group	High income

Marine fisheries sector – context

- **National catches (evolution over 5 years, t per year): Indian Ocean**

Group of species	2015	2016	2017	2018	2019
Highly migratory fishes	100 418	121 320	134 599	137 572	128 805
Small pelagic fishes	669	350	365	375	375
Other (marine) fishes	2 725	2 170	6 328	6 043	5 772
Cephalopods	15	11	36	40	40
Crustaceans	25	38	96	95	95
Total	103 852	123 889	141 424	144 125	135 087

NB: FAO estimates for crustaceans and cephalopods in 2018 and 2019

- **Access of foreign fleets to national waters:**

Group of fleets	Flag or group of States (ISO code), 2019 data*
Tuna vessels	EU, Eastern Africa (MUS), Asia (CHN, KOR, JPN, TWN)
Non-tuna vessels	Absence of foreign industrial fleet

* 2019 SFPAs evaluation report; and 2021 Seychelles 1st FiTI [report](#) (pp. 69 and 119) – access 8 June 2021

- **Cooperation with the EU to fight IUU fishing according to the EU regulation:**

Notification to the EU by the country of its competent authorities (yes/no)	Yes
Identified as non-cooperating country within the last 5 years (yes/no)	No (see table below)

Pre-identified ('yellow card')	Pre-identification revoked	Identified ('red card')	Listed	Delisted
NA	NA	NA	NA	NA

- **Authorisation to export fishery products for human consumption to the EU (in compliance with the EU seafood safety regulations):**

On the current list of third countries authorised to export (yes/no)	Yes (only wild catch)
Nr of <u>land-based</u> establishments authorised to export to the EU (year)	8 (2020 and onwards)

- **Trade of fishery products exported to the EU28 (evolution over 5 years):**

Group of products - Quantity (t)	2015	2016	2017	2018	2019
Unprocessed fishery products	14 401	17 382	18 162	27 321	17 911
Processed fish products*	44 747	55 667	51 805	48 668	39 618
Total of fish products	59 148	73 049	69 967	75 989	57 528
Group of products – Value (kEUR)	2015	2016	2017	2018	2019
Unprocessed fishery products	25 945	33 256	41 548	50 617	37 202
Processed fish products*	211 395	229 388	228 440	236 893	196 532
Total of fish products	237 341	262 643	269 988	287 510	233 734

*: especially tuna cans

- **Accession / ratification of international binding agreements:**

UNCLOS 1982 - internationally in force since 1994	Yes (1991)
UNFSA 1995 - since 2002	Yes (1998)
FAO (high seas fishing vessel) compliance agreement- since 2003	Yes (2000 – acceptance)
PSMA - since 2016	Yes (2013 – accession)
RFMO membership (year)	IOTC (1995)
ILO Convention C188 - since Nov. 2017	No
IMO STCW-F Convention - since 2012	No
Cape Town Agreement - not in force	No

- **Other key information (if any):** main logistical base for EU purse seiners (and Mauritian purse seiners) is Port-Victoria (Seychelles); also a major hub for the regional fishery sector, receiving and transshipping catches, not just from the EEZ but other fishing zones as well and for EU and other foreign fleets; hosts an important tuna cannery

Overview of the SFPA

1-General Data

Dates	
SFPA in force since	24/02/2020
Latest protocol applicable from – to (duration in years)	24/02/2020 - 23/02/2026 (6 years)

- **Groups of species authorised to catch by the Protocol:**

Highly migratory	Fishes		Molluscs	Shellfish
	Demersal	Small pelagic	Cephalopods	Crustaceans
X				

- **Annual financial contribution foreseen by the current Protocol (in EUR):**

For the 4 th year and onwards	Amount
EU public budget for access*	2 500 000
EU shipowner's contribution for access (estimate**)	4 400 000
Subtotal access payments (A)	6 900 000
EU public budget for sectoral support (B)	2 800 000
Total (A+B)	9 700 000

* In the Protocol, based on an annual reference tonnage of 50 000t of highly migratory species caught

** 'based on the estimated amount on the overall period of the Protocol: 26 400 000 EUR

corresponding to the estimated value of the fees paid by the ship-owners, including advance payments, fees per tonne of fish caught and a specific contribution dedicated to environmental management and observation of marine ecosystems in Seychelles waters' (Protocol art. 3)

2-Access component

- **Number of EU fishing possibilities by type and by year in the last four years:**

Fishing vessel type	2017*	2018*	2019*	2020*
Tuna vessels	46	46	46	46
Small pelagic trawlers	NA	NA	NA	NA
Other types of vessels	NA	NA	NA	NA
Total	46	46	46	46

Number of EU fishing authorisations taken by type and by year (same period)

Tuna vessels	28	28	29	32
Small pelagic trawlers	NA	NA	NA	NA
Other types of vessels	NA	NA	NA	NA
Total	28	28	29	32

* Previous Protocol

- **Total EU catch in the third country's waters (tonnes) in the last four years:**

	2017*	2018*	2019*	2020*
Highly migratory fishes	48 732	57 310	52 193	57 821
Small pelagic fishes	NA	NA	NA	NA
Other (marine) fishes	NA	NA	NA	NA
Cephalopods	NA	NA	NA	NA
Crustaceans	NA	NA	NA	NA
Total	48 732	57 310	52 193	57 821

* Previous Protocol

- **Estimated first sale value of EU total catch (annual average, million EUR):**

Period	2017-2019
Annual average	80.7

• **Interactions with the national fishing sector:**

Employment of national seamen onboard EU vessels	Yes – half compliance otherwise compensation paid (compulsory) Protocol requirement: EU vessels operating under the Agreement embark at least two qualified Seychellois seamen whilst operating in Seychelles waters otherwise a payment compensation for non-recruitment
Boarding of national scientific observers	Yes (active EU vessels only purse seiners; opportunities for longliners not used, no catch – situation analysed by the beginning of 2019) EU PS vessels 100 % covered through different observer programmes including remote observation (CCTV) Protocol requirement: EU vessels shall take onboard one observer nominated by the Seychelles Authorities in line with the IOTC requirement
Landings / transshipping in national ports	Yes (voluntary)
Sales of catch to national processing industry	Yes (voluntary)

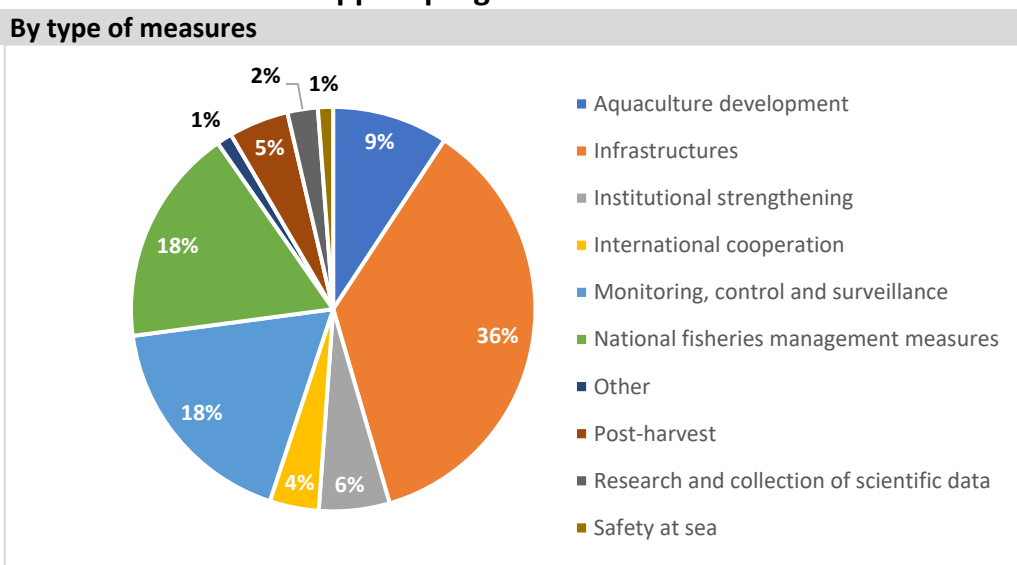
• **Distribution of economic value-added (in kEUR and in %) – annual average 2014-2018:**

	EU	Partner country	Other entities	Total
Value	23 913	13 392	17 810	55 115
%	43 %	24 %	32 %	100 %

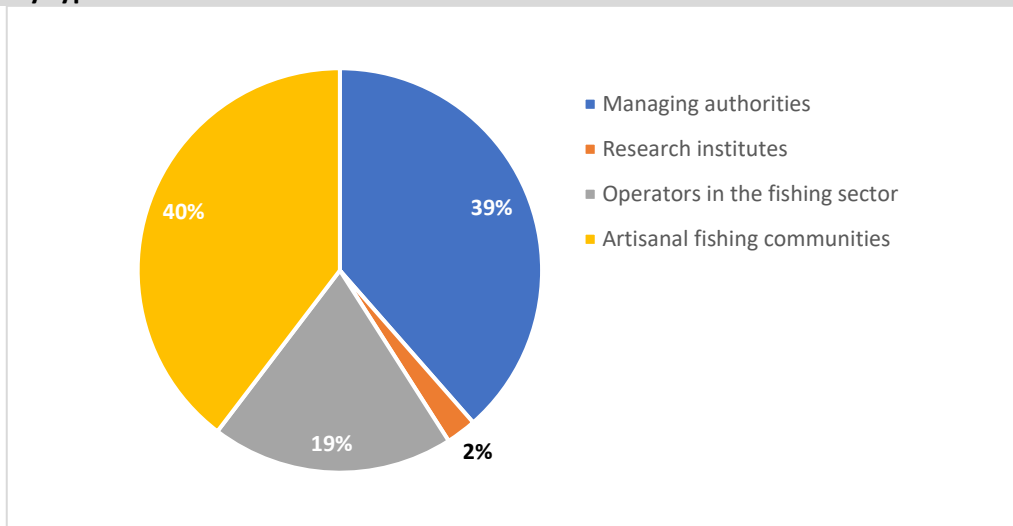
3-Sectoral support component

Total amount in EUR	
Previous Protocol (2014-2020)	12 700 000
Current Protocol (2020-2026)	16 800 000

• **Multiannual sectoral support programme**



By type of beneficiaries



- **Selected activities implemented by the sectoral support programme**

Activity

Infrastructures

sectoral support activities included infrastructure projects and mostly targeted improving the facilities (Bel Ombre, Zone Providence and other places in various districts) being used by the small-scale, artisanal fisheries sector. This included the construction of loading sheds, fishermen's gear stores, installation and maintenance of navigation aids, construction of slipways to facilitate the retrieval and launching of boats, construction of fish processing units and provision of necessary utilities (e.g. electricity substation, sewage treatment plant, water connections) for their effective functioning, among others.

National fisheries management measures

The sectoral funds have been used to develop management plans in the following areas i) Demersal fisheries Management Plan (DPM) for the Mahé Plateau, ii) the Shark National Plan of Action and iii) scientific research for the management of the lobster and sea cucumber fishery. The Demersal Fisheries Management Plan (DMP) which addresses sustainability of fish stocks on the Mahé Plateau, has now been turned into regulations. The development of the management plans benefited from sectoral support contributions to research with refurbishment of the R/V L'Amitié.

Monitoring, control and surveillance

EU sectoral support funds were used to modernize the fisheries information management system (FIMS) which consisted of harmonization of data capture software into two systems: a system to capture industrial and one to capture coastal fisheries data. For example, sea cucumber and lobster fishery research fall under the research section, both the Statistics Unit and the Research Section will be using one system. In addition, several seaborne and airborne patrols were organised, and the VMS system upgraded to ensure monitoring of national vessels wherever they operate, and foreign vessels authorised to access the fishing zone.

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