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# Ex-ante evaluation study of a possible Sustainable Fisheries Partnership Agreement between the European Union and the Republic of Angola

Final report

May 2023

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# Ex-ante evaluation study of a possible Sustainable Fisheries Partnership Agreement between the European Union and the Republic of Angola

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# SUMMARY


## Introduction, methodology and scope of the evaluation

1. **The first fisheries agreement between the European Community and Angola was signed in 1989 and denounced in 2006 by the EU, due to the legislative framework adopted in Angola in 2004.** EU vessels currently fishing in the Angolan exclusive economic zone (EEZ) do so on the basis of direct authorisations. Since 2019, Angola has showed interest in a sustainable fisheries partnership agreement (SFPA), and both the EU and Angola have agreed to initiate exploratory discussions about a SFPA.
2. **This ex-ante evaluation was carried out in accordance with both the EU Financial Regulation and its Rules of Application and the European Commission's Better Regulation Guidelines and 'Toolbox'**. A wide range of stakeholders in both the EU and Angola were consulted, the former largely using questionnaires with responses provided by email, and the latter through a field mission to Angola. A large body of relevant secondary data was also reviewed.

## General background to Angola and its fisheries sector

3. **Angola is located in Southern Africa, and has a population of around 35 million. It faces significant economic and social development challenges**. The civil war ended two decades ago and despite the country's rapid post-war economic growth based on oil production (oil accounts for 95 % of Angola's exports), a high percentage of Angolans live below the poverty line and unemployment is widespread. Angola is also facing the worst drought in the last 38 years. After the COVID-19 pandemic, the economy has undergone a modest recovery and the economic outlook is positive.
4. **It has a coastline of 1 650 km and an exclusive economic zone (EEZ) of 332 000 km$^2$.** The coastal zone is characterised by high biological productivity, inland water bodies are numerous, and fisheries is an important sector for the country.
5. **After a series of structural changes during the past legislatures, the fisheries sector is back under a fully-fledged Ministry of Fisheries and Marine Resources (MINPERMAR), due to a renewed interest of the government to develop this sector.** The Fisheries Act and related legislation is outdated and needs revision. The exploitation of fisheries resources is managed on an annual basis through management measures which specify input control measures (maximum number of vessel authorisations), output control measures (total allowable catches [TACs] and quotas), and technical measures (e.g. minimum mesh sizes, closed seasons and closed areas).
6. **The monitoring, control and surveillance system focusses on four main areas: i) inspection of landings, ii) inspectors on board industrial fishing (IF) vessels and semi-industrial fishing (SIF) vessels, iii) control of the movement of vessels with length overall (LOA) above 15 m by satellite (MONICAP system) and iv) surveillance at sea with dedicated inspection vessels,** under the responsibility of the National Inspection Service for Fisheries and Aquaculture (SNFPA). The SNFPA is equipped with 3 patrol vessels (one 30 m long and two 19 m long) and coastal boats, and operates in collaboration with two additional Navy vessels. With limited capacities (it only has 28 fisheries observers), it gives priority during inspections to the most problematic/vulnerable fisheries, i.e. small pelagics and demersal species and the vessels fishing for them. The major risks identified by the SNFPA in terms of IUU fishing are: fishing in excess of authorised quotas (industrial vessels and illegal unregulated and unreported (IUU) vessels transshipping fish to artisanal fishing vessels); failure to

respect minimum species and mesh sizes; very limited number of functional 'blue boxes' i.e. vessel monitoring systems, on board the IF and SIF fleets (28 functional for about 260 vessels); and difficulty in monitoring artisanal fisheries (since they are dispersed over 1 650 km of coastline).

7. **The National Fisheries Investigation Institute (INIP) is in charge of fisheries research. Recent and reliable information on the status of fish stocks found in the Angolan fishing zone is not widely available, but the status of stocks appears mixed**. In general there is little concern about highly migratory tuna and tuna-like species (for which information is robust) and cephalopods (which are moderately exploited), but many demersal fish and shrimp stocks, as well as small pelagic stocks, are fully or over-exploited, and/or information to assess the status of stocks status with certainty is limited.

8. **Fishing is administratively divided into four main segments, according to the size and technical characteristics of the vessels:** industrial, semi-industrial, artisanal and subsistence fishing. There is both marine and inland fishing, as well as aquaculture.

9. **The artisanal and subsistence fleet** is made up of mostly wooden boats, with or without engine, distributed among about 190 artisanal and subsistence fishing communities, with an estimated 7 900 artisanal marine fishing vessels (with 30 000 fishers and 16 900 women fish processors), fishing mostly with purse seines, gillnets, longlines, handlines and fish traps, with an average production of 100 000 to 235 000 tonnes per year; and 9 600 vessels engaged in inland fishing (40 000 fishers and 9 000 women processors), with a production of 10 000 to 30 000 tonnes per year.

10. **The semi-industrial fleet** uses vessels with wooden, fiberglass or steel hulls, with an overall length (LOA) up to 24 m and an engine power up to 850 horse power. Some have freezer capacity on board. Most of these vessels use purse seines and target small pelagics, and some are associated with fishing companies with onshore facilities and private jetty facilities. There are about 100 vessels, catching about 30 000 to 55 000 tonnes per year.

11. **The industrial fishing fleet** is made up of steel-hulled vessels with a LOA of more than 20 m and an engine of more than 240 horsepower. They use technologically advanced fishing methods, dominated by trawling (bottom and pelagic) and purse seine. Most of these vessels are equipped with freezing equipment. They transship catches in the Bay of Luanda (in the case of shrimp trawlers) or land catches in the main ports (Luanda, Lobito and Moçâmedes). Purse seiners land fish directly at the jetties of the fish processing companies they are associated with (particularly at Baía Farta/Benguela and Tômbua/Namibe). There are around 160 vessels, catching about 200 000 to 280 000 tonnes per year.

12. **For marine fisheries**, small pelagics represent around 75 % of total production volumes (sardinellas 39.6 % and horse mackerel 19.3 %), demersal fish 24 %, crustaceans 1.1 % and molluscs 0.5 %. In value terms (at first sale) pelagics represent 67 %, demersals 29 %, crustaceans 3 % and molluscs 1 %.

13. **The processing industry comprises processing factories and artisanal processing**. Over the past 15 years, there has been significant development of fish processing industry units (usually freezing small pelagics), mainly in Luanda, Baía Farta and Tômbua. Some companies, aiming at exports to the EU, have recently invested in 'state-of-the-art' projects, e.g. the companies Octosea in Baía Farta and Sicopal in Moçâmedes. Salted and dried fish, produced by a large number of small-scale processors (usually women) is traditionally consumed by the national population and exported to neighboring countries. Production of dried fish averaged 28 000 tonnes per year in the period 2018 - 2021. Frozen small

pelagics produced by the factories are sold by wholesalers in the national markets and exported regionally.

14. **Fish trade from/to Angola is important.** Due to the fish consumption habits of the Angolan population, and despite the high national production, there are significant imports of fish and fishery products. Most of these imports are frozen small pelagics (33 000 tonnes imported in 2018 and 13 000 tonnes in 2019, mainly from Mauritania), the quantities of imported horse mackerel being limited by annual presidential Decree. From 2018 to 2021, an annual average of about 8 000 tonnes of other fisheries products were imported. In terms of exports, during the 2018-2021 period, crustaceans represent 64 % of total values (with about 3 000 tonnes per year, mainly exported to Spain), followed by fish (31%) and molluscs (only 2 %) and others (3 %). Imports of fisheries products from the EU represent on average around 1 900 tonnes a year with a value of EUR 22 million, and the exports to the EU on average around 2 800 tonnes a year with a value of EUR 14 million.

15. **The aquaculture sector** is a priority for the government, and offers potential for growth and development. Inland aquaculture comprises subsistence and commercial production. Several inland commercial aquaculture units are already in operation, focusing almost exclusively on the production of tilapia using intensive processes, with improved seed and the use of formulated feed (there are several local private companies producing feeds). Most of these units have their own improved fingerling production facility. There are two tilapia larviculture centres (for production of juveniles) and two experimental aquaculture stations (for training and extension purposes). Marine aquaculture is practically non-existent; one coastal larviculture centre has recently been constructed near Luanda. Aquaculture production between 2018 and 2021 averaged 2 000 tonnes a year.

**Findings of the ex-ante evaluation**

16. **Shared needs of the EU and Angola relate primarily to sustainable exploitation of marine resources and combatting IUU fishing**, as required by policy and legislation of both parties, and the regional fisheries organisations the parties are members of. Ensuring sustainability would require the SFPA/Protocol to be directed at 'surplus resources'. Other shared needs include the need for a possible SFPA/Protocol to be concluded in the spirit of fair, transparent and equitable cooperation and to aim at sharing benefits fairly between the two parties. Another shared need is for a SFPA/Protocol to contribute to employment creation and economic development in coherence with other EU interventions.

17. **The needs of Angola in relation to the 'access component' of any SFPA/Protocol are to generate revenues** from the fisheries sector, and for EU vessels to comply with national legislation including taking onboard national crew and observers. **For the sectoral support component, Angola has expressed its priority needs as enhancing exports to the EU, developing mariculture and developing the national fleets.** Important will be to ensure no duplication, but rather synergy, with other donor activities and projects.

18. **EU tuna vessel and demersal fishing owner needs from a SFPA/Protocol are access on a secure multiannual basis to the Angolan fishing zone to support a network of regional fishing opportunities**, thereby enabling the fleet to match fishing strategy with available catches in the region (in the case of the tuna fleet), and securing their current presence (in the case of deep-sea shrimp and demersal fish fleets). EU operator needs for tuna fishing opportunities are estimated at 20-25 purse seine opportunities and an indicative reference

tonnage of around 5 000 – 7 000 tonnes per year, noting that existing catches can fluctuate considerably between years. The needs of other EU vessel types would most likely include fishing opportunities for the fleets currently fishing in Angola under direct authorisations (i.e. about 11 deep-sea shrimp trawlers and 3 demersal fish trawlers) and 'newcomers', comprising EU cephalopods trawlers as well as tuna surface longliners. Other needs expressed by the EU private sector are for small pelagics trawlers, but access for these vessels would not be aligned with sustainability requirements and the principle of surplus resources. All vessels would have a need to be able to land product at ports of choice based on prices and services provided by different ports (but could be incentivised to land product in Angola, for example through port improvements and/or reduced access fees for catches landed in Angola).

19. **The added value of EU involvement in an SFPA/Protocol would result from the financial contributions for sectoral support** that would be available to fund activities not supported by other donors or otherwise provided by the EU, or which current fisheries sector budgets are not sufficient to address. Added value would also be derived from the sectoral policy dialogue in coherence with support provided under other SFPAs in the region. EU involvement would also add value by increasing monitoring at the EU level of EU fishing vessel activities in the Angolan fishing zone. Other added value would be the contribution to strengthening the role of the EU in the region - the EU's role in the International Commission for the Conservation of Atlantic Tuna (ICCAT), and potentially the Fishery Committee for the Eastern Central Atlantic (CECAF) and the Ministerial Conference on fisheries cooperation among African States bordering the Atlantic Ocean (ATLAFCO) would be strengthened if it were representing EU vessels fishing in Angolan waters under a SFPA/Protocol.

20. **Lessons learned from the past include:** i) in some cases, the less than full utilisation of fishing opportunities and reference tonnage provided in different SFPAs; ii) the risks of government fisheries departments not be able to fully absorb and utilise sectoral support funding; iii) the advantages of having multi-year Protocols of 5-6 years which provide greater certainty to both parties; and iv) the significant economic and social benefits to both the EU and third countries that can result from SFPAs/Protocols.

21. **Objectives of a SFPA/Protocol are derived from multiple sources** - from the needs of both parties, the requirements of the common fisheries policy (CFP) (Article 31), Council Regulation (EC) No 1005/2008 (the 'IUU Regulation'), UNCLOS (Article 62), and United Nations Sustainable Development Goal 14. General objectives (supported by a number of specific objectives) are defined as: i) resource conservation and environmental sustainability ensured through rational and sustainable exploitation of Angola's living marine resources; ii) protection provided for the financial viability of the EU fishing fleet operating in the Eastern Atlantic Ocean, and for the employment linked to fleet activities both in the EU and in Angola; and iii) a sustainable fisheries sector developed in Angola, and Angola integrated into the global economy.

22. **This evaluation considers three policy options**. Option 1 is 'No SFPA/Protocol'. Under this option, the current situation would remain (i.e. tuna purse seiners, deep-sea shrimp and demersal fish trawlers operating in the Angolan waters under direct authorisations would continue to do so). Option 2 considers 'A tuna-only SFPA/Protocol' and would provide fishing opportunities for tuna and tuna-like species (i.e. the present tuna purse seiners, plus surface longliners for tuna as 'newcomers'). Option 3 is 'A mixed species SFPA/Protocol' with access for demersal fish/shrimp/cephalopod vessels as well as tuna vessels, but not to small pelagic species given concerns over the status of fish stocks.

23. **Option 3, a 'Mixed species SFPA/Protocol', is the preferred option**. It would require that the Angolan legislation (in particular the 2004 Fisheries Act and regulations) be updated. It would support, and be consistent with, sustainable resource exploitation, provided that: i) the status of stocks are properly monitored and show improvements; and ii) for those stocks that are fully exploited, additional EU vessels would not increase the total number of foreign vessels fishing for those stocks. Option 3 would be effective in achieving the objectives, relevant to needs, coherent with EU fisheries and cooperation policy, and acceptable to stakeholders. Its efficiency would be dependent on the detailed content of the negotiated Protocol, and should be evaluated ex-post. It would represent a win-win situation for the EU and Angola in addressing the identified needs of the different stakeholders.

24. **The volume of appropriations, human resources and other EU administrative expenditure would be determined by levels of financial contribution to be paid by the EU to Angola for access and sectoral support**. The exact amounts involved would depend on: the reference tonnage included in the SFPA/Protocol; the price agreed for the catch; the actual utilisation of the SFPA/Protocol; and the relative contributions to be made by a) the EU and b) EU vessel owners. Existing staff in both EU and Angolan institutions would be able to handle any time inputs involved in negotiating/monitoring the SFPA/Protocol.

25. **Planning and future monitoring and evaluation for implementation for the preferred option should take place based on a logframe for the intervention with associated indicators, and means of verification**, which could be used to monitor implementation and in any ex-post evaluation. The EU and Angola should jointly agree on a sectoral support matrix and ensure ongoing monitoring/evaluation through a technical dialogue between the country's authorities and the EU Delegation in Angola, with a Joint Committee meeting at least once a year to assess success in implementing the sectoral support matrix, and a Joint Scientific Committee meeting regularly to analyse information on the status of stocks and come up with management recommendations. It is important that relevant stakeholders (including civil society) are involved in all the steps of planning and implementation of the SFPA/Protocol.

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# RESUMO


## Introdução, metodologia e âmbito da avaliação

1. **O primeiro acordo de pesca entre a Comunidade Europeia e Angola foi assinado em 1989 e denunciado em 2006 pela UE, devido ao quadro legislativo adotado em Angola em 2004.** Os navios da UE que pescam atualmente na zona económica exclusiva (ZEE) de Angola fazem-no com base em autorizações diretas. Desde 2019, Angola tem demonstrado interesse num acordo de parceria no domínio da pesca sustentável (APPS), e tanto a UE como Angola concordaram em iniciar discussões exploratórias sobre um APPS.

2. **Esta avaliação ex-ante foi realizada em conformidade com o Regulamento Financeiro da UE e as suas Normas de Execução e com as Orientações e o Conjunto de Ferramentas da Comissão Europeia para legislar melhor.** Um vasto leque de interessados foi consultado, tanto na UE como em Angola, tendo os primeiros sido consultados em grande parte, utilizando questionários com respostas fornecidas por correio eletrónico, e os segundos através de uma missão no terreno, a Angola. Foi também revisto um grande conjunto de dados secundários relevantes.

## Contexto geral de Angola e do seu setor pesqueiro

3. **Angola está localizada na África Austral, tem uma população de cerca de 35 milhões de habitantes, e enfrenta desafios significativos em termos de desenvolvimento económico e social**. A guerra civil terminou há duas décadas e apesar do rápido crescimento económico do país no pós-guerra, baseado na produção petrolífera (o petróleo representa 95 % das exportações de Angola), uma elevada percentagem de angolanos vive abaixo do limiar da pobreza e o desemprego é generalizado. Angola enfrenta também a pior seca dos últimos 38 anos. Após a pandemia da COVID-19, a economia tem tido uma recuperação modesta e as perspetivas económicas são positivas.

4. **Tem uma linha costeira de 1 650 km e uma zona económica exclusiva (ZEE) de 332 000 km².** A zona costeira é caraterizada por uma elevada produtividade biológica, as massas de água interiores são numerosas e a pesca é um setor importante para o país.

5. **Após uma série de mudanças estruturais ocorridas durante as legislaturas anteriores, o setor das pescas está de novo sob a tutela de um Ministério das Pescas e Recursos Marinhos (MINPERMAR) de pleno direito, devido ao interesse renovado do Governo no desenvolvimento do setor.** A Lei das Pescas e legislação conexa estão desatualizadas e necessitam de ser revistas. A exploração dos recursos pesqueiros é gerida numa base anual através de Medidas de Gestão que especificam medidas de controlo do esforço de pesca (número máximo de autorizações de navios), medidas de controlo das capturas (totais admissíveis de capturas [TAC] e quotas), e medidas técnicas (por exemplo, malhagens mínimas, períodos de defeso e zonas de defeso).

6. **O sistema de monitorização, controlo e vigilância, sob a responsabilidade do Serviço Nacional de Fiscalização das Pescas e Aquicultura (SNFPA), concentra-se em quatro áreas principais: i) inspeção dos desembarques, ii) inspetores a bordo de navios de pesca industrial (PI) e semi-industrial (PSI), iii) monitorização por satélite dos movimentos de navios com um comprimento total (LOA) superior a 15m (sistema MONICAP), e iv) vigilância no mar utilizando navios dedicados à inspeção**. O SNFPA está equipado com 3 navios de patrulha (um de 30 m de comprimento e dois de 19 m de comprimento) e embarcações costeiras, e opera em colaboração com mais dois navios da Marinha. Com capacidades limitadas (tem apenas 28 observadores de

pesca), o SNFPA dá prioridade durante as inspeções às pescarias mais problemáticas/vulneráveis, isto é, às pescarias que têm por alvo as pequenas espécies pelágicas e demersais e os navios que as capturam. Os principais riscos identificados pelo SNFPA em termos de pesca INN são: a pesca para além das quotas autorizadas (navios industriais e navios de pesca INN, que transbordam peixe para navios de pesca artesanal); o incumprimento dos tamanhos mínimos de captura por espécies e das malhagens; o número muito limitado de "caixas azuis" funcionais, isto é, de sistemas de monitorização de navios a bordo das frotas de PI e de PSI (28 funcionais para cerca de 260 embarcações); e dificuldade na monitorização da pesca artesanal (dispersa ao longo de 1 650 km de costa).

7. **O Instituto Nacional de Investigação de Pesca (INIP) é responsável pela investigação pesqueira. Informação recente e fiável sobre o estado das populações de peixe encontrados na zona de pesca angolana não está amplamente disponível, mas o estado das populações parece ser misto.** Em geral, há pouca preocupação sobre as populações de peixe altamente migratórias como o atum e espécies afins (para as quais a informação é robusta) e sobre as populações de cefalópodes (que são moderadamente exploradas), mas muitas populações de peixes demersais e de camarão, bem como as populações de pequenos pelágicos, são exploradas na totalidade ou sobre-exploradas, e/ou a informação para realizar uma avaliação fiável do estado das populações é limitada.

8. **A pesca está administrativamente dividida em quatro segmentos principais, de acordo com o tamanho e caraterísticas técnicas das embarcações:** pesca industrial, semi-industrial, artesanal e de subsistência. A pesca tem lugar tanto no mar como em águas interiores, assim como a aquicultura.

9. **A frota artesanal e de subsistência** é principalmente constituída por barcos de madeira, com ou sem motor, distribuídos por cerca de 190 comunidades de pesca artesanal e de subsistência, com aproximadamente 7 900 navios de pesca artesanal marítima (com 30 000 pescadores e 16 900 mulheres processadoras de peixe), pescando na sua maioria com redes de cerco, redes de emalhar, palangres, linhas de mão e armadilhas, com uma produção média de 100 000 a 235 000 toneladas por ano; e 9 600 navios envolvidos na pesca em águas interiores (com 40 000 pescadores e 9 000 mulheres preparadoras), com uma produção de 10 000 a 30 000 toneladas por ano.

10. **A frota semi-industrial** utiliza navios com cascos de madeira, fibra de vidro ou aço, com um comprimento fora a fora de até 24 m e uma potência de motor de até 850 cavalos. Alguns têm capacidade de congelação a bordo. A maioria destes navios utiliza redes de cerco e visa pequenos pelágicos, estando alguns associados a empresas pesqueiras com instalações em terra e ponte-cais privadas. Existem cerca de 100 navios, que capturam à volta de 30 000 a 55 000 toneladas por ano.

11. **A frota de pesca industrial** é constituída por navios de casco de aço com um comprimento fora a fora de mais de 20 m e um motor de mais de 240 cavalos de potência. Utilizam métodos de pesca tecnologicamente avançados, dominados pelo arrasto (de fundo e pelágico) e pela rede de cerco. A maioria destas embarcações está equipada com equipamento de congelação. Estes navios transbordam as capturas na Baía de Luanda (no caso dos arrastões de camarão) ou desembarcam as capturas nos principais portos comerciais (Luanda, Lobito e Moçâmedes). Os cercadores com rede de cerco desembarcam peixe diretamente nas ponte-cais das empresas de transformação às quais estão associados (particularmente na Baía Farta/Benguela e Tômbua/Namibe). Existem cerca de 160 navios, que capturam à volta de 200 000 a 280 000 toneladas por ano.

12. **No que diz respeito à pesca marítima**, os pequenos pelágicos representam cerca de 75 % do volume total de produção (sardinha 39,6 % e carapau 19,3 %), os peixes demersais 24 %, os crustáceos 1,1 % e os moluscos 0,5 %. Em termos de valor (à primeira venda), os pelágicos representam 67 %, os demersais 29 %, os crustáceos 3 % e os moluscos 1 %.
13. **A indústria de processamento inclui fábricas de processamento e processamento artesanal**. Nos últimos 15 anos, tem havido um desenvolvimento significativo de unidades de transformação de peixe (geralmente no congelamento de pequenos pelágicos), principalmente em Luanda, Baía Farta e Tômbua. Algumas empresas, visando a exportação para a UE, investiram recentemente em projetos última geração, por exemplo Octosea na Baía Farta e Sicopal em Moçâmedes. O peixe salgado e seco, produzido por um grande número de pequenos procesadores (geralmente mulheres) é tradicionalmente consumido pela população nacional e exportado para os países vizinhos. A produção de peixe seco foi em média de 28 000 toneladas por ano durante o período de 2018 - 2021. Os pequenos pelágicos congelados produzidos pelas fábricas são vendidos pelos grossistas nos mercados nacionais e exportados a nível regional.
14. **O comércio de peixe de/para Angola é importante.** Devido aos hábitos de consumo de peixe da população angolana, e apesar da elevada produção nacional, as importações de peixe e de produtos da pesca são significativas. A maioria destas importações são pequenos pelágicos congelados (33 000 toneladas importadas em 2018 e 13 000 toneladas em 2019, vindos principalmente da Mauritânia), estando as quantidades de carapau importado limitadas por decreto presidencial anual. De 2018 a 2021, foram importadas uma média anual de cerca de 8 000 toneladas de outros produtos da pesca. Em termos de exportações, para o período 2018-2021, os crustáceos representam 64 % dos valores totais (com cerca de 3 000 toneladas por ano, exportados principalmente para Espanha), seguidos pelos peixes (31 %), pelos moluscos (apenas 2 %) e outros (3 %). As importações de produtos da pesca da UE representam em média cerca de 1 900 toneladas por ano, com um valor de 22 milhões de euros, e as exportações para a UE são em média de cerca de 2 800 toneladas por ano, com um valor de 14 milhões de euros.
15. O setor da aquicultura é uma prioridade para o Governo, e oferece potencial de crescimento e desenvolvimento. A aquicultura em águas interiores inclui tanto a produção de subsistência como a comercial. Várias unidades de aquicultura comercial em águas interiores já estão em funcionamento e concentram-se quase exclusivamente na produção de tilápia utilizando processos intensivos, com linhas genéticas melhoradas e a utilização de rações formuladas para a aquicultura (existem várias empresas privadas locais que produzem rações). A maioria destas unidades tem as suas próprias instalações de produção de alevinos melhorados. Existem dois centros de larvicultura de tilápia (para a produção de alevinos) e duas estações de aquicultura experimental (para fins de treino e extensão). A aquicultura marinha é praticamente inexistente; foi recentemente construído um centro costeiro de larvicultura perto de Luanda. A produção aquícola entre 2018 e 2021 foi, em média, de 2 000 toneladas por ano.

**<u>Conclusões da avaliação ex-ante</u>**

16. **As necessidades partilhadas da UE e de Angola relacionam-se principalmente com a exploração sustentável dos recursos marinhos e a luta contra a pesca INN**, tal como exigido pela política e legislação de ambas as partes, bem como das organizações regionais de pesca das quais são ambas membros. Para assegurar a sustentabilidade, seria necessário que oAPPS/Protocolo se concentrasse nos "recursos excedentários". Outras necessidades comuns incluem a necessidade de um possível APPS/Protocolo a ser

concluído num espírito de uma cooperação justa, transparente e equitativa e de visar uma partilha justa dos benefícios entre ambas as partes. Outra necessidade partilhada é que um APPS/Protocolo deve contribuir para a criação de emprego e para o desenvolvimento económico em coerência com outras intervenções da UE.

17. **As necessidades de Angola no que respeita à "componente de acesso" de qualquer APPS/Protocolo são de gerar receitas** do sector das pescas e assegurar que os navios da UE cumpram a legislação nacional, incluindo o embarque de tripulantes e de observadores nacionais. No que diz respeito à componente de apoio setorial, Angola indicou que as suas necessidades prioritárias são aumentar as exportações para a UE, desenvolver a maricultura e desenvolver as frotas nacionais. Será importante assegurar que não haja duplicação, mas sim sinergia, com as atividades e projetos de outros doadores.

18. **As necessidades dos armadores de pesca de atum e de pesca demersal da UE ao abrigo de um APPS/Protocolo dizem respeito ao acesso, numa base plurianual segura, à zona de pesca angolana, a fim de apoiar uma rede de oportunidades de pesca regional**, permitindo assim à frota de adaptar a estratégia de pesca às capturas disponíveis na região (no caso da frota atuneira), e assegurar a sua presença atual (no caso das frotas de camarão de profundidade e de pesca demersal). As necessidades dos operadores da UE em termos de oportunidades de pesca do atum estão estimadas em 20-25 oportunidades de pesca com redes de cerco e uma tonelagem de referência indicativa de cerca de 5 000 - 7 000 toneladas por ano, tendo em conta que as capturas existentes podem flutuar consideravelmente de ano para ano. As necessidades de outros tipos de navios da UE incluiriam muito provavelmente oportunidades de pesca para as frotas que pescam atualmente em Angola ao abrigo de autorizações directas (ou seja, cerca de 11 arrastões de pesca do camarão de profundidade e 3 arrastões de pesca demersal) e "novos operadores", incluindo arrastões de cefalópodes da UE, bem como palangreiros de superfície ao atum. Outras necessidades expressas pelo setor privado da UE relacionam-se com os arrastões de pesca de pequenos pelágicos, mas o acesso para estes navios não estaria alinhado com os requisitos de sustentabilidade e o princípio de recursos excedentários. Todos os navios teriam necessidade de poder desembarcar os produtos nos portos da sua escolha, tendo por base os preços e os serviços prestados pelos diferentes portos (mas poderiam ser incentivados a desembarcar os seus produtos em Angola, por exemplo através de melhoramentos portuários e/ou através da redução das taxas de acesso para as capturas desembarcadas em Angola).

19. **O valor acrescentado do envolvimento da UE num APPS/Protocolo resultaria das contribuições financeiras para o apoio setorial** que estariam disponíveis para financiar atividades não apoiadas por outros doadores ou de outra forma fornecidas pela UE, ou que os orçamentos atuais do sector das pescas são insuficientes para tratar. O valor acrescentado resultaria também do diálogo político setorial em coerência com o apoio prestado ao abrigo de outros APPSs na região. O envolvimento da UE também acrescentaria valor ao aumentar o controlo a nível da UE das atividades dos navios de pesca da UE na zona de pesca angolana. Outro valor acrescentado seria a contribuição para o reforço do papel da UE na região. O papel da UE no ICCAT, e potencialmente no Comité das Pescas do Atlântico Centro-Este (CECAF), assim como na Conferência Ministerial dos Estados Africanos Ribeirinhos do Atlântico (ATLAFCO) seria reforçado se representasse navios da UE que pescam em Angola ao abrigo de um APPS/Protocolo.

20. **As lições que se aprenderam com o passado incluem:** i) em alguns casos, a utilização incompleta das oportunidades de pesca e da tonelagem de referência prevista nos diferentes APPSs; ii) o risco que os departamentos governamentais das pescas não possam absorver e utilizar plenamente o financiamento da

componente de apoio setorial; iii) as vantagens de ter protocolos plurianuais de 5-6 anos que proporcionam uma maior segurança a ambas as partes; e iv) os benefícios económicos e sociais significativos tanto para a UE como para os países terceiros que podem resultar dos APPSs/Protocolos.

21. **Os objetivos de um APPS/Protocolo derivam de múltiplas fontes** - das necessidades de ambas as partes, dos requisitos da Política Comum das Pescas (PCP) (artigo 31.º), do Regulamento (CE) n.º 1005/2008 do Conselho (o "Regulamento INN"), UNCLOS/CNUDM (artigo 62.º), e do Objetivo 14 das Nações Unidas para o Desenvolvimento Sustentável. Os objetivos gerais (apoiados por uma série de objectivos específicos) são definidos da seguinte forma: i) conservação dos recursos e sustentabilidade ambiental assegurada através de uma exploração racional e sustentável dos recursos marinhos vivos de Angola; ii) proteção assegurada da viabilidade financeira da frota de pesca da UE que opera no Oceano Atlântico Oriental, e do emprego ligado às atividades da frota tanto na UE como em Angola; e iii) um setor pesqueiro sustentável desenvolvido em Angola, e a integração de Angola na economia global.

22. **Esta avaliação considera três opções estratégicas.** A opção 1 é "Sem APPS/Protocolo". No âmbito desta opção, a situação atual manter-se-ia (ou seja, os atuneiros com rede de cerco, os arrastões de camarão de profundidade e de pesca demersal que operam nas águas angolanas sob autorização direta continuariam a fazê-lo). A opção 2 considera "Um APPS/Protocolo apenas para o atum" que proporcionaria oportunidades de pesca de atum e espécies afins (ou seja, considera os atuais atuneiros com rede de cerco, assim como palangreiros de superfície para o atum como "novos participantes"). A opção 3 considera um "APPS/Protocolo de espécies mistas" que permitiria o acesso a navios de pesca demersal de peixe/camarão/cefalópodes, bem como a atuneiros, mas não a navios que exercem a pesca de pequenos pelágicos, dadas as preocupações sobre o estado dos recursos pesqueiros.

23. **A opção 3, uma 'APPS/Protocolo de espécies mistas', é a opção preferida.** Exigiria uma atualização da legislação angolana (em particular da Lei das Pescas de 2004 e regulamentos afins). Apoiaria, e seria coerente com a exploração sustentável dos recursos, desde que: i) o estado das unidades populacionais fosse devidamente monitorizado e mostrasse melhorias; e ii) para as unidades populacionais totalmente exploradas, a adição de navios da UE não aumente o número total de navios estrangeiros que pescam essas unidades populacionais. A opção 3 seria eficaz na realização dos objetivos, satisfaria as necessidades, seria coerente com a política de pescas e de cooperação da UE, e seria aceitável para as partes interessadas. A sua eficácia dependeria do conteúdo detalhado do protocolo negociado e deveria ser avaliada ex-post. Representaria uma situação vantajosa para a UE e Angola ao satisfazer as necessidades identificadas pelas diferentes partes interessadas.

24. **O volume das dotações, recursos humanos e outras despesas administrativas da UE seria determinado pelos níveis de contribuição financeira a ser feito pela UE a Angola para acesso e apoio setorial.** Os montantes exactos envolvidos dependeriam: da tonelagem de referência incluída no APPS/Protocolo; do preço acordado para as capturas; da utilização efectiva do APPS/Protocolo; e das contribuições relativas a serem feitas por a) a UE e b) os armadores da UE. O pessoal existente tanto nas instituições da UE como nas instituições angolanas seria capaz de fornecer o tempo necessario à negociação/monitorização do APPS/Protocolo.

25. **O planeamento, a futura monitorização e a avaliação da implementação da opção preferida devem-se basear num quadro lógico para a intervenção, com indicadores associados, e meios de verificação**, que poderiam ser utilizados para monitorizar a implementação e como parte de qualquer avaliação ex-post. A UE e Angola deveriam acordar conjuntamente numa

matriz de apoio setorial e assegurar um acompanhamento/avaliação contínuo através de um diálogo técnico entre as autoridades do país e a Delegação da UE em Angola, com uma reunião da Comissão Mista pelo menos uma vez por ano para avaliar o sucesso na implementação da matriz de apoio setorial, e uma reunião regular da Comissão Científica Mista para analisar informações sobre o estado das unidades populacionais e apresentar recomendações de gestão. É importante que os intervenientes relevantes (incluindo a sociedade civil) estejam envolvidos em todas as fases de planeamento e implementação do APPS/Protocolo.

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# RESUMEN

## Introducción, metodología y alcance de la evaluación

1. **El primer acuerdo de pesca entre la Comunidad Europea y Angola se firmó en 1989 y fue denunciado en 2006 por la UE, debido al marco legislativo adoptado en Angola en 2004.** Los buques de la UE que faenan actualmente en la zona económica exclusiva (ZEE) angoleña lo hacen sobre la base de autorizaciones directas. Desde 2019, Angola ha mostrado interés en un acuerdo de colaboración de pesca sostenible (ACPS), y tanto la UE como Angola han acordado iniciar conversaciones exploratorias sobre él.
2. **Esta evaluación ex ante se llevó a cabo de conformidad con el Reglamento Financiero de la UE y sus Normas de Aplicación, así como con las directrices y herramientas de la Comisión Europea para la mejora de la legislación**. Se consultó a un amplio abanico de partes interesadas tanto en la UE como en Angola, en el primer caso mediante cuestionarios con respuestas enviadas por correo electrónico, y en el segundo mediante una misión sobre el terreno en Angola. También se examinó un gran número de datos secundarios pertinentes.

## Contexto general de Angola y su sector pesquero

3. **Angola está situada en el sur de África y tiene una población de unos 35 millones de habitantes. Se enfrenta a importantes retos de desarrollo económico y social**. La guerra civil terminó hace dos décadas pero, a pesar del rápido crecimiento económico del país tras la guerra, basado en la producción de petróleo (el petróleo representa el 95 % de las exportaciones de Angola), un alto porcentaje de angoleños vive por debajo del umbral de pobreza y hay mucho desempleo. Angola se enfrenta además a la peor sequía de los últimos 38 años. Tras la pandemia del COVID-19, la economía ha experimentado una modesta recuperación y las perspectivas económicas son positivas.
4. **Tiene un litoral de 1 650 km y una zona económica exclusiva (ZEE) de 332 000 km$^2$.** La zona costera se caracteriza por una elevada productividad biológica, las masas de agua interiores son numerosas y la pesca es un sector importante para el país.
5. **Tras una serie de cambios estructurales durante las pasadas legislaturas, el sector pesquero vuelve a depender de un ministerio de dedicación plena, el Ministerio de Pesca y Recursos Marinos (MINPERMAR), debido al renovado interés del Gobierno por desarrollar este sector.** La Ley de Pesca y la legislación conexa están anticuadas y necesitan una revisión. La explotación de los recursos pesqueros se gestiona anualmente mediante medidas de gestión que especifican medidas de control de los insumos (número máximo de autorizaciones de buques), medidas de control de los productos (totales admisibles de capturas [TAC] y cuotas) y medidas técnicas (por ejemplo, tamaño mínimo de malla, vedas temporales y zonas de veda).
6. **El sistema de seguimiento, control y vigilancia se centra en cuatro áreas principales: i) inspección de los desembarques, ii) inspectores a bordo de buques de pesca industrial (PI) y de pesca semi-industrial (PSI), iii) control del movimiento de buques de eslora total (ET) superior a 15 m por satélite (sistema MONICAP) y iv) vigilancia en el mar con buques de inspección especializados,** bajo la responsabilidad del Servicio Nacional de Inspección de Pesca y Acuicultura (SNFPA). El SNFPA está equipado con 3 patrulleras (una de 30 m de eslora y dos de 19 m) y lanchas costeras, y opera en colaboración con otros dos buques de la Armada. Con una capacidad limitada (sólo cuenta con 28 observadores de pesca), durante las inspecciones da prioridad

a las pesquerías más problemáticas/vulnerables, es decir, las especies de pequeños pelágicos y remesarles y los buques que las pescan. Los principales riesgos detectados por el SNFPA en materia de pesca ilegal, no declarada y no reglamentada (INDNR) son: pesca por encima de las cuotas autorizadas (buques industriales y buques INDNR que transbordan pescado a buques de pesca artesanal); incumplimiento de las tallas mínimas de captura de las especies y del tamaño de malla; número muy limitado de "cajas azules" funcionales, es decir, sistemas de seguimiento de buques, a bordo de las flotas PI y PSI (28 funcionales para unos 260 buques); y dificultad de seguimiento de la pesca artesanal (ya que está dispersa a lo largo de 1 650 km de costa).

7. **El Instituto Nacional de Investigación Pesquera (INIP) se encarga de la investigación pesquera. No se dispone de información reciente y fiable sobre el estado de las poblaciones de peces que se encuentran en la zona de pesca angoleña, pero la situación de las poblaciones parece diversa**. En general, hay poca preocupación por el atún altamente migratorio y las especies afines (para los que la información es sólida) y los cefalópodos (que están moderadamente explotados), pero muchas poblaciones de peces demersales y camarones, así como poblaciones de pequeños pelágicos, están plenamente explotadas o sobreexplotadas, y/o la información para evaluar con certeza el estado de las poblaciones es limitada.

8. **La pesca se divide administrativamente en cuatro grandes segmentos, según el tamaño y las características técnicas de los buques:** pesca industrial, semi-industrial, artesanal y de subsistencia. Hay pesca marítima y continental, así como acuicultura.

9. **La flota artesanal y de subsistencia** están compuestas en su mayoría por embarcaciones de madera, con o sin motor, distribuidas entre unas 190 comunidades pesqueras artesanales y de subsistencia, con un número estimado de 7 900 embarcaciones de pesca marítima artesanal (con 30 000 pescadores y 16 900 mujeres transformadoras de pescado), que faenan principalmente con redes de cerco, redes de enmalle, palangres, líneas de mano y trampas para peces, con una producción media anual de 100 000 a 235 000 toneladas; y 9.600 buques dedicados a la pesca interior (40.000 pescadores y 9.000 mujeres transformadoras), con una producción anual de 10.000 a 30.000 toneladas.

10. **La flota semi-industrial** utiliza buques con casco de madera, fibra de vidrio o acero, con una eslora total ( ET) de hasta 24 m y una potencia motriz de hasta 850 caballos. Algunos tienen capacidad de congelación a bordo. La mayoría de estos buques utilizan redes de cerco y pescan pequeños pelágicos, y algunos están asociados a empresas pesqueras con instalaciones en tierra y embarcaderos privados. Hay unos 100 buques, que capturan entre 30.000 y 55.000 toneladas al año.

11. **La flota pesquera industrial está formada** por buques de casco de acero con una ET superior a 20 m y un motor de más de 240 caballos. Utilizan métodos de pesca tecnológicamente avanzados, dominados por el arrastre (de fondo y pelágico) y la red de cerco. La mayoría de estos buques están equipados con equipos de congelación. Transbordan las capturas en la bahía de Luanda (en el caso de los arrastreros camaroneros) o desembarcan las capturas en los principales puertos (Luanda, Lobito y Moçâmedes). Los cerqueros desembarcan el pescado directamente en los muelles de las empresas de transformación de pescado a las que están asociados (sobre todo en Baía Farta/Benguela y Tômbua/Namibe). Hay unos 160 buques que capturan entre 200 000 y 280 000 toneladas al año.

12. **En cuanto a la pesca marina**, los pequeños pelágicos representan alrededor del 75 % del volumen total de producción (sardinelas 39,6 % y jurel 19,3 %), los peces demersales 24 %, los crustáceos 1,1 % y los moluscos 0,5 %. En términos

de valor (en primera venta), los pelágicos representan el 67 %, los demersales el 29 %, los crustáceos el 3 % y los moluscos el 1 %.

13. **La industria de transformación cuenta con fábricas de transformación y transformación artesanal**. En los últimos 15 años se ha producido un importante desarrollo de unidades de la industria de transformación de pescado (normalmente congelación de pequeños pelágicos), principalmente en Luanda, Baía Farta y Tômbua. Algunas empresas, con el objetivo de exportar a la UE, han invertido recientemente en proyectos "punteros", como las empresas Octosea en Baía Farta y Sicopal en Moçâmedes. El pescado salado y seco, producido por un gran número de pequeños transformadores (generalmente mujeres), es consumido tradicionalmente por la población nacional y exportado a los países vecinos. La producción de pescado seco alcanzó una media de 28 000 toneladas anuales en el periodo 2018 - 2021. Los pequeños pelágicos congelados producidos por las fábricas son vendidos por mayoristas en los mercados nacionales y exportados regionalmente.
14. **El comercio de pescado desde y hacia Angola es importante.** Debido a los hábitos de consumo de pescado de la población angoleña, y a pesar de la elevada producción nacional, hay importantes importaciones de pescado y productos pesqueros. La mayor parte de estas importaciones son pequeños pelágicos congelados (33 000 toneladas importadas en 2018 y 13 000 toneladas en 2019, principalmente de Mauritania), estando limitadas las cantidades de jurel importado por Decreto presidencial anual. De 2018 a 2021, se importó una media anual de unas 8 000 toneladas de otros productos pesqueros. En cuanto a las exportaciones, durante el período 2018-2021, los crustáceos representaron el 64 % del valor total (con unas 3 000 toneladas anuales, exportadas principalmente a España), seguidos de pescado (31 %), moluscos (solo el 2 %) y otros (3 %). Las importaciones de productos de la pesca procedentes de la UE representan una media de unas 1 900 toneladas anuales, con un valor de 22 millones de euros, y las exportaciones a la UE, una media de unas 2 800 toneladas anuales, con un valor de 14 millones de euros.
15. **El sector de la acuicultura** es prioritario para el Gobierno y ofrece potencial de crecimiento y desarrollo. La acuicultura continental comprende la producción de subsistencia y comercial. Ya funcionan varias unidades de acuicultura comercial continental, centradas casi exclusivamente en la producción de tilapia mediante procesos intensivos, con semillas mejoradas y el uso de piensos formulados (hay varias empresas privadas locales que producen piensos). La mayoría de estas unidades cuentan con sus propias instalaciones de producción de alevines mejorados. Existen dos centros de larvicultura de tilapia (para la producción de juveniles) y dos estaciones de acuicultura experimental (con fines de formación y extensión). La acuicultura marina es prácticamente inexistente; recientemente se ha construido un centro de larvicultura costera cerca de Luanda. La producción acuícola entre 2018 y 2021 alcanzó una media de 2 000 toneladas anuales.

**Resultados de la evaluación ex ante**

16. **Las necesidades compartidas por la UE y Angola se refieren principalmente a la explotación sostenible de los recursos marinos y a la lucha contra la pesca INDNR**, tal como exigen la política y la legislación de ambas partes y las organizaciones regionales de pesca de las que son miembros. Garantizar la sostenibilidad requeriría que el ACPS/Protocolo se dirigiera a los "recursos excedentarios". Otras necesidades compartidas incluyen la necesidad de que un posible ACPS/Protocolo se celebre con un espíritu de cooperación justa, transparente y equitativa y que tenga como objetivo el reparto equitativo de los beneficios entre las dos partes. Otra necesidad compartida es que un

ACPS/Protocolo contribuya a la creación de empleo y al desarrollo económico en coherencia con otras intervenciones de la UE.

17. **Las necesidades de Angola relacionadas con el "componente de acceso" de cualquier ACPS/Protocolo son generar ingresos** del sector pesquero y que los buques de la UE cumplan la legislación nacional incluyendo el embarque de tripulación y observadores nacionales. En **cuanto al componente de apoyo sectorial, Angola ha expresado como necesidades prioritarias el aumento de las exportaciones a la UE, el desarrollo de la maricultura y el desarrollo de las flotas nacionales.** Será importante garantizar que no haya duplicación, sino sinergia, con las actividades y proyectos de otros donantes.

18. **Las necesidades de los armadores de atuneros y de pesca demersal de la UE derivadas de un ACPS/Protocolo consisten en un acceso seguro y plurianual a la zona de pesca angoleña para respaldar una red de oportunidades de pesca regionales** que permita a la flota adaptar su estrategia pesquera a las capturas disponibles en la región (en el caso de la flota atunera) y garantizar su presencia actual (en el caso de las flotas de camarones de aguas profundas y de pesca demersal). Las necesidades de oportunidades de pesca de atún de los operadores de la UE se estiman en 20-25 oportunidades de pesca con cerco y un tonelaje de referencia indicativo de unas 5 000 - 7 000 toneladas anuales, teniendo en cuenta que las capturas existentes pueden fluctuar considerablemente de un año a otro. Las necesidades de otros tipos de buques de la UE incluirían muy probablemente oportunidades de pesca para las flotas que faenan actualmente en Angola con autorizaciones directas (es decir, unos 11 arrastreros camaroneros de aguas profundas y 3 arrastreros de peces demersales) y "recién llegados", que comprenden arrastreros de cefalópodos de la UE, así como atuneros palangreros de superficie. Otras necesidades expresadas por el sector privado de la UE son para los arrastreros de pequeños pelágicos, pero el acceso de estos buques no se ajustaría a los requisitos de sostenibilidad ni al principio de recursos excedentarios. Todos los buques necesitarían poder desembarcar el producto en los puertos de su elección en función de los precios y servicios ofrecidos por los distintos puertos (pero se les podría incentivar para que desembarcaran el producto en Angola, por ejemplo mediante mejoras portuarias y/o tarifas de acceso reducidas para las capturas desembarcadas en Angola).

19. **El valor añadido de la participación de la UE en un ACPS/Protocolo provendría de las contribuciones financieras para el apoyo sectorial** que estarían disponibles para financiar actividades no respaldadas por otros donantes o proporcionadas de otro modo por la UE, o que los presupuestos actuales del sector pesquero no son suficientes para abordar. El valor añadido también se derivaría del diálogo político sectorial en coherencia con el apoyo prestado en el marco de otros ACPS de la región. La participación de la UE también aportaría valor añadido al proporcionar el control a nivel comunitario de las actividades de los buques pesqueros de la UE en la zona de pesca angoleña. Otro valor añadido sería la contribución al refuerzo del papel de la UE en la región: el papel de la UE en la Comisión Internacional para la Conservación del Atún del Atlántico (CICAA) y, potencialmente, en el Comité de Pesca para el Atlántico Centro-Oriental (CPACO) y en la Conferencia Ministerial sobre cooperación pesquera entre los Estados africanos ribereños del Océano Atlántico (ATLAFCO) se vería reforzado si representara a los buques de la UE que faenan en aguas angoleñas en virtud de un ACPS/Protocolo.

20. **Las lecciones aprendidas del pasado incluyen:** i) en algunos casos, la no plena utilización de las oportunidades de pesca y del tonelaje de referencia previsto en diferentes ACPS; ii) los riesgos de que los departamentos de pesca gubernamentales no puedan absorber y utilizar plenamente la financiación de apoyo sectorial; iii) las ventajas de contar con Protocolos plurianuales de 5-6 años

que proporcionen una mayor certidumbre a ambas partes; y iv) los importantes beneficios económicos y sociales tanto para la UE como para terceros países que pueden derivarse de los ACPS /Protocolos.

21. **Los objetivos de un ACPS/protocolo se derivan de múltiples fuentes**: de las necesidades de ambas partes, los requisitos de la Política Pesquera Común (PPC) (artículo 31), el Reglamento (CE) nº 1005/2008 del Consejo (el "Reglamento INDNR"), UNCLOS/CNUDM (artículo 62), y el Objetivo de Desarrollo Sostenible 14 de las Naciones Unidas. Los objetivos generales (apoyados por una serie de objetivos específicos) se definen como: i) la conservación de los recursos y la sostenibilidad ambiental garantizadas mediante la explotación racional y sostenible de los recursos marinos vivos de Angola; ii) la protección proporcionada a la viabilidad financiera de la flota pesquera de la UE que opera en el Océano Atlántico Oriental, y al empleo vinculado a las actividades de la flota tanto en la UE como en Angola; y iii) un sector pesquero sostenible desarrollado en Angola, y Angola integrada en la economía mundial.

22. **Esta evaluación considera tres opciones políticas**. La opción 1 es "Sin ACPS /Protocolo". Con esta opción, se mantendría la situación actual (es decir, los cerqueros atuneros, los camaroneros de altura y los arrastreros de peces demersales que faenan en aguas angoleñas con autorizaciones directas seguirían haciéndolo). La opción 2 considera "un ACPS/protocolo únicamente para el atún" y ofrecería oportunidades de pesca para el atún y especies afines (es decir, los actuales cerqueros atuneros, más los palangreros de superficie para el atún como "recién llegados"). La opción 3 es un " ACPS/protocolo de especies mixtas" con acceso para los buques de pesca de peces demersales, camarones y cefalópodos, así como para los atuneros, pero no para las especies de pequeños pelágicos, dada la preocupación por la situación de las poblaciones de estas especies.

23. **La opción 3, un "ACPS/Protocolo de especies mixtas", es la preferida**. Requeriría la actualización de la legislación angoleña (en particular, la Ley de Pesca de 2004 y sus reglamentos). Apoyaría la explotación sostenible de los recursos y sería coherente con ella, siempre que: i) la situación de las poblaciones sea objeto de un seguimiento adecuado y muestre mejoras; y ii) en el caso de las poblaciones plenamente explotadas, la concesión de autorizaciones a buques adicionales de la UE no incremente el número total de buques extranjeros que pescan esas poblaciones. La opción 3 sería eficaz para alcanzar los objetivos, pertinente para las necesidades, coherente con la política pesquera y de cooperación de la UE y aceptable para las partes interesadas. Su eficacia dependería del contenido detallado del Protocolo negociado y debería evaluarse ex post. Representaría una situación ventajosa para la UE y Angola a la hora de abordar las necesidades identificadas de las distintas partes interesadas.

24. **El volumen de pagos, recursos humanos y otros gastos administrativos de la UE vendría determinado por los niveles de contribución financiera que la UE debe pagar a Angola en concepto de acceso y apoyo sectorial**. Los importes exactos dependerían de: el tonelaje de referencia incluido en el ACPS/Protocolo; el precio acordado para las capturas; la utilización real del ACPS/Protocolo; y las contribuciones relativas que deben hacer a) la UE y b) los armadores de la UE. El personal existente en las instituciones tanto de la UE como de Angola podría ocuparse del tiempo necesario para negociar y supervisar el ACPS/protocolo.

25. **La planificación y el futuro seguimiento y evaluación de la ejecución de la opción preferida deberían basarse en un marco lógico para la intervención con indicadores asociados y medios de verificación**, que podrían utilizarse para supervisar la ejecución y en cualquier evaluación ex post. La UE y Angola deberían acordar conjuntamente una matriz de apoyo sectorial y

garantizar un seguimiento/evaluación continuos a través de un diálogo técnico entre las autoridades del país y la Delegación de la UE en Angola, con un Comité Conjunto que se reúna al menos una vez al año para evaluar el éxito en la aplicación de la matriz de apoyo sectorial, y un Comité Científico Conjunto que se reúna periódicamente para analizar la información sobre el estado de las poblaciones y formular recomendaciones de gestión. Es importante que las partes interesadas (incluida la sociedad civil) participen en todas las fases de planificación y aplicación del ACPS/Protocolo.

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# RÉSUMÉ


## Introduction, méthodologie et portée de l'évaluation

1. **Le premier accord de pêche entre la Communauté européenne et l'Angola a été signé en 1989 et dénoncé en 2006 par l'UE, en raison du cadre législatif adopté en Angola en 2004.** Les navires de l'UE qui pêchent actuellement dans la zone économique exclusive (ZEE) angolaise le font sur la base d'autorisations directes. Depuis 2019, l'Angola a manifesté son intérêt pour un accord de partenariat dans le domaine de la pêche durable (APPD), et l'UE et l'Angola ont convenu d'entamer des discussions exploratoires à ce sujet.
2. **Cette évaluation ex-ante a été réalisée conformément au règlement financier de l'UE et à ses modalités d'application, ainsi qu'aux lignes directrices et à la "boîte à outils" de la Commission européenne relatives à l'amélioration de la réglementation**. Un large éventail de parties prenantes, tant dans l'UE qu'en Angola, ont été consultées, les premières essentiellement à l'aide de questionnaires dont les réponses ont été envoyées par courrier électronique, et les secondes par le biais d'une mission sur le terrain en Angola. Un grand nombre de données secondaires pertinentes ont également été examinées.

## Contexte général de l'Angola et de son secteur de la pêche

3. **L'Angola est situé en Afrique australe et compte une population d'environ 35 millions d'habitants. Il est confronté à d'importants défis en matière de développement économique et social**. La guerre civile a pris fin il y a deux décennies et malgré la croissance économique rapide du pays après la guerre, basée sur la production de pétrole (le pétrole représente 95 % des exportations de l'Angola), un pourcentage élevé d'Angolais vit en dessous du seuil de pauvreté et le chômage est très répandu. L'Angola est également confronté à la pire sécheresse de ces 38 dernières années. Après la pandémie de COVID-19, l'économie a connu une modeste reprise et les perspectives économiques sont positives.
4. **Il possède un littoral de 1 650 km et une ZEE de 332 000 km$^2$.** La zone côtière se caractérise par une productivité biologique élevée, les plans d'eau intérieurs sont nombreux et la pêche est un secteur important pour le pays.
5. **Après une série de changements structurels au cours des législatures précédentes, le secteur de la pêche est de nouveau placé sous l'autorité d'un ministère de la pêche et des ressources marines à part entière (MINPERMAR), en raison de l'intérêt renouvelé du gouvernement pour le développement de ce secteur.** La Loi des pêches de 2004 et la législation connexe sont obsolètes et doivent être révisées. L'exploitation des ressources halieutiques est gérée sur une base annuelle par des mesures de gestion qui spécifient des mesures de contrôle des intrants (nombre maximum d'autorisations de navires), des mesures de contrôle des extrants (totaux admissibles des captures – TAC - et quotas) et des mesures techniques (par exemple, maillages minimaux, saisons et zones de fermeture).
6. **Le système de suivi, de contrôle et de surveillance se concentre sur quatre domaines principaux :** i) l'inspection des débarquements, ii) les inspecteurs à bord des navires de pêche industrielle (PI) et des navires de pêche semi-industrielle (PSI), iii) le contrôle par satellite (système MONICAP) du mouvement des navires dont la longueur hors tout (LOA) est supérieure à 15 m et iv) la surveillance en mer avec des navires d'inspection dédiés, sous la responsabilité du Service national d'inspection de la pêche et de l'aquaculture ( SNFPA ). Le SNFPA est équipé de 3 patrouilleurs (un de 30 m et deux de 19 m) et

d'embarcations côtières, et opère en collaboration avec deux autres navires de la marine. Avec des capacités limitées (elle ne dispose que de 28 observateurs de pêche), elle donne la priorité, lors des inspections, aux pêcheries les plus problématiques/vulnérables, à savoir les espèces de petits pélagiques et de démersaux, ainsi que les navires qui les pêchent. Les risques majeurs identifiés par le SNFPA en termes de pêche INN sont : la pêche au-delà des quotas autorisés (navires industriels et navires INN transbordant du poisson sur des navires de pêche artisanale) ; le non-respect des espèces et des maillages minimaux ; le nombre très limité de "boîtes bleues" (système VMS) fonctionnelles, à bord des flottes de PI et PSI (28 fonctionnelles pour environ 260 navires) ; et la difficulté de contrôler la pêche artisanale (étant donné qu'elle est dispersée sur 1 650 km de littoral).

7. **L'Institut national de recherche sur la pêche (INIP) est chargé de la recherche halieutique. Des informations récentes et fiables sur l'état des stocks de poissons présents dans la zone de pêche angolaise ne sont pas largement disponibles, mais il semble que l'état des stocks soit mitigé**. En général, les thons grands migrateurs et les espèces apparentées (pour lesquels les informations sont solides) et les céphalopodes (qui sont modérément exploités) suscitent peu d'inquiétude, mais de nombreux stocks de poissons démersaux et de crevettes, ainsi que de petits pélagiques, sont pleinement exploités ou surexploités, et/ou les informations permettant d'évaluer avec certitude l'état des stocks sont limitées.

8. **La pêche est administrativement divisée en quatre segments, en fonction de la taille et des caractéristiques techniques des navires** : la pêche industrielle, semi-industrielle, artisanale et de subsistance. Il existe une pêche maritime et continentale, ainsi que de l'aquaculture et de la pisciculture.

9. **La flotte artisanale et de subsistance est composée** principalement de bateaux en bois, avec ou sans moteur, répartis entre environ 190 communautés de pêche artisanale et de subsistance, avec environ 7 900 bateaux de pêche maritime artisanale (avec 30 000 pêcheurs et 16 900 femmes transformatrices), pêchant principalement avec des sennes coulissantes, des filets maillants, des palangres, des lignes à main et des pièges à poissons, avec une production moyenne de 100 000 à 235 000 tonnes par an ; et 9 600 navires pratiquant la pêche continentale (40 000 pêcheurs et 9 000 femmes transformatrices), avec une production de 10 000 à 30 000 tonnes par an.

10. **La flotte semi-industrielle** est composée des navires à coque en bois, en fibre de verre ou en acier, d'une longueur hors tout (LHT) allant jusqu'à 24 m et d'une puissance motrice allant jusqu'à 850 chevaux. Certains ont une capacité de congélation à bord. La plupart de ces navires utilisent des sennes coulissantes et ciblent les petits pélagiques, et certains sont associés à des sociétés de pêche disposant d'installations à terre et de jetées privées. Il y a environ 100 navires, capturant entre 30 000 et 55 000 tonnes par an.

11. **La flotte de pêche industrielle est composée** de navires à coque en acier d'une longueur hors tout supérieure à 20 m et d'un moteur d'une puissance supérieure à 240 chevaux. Ils utilisent des méthodes de pêche technologiquement avancées, dominées par le chalutage (de fond et pélagique) et la senne coulissante. La plupart de ces navires sont congélateurs. Ils transbordent leurs captures dans la baie de Luanda (dans le cas des chalutiers crevettiers) ou débarquent les captures dans les principaux ports du pays (Luanda, Lobito et Moçâmedes). Les senneurs débarquent le poisson directement sur les jetées des entreprises de transformation du poisson auxquelles ils sont associés (notamment à Baía Farta/Benguela et Tômbua/Namibe). Il y a environ 160 navires qui capturent entre 200 000 et 280 000 tonnes par an.

12. **En ce qui concerne la pêche maritime**, les petits pélagiques représentent environ 75 % des quantités totales (sardinelles 39,6 % et chinchard 19,3 %), les poissons démersaux 24 %, les crustacés 1,1 % et les mollusques 0,5 %. En termes de valeur (à la première vente), les pélagiques représentent 67 %, les démersaux 29 %, les crustacés 3 % et les mollusques 1 %.

13. **L'industrie de transformation comprend les usines de transformation et la transformation artisanale**. Au cours des 15 dernières années, il y a eu un développement significatif des unités de transformation du poisson (généralement la congélation des petits pélagiques), principalement à Luanda, Baía Farta et Tômbua. Certaines entreprises, qui visent à exporter vers l'UE, ont récemment investi dans des projets de pointe, notamment les entreprises Octosea à Baía Farta et Sicopal à Moçâmedes. Le poisson salé et séché, produit par un grand nombre de petits transformateurs (généralement des femmes), est traditionnellement consommé par la population nationale et exporté vers les pays voisins. La production de poisson séché s'élève en moyenne à 28 000 tonnes par an pour la période 2018 - 2021. Les petits pélagiques congelés produits par les usines sont vendus par des grossistes sur les marchés nationaux et exportés au niveau régional.

14. **Le commerce du poisson de/vers l'Angola est important.** En raison des habitudes de consommation de poisson de la population angolaise, et malgré la forte production nationale, les importations de poissons et de produits de la pêche sont importantes. La plupart de ces importations sont des petits pélagiques congelés (33 000 tonnes importées en 2018 et 13 000 tonnes en 2019, principalement de Mauritanie), les quantités de chinchard importées étant limitées par un décret présidentiel annuel. De 2018 à 2021, une moyenne annuelle d'environ 8 000 tonnes d'autres produits de la pêche a été importée. En termes d'exportations, au cours de la période 2018-2021, les crustacés représentent 64 % en valeur (avec environ 3 000 tonnes par an, principalement exportées vers l'Espagne), suivis par les poissons (31 %) et les mollusques (seulement 2 %) et autres (3 %). Les importations de produits de la pêche en provenance de l'UE représentent en moyenne environ 1 900 tonnes par an pour une valeur de 22 millions d'euros, et les exportations vers l'UE environ 2 800 tonnes par an pour une valeur de 14 millions d'euros.

15. **Le secteur de l'aquaculture/pisciculture** est une priorité pour le gouvernement et offre un potentiel de croissance et de développement. La pisciculture comprend la production de subsistance et la production commerciale. Plusieurs unités de pisciculture commerciale sont déjà en activité et se concentrent presque exclusivement sur la production de tilapia par des procédés intensifs, avec des stocks génétiques améliorés et l'utilisation d'aliments formulés (il existe plusieurs entreprises privées locales qui produisent des aliments formulés). La plupart de ces unités disposent de leur propre installation de production d'alevins améliorés. Il existe deux centres de larviculture du tilapia (pour la production de juvéniles) et deux stations de pisciculture expérimentale (à des fins de formation et de vulgarisation). L'aquaculture marine est pratiquement inexistante ; un centre côtier de larviculture a été récemment construit près de Luanda. La production aquacole entre 2018 et 2021 est en moyenne de 2 000 tonnes par an.

**Résultats de l'évaluation ex ante**

16. **Les besoins communs de l'UE et de l'Angola concernent principalement l'exploitation durable des ressources marines et la lutte contre la pêche INN**, comme l'exigent la politique et la législation des deux parties, ainsi que les organisations régionales de pêche dont elles sont membres. Pour garantir la durabilité, il faudrait que l'APPS/le Protocole soit axé sur les "ressources excédentaires". Parmi les autres besoins communs figure la nécessité de conclure un éventuel APPS/protocole dans un esprit de coopération juste, transparente et équitable et de répartir équitablement les bénéfices entre les deux parties. Un autre besoin partagé est qu'un APPS/Protocole contribue à la création d'emplois et au développement économique en cohérence avec d'autres interventions de l'UE.

17. **Les besoins de l'Angola en ce qui concerne le "volet accès" de tout APPS/Protocole sont de générer des revenus** à partir du secteur de la pêche et de permettre aux navires de l'UE de se conformer à la législation nationale, y compris l'embarquement d'équipages et d'observateurs nationaux. **En ce qui concerne le volet "appui sectoriel", l'Angola a indiqué que ses besoins prioritaires étaient l'augmentation des exportations vers l'UE, le développement de l'aquaculture et le développement des flottes nationales.** Il sera important de veiller à ce qu'il n'y ait pas double emploi, mais plutôt synergie, avec les activités et les projets d'autres bailleurs de fonds.

18. **Les besoins des thoniers et des armateurs de pêche démersale de l'UE dans le cadre d'un APPS/Protocole concernent l'accès à la zone de pêche angolaise, sur une base pluriannuelle sécurisée, afin de soutenir un réseau de opportunités de pêche régionales**, permettant ainsi à la flotte d'adapter sa stratégie de pêche aux captures disponibles dans la région (dans le cas de la flotte thonière) et de maintenir sa présence actuelle (dans le cas des flottes de pêche à la crevette d'eau profonde et aux poissons démersaux). Les besoins des opérateurs de l'UE en matière de opportunités de pêche au thon sont estimés à 20-25 opportunités de pêche à la senne et à un tonnage de référence indicatif d'environ 5 000 à 7 000 tonnes par an, sachant que les captures existantes peuvent fluctuer considérablement d'une année à l'autre. Les besoins des autres types de navires de l'UE comprendraient très probablement des opportunités de pêche pour les flottes qui pêchent actuellement en Angola en vertu d'autorisations directes (c'est-à-dire environ 11 chalutiers crevettiers et 3 chalutiers de pêche démersale) et de "nouveaux venus", comprenant des chalutiers céphalopodiers de l'UE ainsi que des palangriers thoniers de surface. D'autres besoins exprimés par le secteur privé de l'UE concernent les chalutiers spécialisés dans les petits pélagiques, mais l'accès de ces navires ne serait pas conforme aux exigences de durabilité et au principe des ressources excédentaires. Tous les navires devraient pouvoir débarquer leurs produits dans les ports de leur choix en fonction des prix et des services fournis par les différents ports (mais ils pourraient être incités à débarquer leurs produits en Angola, par exemple grâce à l'amélioration des conditions portuaires et/ou en réduisant les droits d'accès pour les captures débarquées en Angola).

19. **La valeur ajoutée de la participation de l'UE à un APPS/Protocole résulterait de la contribution financière de l'appui sectoriel** qui serait disponible pour financer des activités qui ne sont pas appuyées par d'autres bailleurs de fonds ou par l'UE dans le cadre d'autres interventions, ou pour lesquelles les budgets actuels du secteur de la pêche ne sont pas suffisants. La valeur ajoutée proviendrait également du dialogue politique sectoriel en cohérence avec le soutien apporté dans le cadre d'autres APPS dans la région. La participation de l'UE apporterait également une valeur ajoutée en améliorant le contrôle au niveau de l'UE des activités des navires de pêche de l'UE dans la zone de pêche angolaise. Une autre valeur ajoutée serait la contribution au

renforcement du rôle de l'UE dans la région - le rôle de l'UE au sein de la CICTA, et potentiellement du Comité des pêches pour l'Atlantique Centre-Est (COPACE) et de la Conférence ministérielle sur la coopération en matière de pêche entre les États africains riverains de l'océan Atlantique (COMHAFAT) serait renforcé si celle-ci représentait les navires de l'UE pêchant dans les eaux angolaises dans le cadre d'un APPS/Protocole.

20. **Les leçons tirées du passé comprennent :** i) dans certains cas, l'utilisation incomplète des opportunités de pêche et du tonnage de référence prévus dans les différents APPF ; ii) les risques que les directions des pêches des gouvernements ne soient pas en mesure d'absorber et d'utiliser pleinement le budget de l'appui sectoriel ; iii) les avantages des protocoles pluriannuels de 5-6 ans qui offrent une plus grande certitude aux deux parties ; et iv) les avantages économiques et sociaux significatifs pour l'UE et les pays tiers qui peuvent résulter des APPF/protocoles.

21. **Les objectifs d'un APPS/Protocole proviennent de sources multiples** - des besoins des deux parties, des exigences de la politique commune de la pêche (PCP) (article 31), du règlement (CE) n° 1005/2008 du Conseil (le "règlement INN"), UNCLOS/CNDUM (article 62), et de l'objectif de développement durable n° 14 des Nations unies. Les objectifs généraux (soutenus par un certain nombre d'objectifs spécifiques) sont définis comme suit : i) conservation des ressources et durabilité environnementale assurées par une exploitation rationnelle et durable des ressources marines vivantes de l'Angola ; ii) protection assurée pour la viabilité financière de la flotte de pêche de l'UE opérant dans l'océan Atlantique oriental, et pour l'emploi lié aux activités de la flotte tant dans l'UE qu'en Angola ; et iii) secteur de la pêche durable développé en Angola, et intégration de l'Angola dans l'économie mondiale.

22. **Cette évaluation présente trois options stratégiques**. L'option 1 est "Pas d'APPS/Protocole". Dans le cadre de cette option, la situation actuelle serait maintenue (c'est-à-dire que les senneurs thoniers, les crevettiers et les chalutiers de pêche démersale opérant dans les eaux angolaises en vertu d'autorisations directes continueraient à le faire). L'option 2 envisage "un APPS/Protocole concernant uniquement le thon" et offrirait des opportunités de pêche pour le thon et les espèces apparentées (c'est-à-dire les thoniers senneurs actuels, ainsi que des palangriers thoniers de surface en tant que "nouveaux venus"). L'option 3 est une "APPS/Protocole pour des espèces mixtes", avec un accès pour des chalutiers de pêche démersale, crevettiers et céphalopodiers, ainsi que pour les thoniers, mais pas pour les petits pélagiques, compte tenu des inquiétudes concernant l'état des stocks de poissons.

23. **L'option 3, une "APPS/Protocole pour des espèces mixtes", est l'option privilégiée**. Elle nécessiterait une mise à jour de la législation angolaise (en particulier de la Loi des pêches de 2004 et de ses règlements d'application). Elle soutiendrait et serait compatible avec une exploitation durable des ressources, à condition que : i) l'état des stocks fasse l'objet d'un suivi approprié et que des améliorations soient constatées ; et ii) pour les stocks pleinement exploités, les navires supplémentaires de l'UE qui obtiendraient des autorisations de pêche n'augmentent pas le nombre total de navires étrangers exploitant ces stocks. L'option 3 permettrait d'atteindre efficacement les objectifs, répondrait aux besoins, serait cohérente avec la politique de pêche et de coopération de l'UE et serait acceptable pour les parties prenantes. Son efficacité dépendrait du contenu détaillé du protocole négocié et devrait être évaluée ex-post. Il s'agirait d'une situation gagnant-gagnant pour l'UE et l'Angola, qui répondrait aux besoins identifiés des différentes parties prenantes.

24. **Le volume des paiements, des ressources humaines et des autres dépenses administratives de l'UE serait déterminé par les niveaux de la contribution financière à verser par l'UE à l'Angola pour l'accès et l'appui sectoriel**. Les montants exacts en jeu dépendront du tonnage de référence inclus dans l'APPS/Protocole, du prix convenu pour les captures, de l'utilisation effective de l'APPS/Protocole et des contributions relatives à apporter par a) l'UE et b) les armateurs de l'UE. Le personnel en place dans les institutions de l'UE et de l'Angola serait en mesure de se mobiliser le temps nécessaire à la négociation et au suivi de l'APPS/Protocole.

25. **La planification, le suivi et l'évaluation futurs de la mise en œuvre de l'option privilégiée devraient se faire sur la base d'un cadre logique pour l'intervention avec des indicateurs associés et des moyens de vérification**, qui pourraient être utilisés pour suivre la mise en œuvre et dans toute évaluation ex-post. L'UE et l'Angola devraient convenir ensemble d'une matrice de l'appui sectoriel et assurer un suivi/une évaluation continus par le biais d'un dialogue technique entre les autorités du pays et la délégation de l'UE en Angola, avec une Commission mixte se réunissant au moins une fois par an pour évaluer le succès de la mise en œuvre de la matrice de l'appui sectoriel, et une Commission scientifique mixte se réunissant régulièrement pour analyser les informations sur l'état des stocks et formuler des recommandations en matière de gestion. Il est important que les parties prenantes concernées (y compris la société civile) soient impliquées dans toutes les étapes de la planification et de la mise en œuvre de l'APPS/Protocole.

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# INTRODUCTION

The European Union (EU) currently has active Sustainable Fisheries Partnership Agreement (SFPA) Protocols with the following 'third countries' in the Eastern Atlantic Ocean: Cabo Verde, Côte d'Ivoire, Guinea Bissau, Mauritania, Morocco, São Tomé and Príncipe , the Gambia, Gabon, and Senegal. These SFPAs allow EU vessels to fish for surplus stocks in the third countries' Exclusive Economic Zones (EEZ). The SFPAs have multiple objectives, including supporting responsible fisheries, optimal use of EU fleet capacity, creation of employment and value addition both in the EU and in third countries, provision of product to the EU processing industry, and contribution to EU market supplies. The current agreements are complementary and strengthen the EU's strategy to create a network of fishing opportunities for EU fishing vessels in the East Atlantic Ocean.

The first fisheries agreement between the European Community and Angola was signed in 1989. The authorised species included tuna, demersal fish and crustaceans (shrimp), and small pelagics on an experimental basis. The agreement was denounced in 2006 by the EU, due to the legislative framework adopted in Angola in October 2004 stipulating that all fishing activities would have to be carried out in association with Angolan enterprises and the origin of fish would have to be Angolan (see Section 6.1).

EU vessels currently fishing in the Angolan EEZ operate under the regime of direct authorisations (and private agreements with Angolan nationals). Since 2019, Angola has been showing interest in a SFPA, as the development of the fisheries, blue economy and maritime sectors have become priorities for the government. As a result it formally requested the opening of negotiations with the EU. In the 4th Angola-EU Ministerial Meeting in March 2019, both Parties 'concurred in initiating exploratory discussions about the SFPA'. Angola has since then signaled that it intends to update its legislation. These updates could potentially accommodate any specific requirements of a SFPA. Additional discussion on the changes potentially necessary is provided later, but it could be important for necessary legislative updates to be adopted before any future SFPA was negotiated between the EU and Angola. Likewise, the EU fishing sector and EU Member States have expressed interest in a potential SFPA with Angola.

The Council Conclusions on the External Dimension of the Common Fisheries Policy (CFP) adopted on 19 March 2012 require an ex-post and ex-ante evaluation to be undertaken by the Commission before the signature of a SFPA. This requirement is enshrined in Article 31(10) of the CFP basic regulation[1].

Given the time span elapsed since the termination of the last agreement with Angola in 2006, an ex-post evaluation would have little value due to the difficulties of completing meaningful consultations with stakeholders involved with the agreement almost 20 years ago. The terms of reference for this assignment therefore only considered it appropriate to conduct an ex-ante evaluation to assess potential future arrangements. This evaluation provides the Commission with the data and technical, economic, and social analyses of the fisheries resources and related fishing and economic activities to assess and decide on future action. It evaluates the features of a SFPA and provides information potentially relevant to possible negotiations between the Commission on behalf of the EU and Angola. It also provides information on the EU cooperation with Angola on related policies, such as trade of fisheries and aquaculture products between the EU and Angola or the EU development and cooperation policies and interests in Angola related to fisheries, marine and maritime policies.

1 "The Commission shall arrange for independent ex-ante and ex-post evaluations of each protocol to a sustainable fisheries partnership agreement, and make them available to the European Parliament and to the Council in good time before it submits to the Council a recommendation to authorise the opening of negotiations for a successor protocol." – Regulation (EU) 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

The Commission is expected to use this evaluation study as a tool for improving the quality and coherence of the decision-making. The study will serve as basis for the Commission's evaluation report (Staff Working Document) on the subject.

Following this introduction, the sections of this report provide: a description of the methodology used during the evaluation; general background information on Angola; information on fisheries governance in the country; consideration of the status of stocks; a description of the domestic fishing sector; information about foreign fishing vessel activity in the country; the ex-ante evaluation of a possible SFPA and Protocol; and key findings and conclusions.

# 1 METHOD AND SCOPE OF THE EVALUATION

This evaluation was conducted over the period January to May 2023, in three main phases: a preparatory phase, in January 2023, to review background literature and prepare the methodology for the evaluation which was documented in an inception report; a data collection and analysis phase in February and March 2023, involving consultations in the EU and in Angola; and a reporting phase in March – May 2023. During this latter phase, data and analysis provided the basis for reliable and credible findings, from which are drawn evidence-based conclusions and recommendations.

During the data collection and analysis phase, consultations were completed with the following (a full list of consulted organisations in the EU and a short summary of their views are provided in Annex 3, and the organisations consulted in Angola are provided in Annex 4):

**In the EU:**

- European Commission services (e.g. DG MARE Unit B3, DG DEVCO and EEAS);
- Stakeholders potentially directly involved with a future SPFA/Protocol, i.e. private sector in France, Spain, Portugal, Greece, Italy (for tuna, crustaceans and demersal fishing); Ireland, the Netherlands, Germany, Poland, Latvia and Lithuania (for small pelagics fishing);
- Stakeholders that would be in charge of the follow-up and implementation of any future agreement, i.e. fisheries administrations in the Member States mentioned above; and
- Civil society organisations with a potential interest in SFPAs.

The private sector in the EU, Member States representatives, and civil society organisations were consulted using specific and different questionnaires.

**In Angola** (through a field mission):

- The EU Delegation (EUD) to the Republic of Angola;
- Government sector stakeholders;
- Private sector stakeholders in upstream, catching, and downstream processing sectors; and
- Other donors engaged with Angola

The data collection and analysis phase also involved the collection and review of much secondary information and many reports as shown in Annex 7. The most recent information available about the status of stocks was obtained from the International Commission for the Conservation of Atlantic Tunas (ICCAT) (on highly migratory species), from the Fishery Committee for the Eastern Central Atlantic (CECAF) for demersal stocks and small pelagic stocks, and from the National Fisheries Investigation Institute (INIP) in Angola. The Commission provided data on direct fishing authorisations and catches declared by the EU fleet in Angolan waters.

The evaluation was monitored and guided throughout by an Inter-service Steering Group (ISG) consisting of officials from Commission services and the EEAS. The evaluation was carried out in accordance with both the Financial Regulation and its Rules of Application which define the different aspects that an ex-ante evaluation needs to address, and the Commission's Better Regulation Guidelines and "Toolbox".

The ex-ante evaluation was guided by, and ensured that the evaluation responded to, a range of specific evaluation questions included in the terms of reference. 'Annex 6: Supporting data' provides information on where and how the evaluation questions are considered and answered in different sections of this report.

# 2 GENERAL BACKGROUND

## 2.1 Geography

A vast country (1 246 700 km$^2$) with a long coastline of 1 650 km along the southern Atlantic and a central plateau, Angola borders Namibia, Zambia, the Democratic Republic of the Congo and Congo (see Figure 1).

It has a population of more than 34.7 million[2], mostly living in the western half of the country; urban areas account for the highest concentrations of people, particularly the capital Luanda. It has a tropical climate which is semi-arid in the south and along the coast to Luanda; while the north has a cool, dry season (May to October) and a hot, rainy season (November to April).


**Figure 1: Map of the Republic of Angola**
Source: UN Geospatial (copyright United Nations)

[2] Source: BBC country profile

## 2.2 Political situation

The social and political situation in Angola has been relatively stable since the end of the civil war in 2002, but the country is facing a severe economic crisis and large inequalities. The current President João Lourenço has been in power since 2017, after a 38-year term by the former President dos Santos. Formerly aligned with the 'Eastern Bloc', Angola now relies heavily on foreign aid from the US and other western countries. Relations with China pre-date independence and now seem mostly trade related and based on the large Chinese community currently working in Angola (estimated at 22 000 in 2019).

## 2.3 Development and economic status

In 2020, Angola ranked as the 83rd economy in the world in terms of GDP, 66th in exports, 111th in imports, and 164th in terms of GDP per capita. Falling in the category of 'the richest poor country', Angola has one in two people living below the international poverty line of USD 1.90 per day[3]. Table 1 summaries the indicators discussed further in sections 2.3.1 and 2.3.2.

**Table 1: Angola's development and economic indicators (2021)**

| Indicator | Data |
|---|---|
| Human Development Index (<0.550 = low human development) ** | **0.586** |
| Life expectancy at birth (females/males, years) *** | 63.4 / 57.8 |
| Adult literacy rate (2021) *<br>Women<br>Men | 72%<br>62%<br>83% |
| Gender development index ** | 0.557 |
| Multidimensional poverty index (population near poverty) ** | 0.282 |
| Gross Domestic Product (2021)* | USD 67.4 billion |
| Gross Domestic Product per capita (2014) * | USD 1,953.5 |
| Total unemployment rate of labour force (youth unemployment rate, ages 15-24) **** | 28.8% (youth 52.4%) |

Note: HDI is a composite index measuring average achievement in three basic dimensions of human development - a long and healthy life, knowledge and a decent standard of living
Sources: Consultant's own elaboration based on * World Bank; ** UNDP; *** UN data - http://data.un.org/en/iso/ao.html; **** Trading Economics, 2023

### *2.3.1 Development status*

Despite the country's rapid post-war economic growth based on oil production, a high percentage of Angolans live below the poverty line and unemployment is widespread. Only about 70 % of the population is literate, and the rate drops to around 60 % for women. Population is expected to continue growing rapidly in the coming years with a fertility rate of more than 5 children per woman and a low rate of contraceptive use. Fewer than half of women deliver their babies with the assistance of trained health care personnel, which contributes to Angola's high maternal mortality rate.

Inequality is on the rise and gender inequality is one of the highest in the world, 0.578 in 2018 (higher than the average for sub-Saharan Africa, 0.572).

[3] Source: Multi-annual Indicative Programme (MIP) for the period 2021-2027 (Delegation of the European Union). NB: other sources indicate different numbers (e.g. the World Bank indicated a 14.6 % poverty rate, with the revised daily threshold of 2.15 USD per person - Poverty | Data (worldbank.org)

Angola is facing the worst drought in the last 38 years. The effects include food shortage, lack of potable water, diseased cattle and malnourished children, particularly in the south of the country. According to data collected by the World Food Programme (WFP) and the EU 'Strengthening Resilience and Food and Nutrition Security' programme (FRESAN) project data, people face high levels of food insecurity in all municipalities analysed (including 1.3 million people in crisis or emergency phase), and difficulties in obtaining food. The high vulnerability of domestic food production to climate shocks and climate change (with increasing rainfall variability) and the weak food systems trap farmers in small scale, low productivity, and subsistence agriculture.

Angola has a young population (47.18 % under 15) and an extremely high unemployment rate of 30.6 %, specifically for young people (55.3 % in 2022[4]) and a majority (80 %) of the workforce work in the informal sector[5].

Angola's Human Development Index (HDI) value for 2021 is 0.586 (see Table 1), which puts the country in the medium human development category, positioning it at 148 out of 191 countries and territories. The 2021 female HDI value for Angola is 0.557 in contrast with 0.617 for males, resulting in a Gender Development Index (GDI) value of 0.903.

### *2.3.2 Economic status*

Triggered by the outbreak of the Covid-19 pandemic and exposure to recurrent climate events, in 2020 the economy recorded its worst contraction in the last 40 years and real GDP fell by 5.2 %, exacerbating a recession that started in 2014. This protracted recession is mainly due to the declining production of oil (it accounts for 95 % of Angola's exports), lower prices, lower demand and a global commitment to reduce greenhouse gas, further highlighting the importance of economic diversification.

Angola's economy grew a little (by 0.7 %) in 2021. Per capita income contracted by 2.6 % in 2021 due to slower GDP growth and high population growth, estimated at 3 %. The modest GDP growth in 2021 was spurred by an increase in the oil price. The recovery in its price and revenues returned the fiscal balance to a surplus of 2.7 % of GDP in 2021 from a deficit of 3.8 % in 2020. Higher oil exports took the current account surplus to 11.4 % of GDP in 2021 from 1.5 % in 2020, while the debt-to GDP ratio declined to 95.9 % from 135 % over the same period. Revenues also benefited from fiscal reforms, including implementation of value-added tax and excise tax. Kwanza stability, together with tighter monetary policy in 2022, caused inflation to reduce significantly in 2022[6].

### *2.3.3 Investment and governance climate*

Angola was defined by the World Bank as a lower middle income country in 2020, and under the UN classification as a least developed country (LDC) and developing economy. The LDC status gives Angola the duty free and quota free market access to the European Union under the Everything But Arms scheme (EBA). In 2024 Angola is due to graduate from LDC status, however, it has recently requested postponement of its graduation.

Angola's current economic crisis underscores its need to diversify its economy and reduce its dependency on oil revenues. Angola has strengthened fiscal and debt sustainability, although the debt to GDP level remains high, and allowed for a flexible exchange rate, which works as an external shock absorber. The passage of the Public Finance Sustainability Law, Financial Institutions Law and new National Bank of Angola (BNA) Law has helped create the legal and institutional basis for stability. Angola has achieved progress in legislation, fiscal and financial reforms, and fighting corruption[7].

[4] Source: TradingEconomics.com 2023
[5] http://www.ipcinfo.org/ipccountryanalysis/details-map/en/c/1155109/?iso3=AGO
[6] Source : African Economic Outlook (AEO) 2022, as found on site afdb.org
[7] op. cit.

However, compared to its peers, Angola still has room to improve macroeconomic stability[8] and while world governance indicators have improved in recent years since the launch of reforms under President João Lourenço's administration, governance remains weak relative to peers.

## 2.4 Geo-political relationships

### *2.4.1 Participation in relevant organisations and international instruments*

Geographically, Angola has a privileged location in sub-Saharan Africa since, as it belongs to two African sub-regions (Central and Southern Africa). The strategic location of its main ports in the Southern Atlantic, served by road and rail connections, increases the geostrategic advantage of the transverse corridors, in particular the so-called "Benguela Corridor", crucial for the supply of neighbouring countries of southern Africa.

The economic dimension of its location is highlighted by its participation in two organisations: i) the Economic Community of Central African States - ECCAS and ii) the Southern African Development Community - SADC.

A Sustainable Investment Facilitation Agreement (SIFA) - the first EU agreement of this kind – was concluded in November 2022 between the EU and Angola. Angola is not however a signatory of the EU – SADC Economic Partnership Agreement (EPA) comprising Botswana, Lesotho, Mozambique, Namibia, South Africa and Eswatini (formerly Swaziland) signed in 2016. In 2020 Angola submitted a request to join the EPA. Negotiations for its accession to the EPA are expected to be launched soon. Accession to the EPA will ensure that Angola continues to benefit from duty free access to the EU market even after its graduation from LDC status.

From the point of view of maritime security, Angola is part of the South Atlantic Peace and Cooperation Zone - ZOPACAS established in 1986, made up of 24 countries and which aims to promote regional cooperation, maintenance of peace and security, and environmental protection. ZOPACAS also aims to develop cooperation agreements between the countries of the region, in order to enable the dissemination and use of successful national experiences in different sectors.

With regards to fisheries-related institutions, Angola is a member of the Fishery Committee for the Eastern Central Atlantic (CECAF) or Comité des Pêches pour l'Atlantique du Centre-Est (COPACE) and the Ministerial Conference on Fisheries Cooperation between African States bordering the Atlantic Ocean (ATLAFCO/COMHAFAT).

Angola is a Contracting Party of The International Commission for the Conservation of Atlantic Tunas (ICCAT), and fishing by EU fishing vessels is subject to Article 9 of Regulation (EU) 2017/2403 on the sustainable management of external fishing fleets, which states that 'A Union fishing vessel may only carry out fishing operations in waters of a third country on stocks managed by a Regional Fisheries Management Organisation (RFMO) if that third country is a contracting party to that RFMO'. Conservation and management measures adopted in the multilateral context of ICCAT are binding for all parties and therefore apply to EU fishing vessels wherever they operate. In the event an SFPA/Protocol is concluded between the EU and Angola, access conditions governing fishing opportunities granted to EU tuna vessels would have to be aligned with the various ICCAT relevant conservation and management measures in force and already transposed into EU legislation.

Angola has ratified the United Nations Convention on the Law of the Sea (UNCLOS) and the FAO Port States Measures Agreement (PSMA). Angola has not ratified either the UN Fish Stocks Agreement or the FAO Compliance Agreement.

[8] Source: IMF Country Report No. 22/12

Angola is member of the Benguela Current Convention (BCC), a multi-sectoral intergovernmental organisation established by the Republic of Angola, Namibia and South Africa to promote a coordinated approach to long-term conservation, protection, rehabilitation, enhancement, and sustainable use of the Benguela Current Large Marine Ecosystem. Under this Convention, the project on Enhancing Climate Change Resilience in the Small Pelagic Fisheries of the Benguela Current Large Marine Ecosystem, which falls within the FAO and Benguela Current Commission project on Enhancing Climate Change Resilience in the Benguela Current Fisheries System, is assessing the vulnerability of the small pelagic fisheries in the three BCC countries to the impacts of climate change, and investigating adaptation options for reducing vulnerabilities and strengthening the resilience of the fisheries to the impacts of climate change.

### *2.4.2 Maritime borders*

The Republic of Angola ratified the United Nations Convention on the Law of the Sea on 5 December 1999 and the current Law No. 14/10 of 14 July - Maritime Areas Act - regulates the exercise of powers, rights and duties of the Angolan state and defines the limits of maritime areas under national sovereignty and jurisdiction.

Angola has maritime borders to the north with the Democratic Republic of Congo and the Republic of Congo, the latter through the enclave of Cabinda, while the maritime border to the south is with the Republic of Namibia. While the southern border with Namibia has been agreed since 2002, the northern borders are subject of ongoing negotiations.

Angola's EEZ is the area adjacent to the territorial sea as defined in Article 7 of Law n.º 21/92 of 28 August on Inland Waters, the Territorial Sea and the Exclusive Economic Zone, and in the UN Convention on the Law of the Sea.

## 2.5 Trade from/to Angola

Angola mostly depends most for its imports on China, EU (mainly Portugal), USA, Brazil and South Africa. The most important import goods are refined petroleum, rice, machinery, poultry and palm oil.

The value of merchandise exports from Angola totalled almost EUR 41.5 billion in 2021, making for an increase of 125 % compared to 2020. Angola's export economy largely depends on crude petroleum USD 17.7 billion of which more than half is exported to China. Other important export products include diamonds, petroleum gas, refined petroleum, granite and seafood. Apart from China, other main markets are India, Thailand, UAE and EU (mainly Spain). Table 2 presents a summary of Angola's external trade for the period 2018 – 2021.

**Table 2: Summary of Angola's external trade, 2018 – 2021 (EURO millions)**

| Trade | 2018 | 2019 | 2020 | 2021 |
|---|---|---|---|---|
| Imports | 11 718 | 12 649 | 8 177 | 10 783 |
| Exports | 34 315 | 31 102 | 18 424 | 41 457 |
| Trade balance | 22 597 | 18 454 | 10 247 | 30 675 |

Source: EU General Directorate for Trade

The port of Luanda, so important for imports and exports, is a key priority for the Angolan government, and is set to receive an investment of close to USD 600 million from foreign entities that will carry out development and expansion work at the port. Other important ports up for renovation and expansion are the Port of Lobito and the port of Namibe[9].

[9] Source: https://www.marineinsight.com/know-more/major-ports-of-angola/

## 2.6 Fisheries sector development cooperation

### *2.6.1 EU/third-country cooperation strategy with Angola*

The current EU Multi-annual Indicative Programme (MIP) for the period of 2021-2027 provides synchronisation with the National Development Plan 2023-2027[10]. Its priority areas support the country´s progress in achieving the Sustainable Development Goals (SDGs).

The first priority area focuses on sustainable economic diversification, including climate-smart agriculture to increase productivity, food security and nutritional outcomes; investing in clean energy in line with the Africa-EU Green Energy Initiative and engaging with the private sector to promote resilient business opportunities and access to new markets.

With the priority area of transparent, accountable and effective governance, the EU supports Angola's efforts regarding the on-going judiciary reform; development of transparent and rule-based business environment; building the capacity of institutions charged with combatting corruption; improving the transparency and governance of the extractive industries; and supporting the decentralisation and electoral processes. In addition, the EU will build on existing programmes and design new ones related to public finance management and social protection.

With the third priority area of human development, the programme will support technical and vocational and training (TVET) interventions to enhance people´s skill sets and match them to the labour needs; continue to invest in Higher Education such as its support to universities' scientific and technological research. The EU will build on complementarities with regional programming to address science capacities.

The EU-Angola Dialogue Facility ('Facilidade de Diálogo UE-Angola**'**) aims to support actions promoted by Angolan and European institutions to deepen the regular exchange of knowledge and good practices in the areas defined by the Angola-European Union Joint Way Forward Agreement ('Acordo Caminho Conjunto Angola-União Europeia') and that have relevance to the National Indicative Programme of Angola 2014-2020 superseded by the Multi-annual Indicative Programme (MIP) 2021-2027, and the National Development Plan 2023-2027.

The actions already approved are as follows:

- Technical Training Project in Maritime Security, implemented by the Angolan Ministry of National Defense and the Ministry of National Defense of Portugal;
- Review of the fisheries resources stock assessment, implemented by INIP, the University of the Azores and the Department of Oceanography and Fisheries (INMAR) of Portugal;
- Dialogue on Blue Economy to improve the management of fisheries and other maritime sectors at the national level, implemented by the National Directorate of Maritime Affairs of the MINPERMAR.

If needed, the revision of the Fisheries Act 2004 could possibly be undertaken through this Facility (see section 3.3).

The EU has not developed large-scale regional fisheries programmes in recent years which have benefitted Angola.[11] However, the EU Delegation is currently formulating a support programme for the sector, which would have three components: management of fisheries resources, support for small-scale fisheries and the private sector, and health

[10] The National Development Plan 2023-2027 is not yet formalised and will supersede the previous National Development Plan 2018-2022.
[11] The 'Improved Regional Fisheries Governance in Western Africa' (PESCAO) programme supporter ECOWAS member states, and Angola is not a member of ECOWAS.

and hygiene issues. The estimated amount of intervention could be EUR 15-20 million, with an implementation period of 5-6 years from 2024[12].

### *2.6.2 Non-EU donor support for the fisheries sector in Angola*

Over the past decade, several countries have signed cooperation agreements with Angola[13]: within EU countries, only Portugal signed an agreement in 2019 in the area of Fisheries, Aquaculture and Sea Affairs. Other countries are Turkey (Bilateral Cooperation in Fisheries in 2017), Mauritania (Terms of Intent for Cooperation in 2019) and Argentina (Bilateral Cooperation in Fisheries and Aquaculture in 2015)[14]. Of note is a 'historic' Bilateral Cooperation agreement for training in fisheries and infrastructure with Poland in 2000, through which the Naval Academy of Moçâmedes was funded, and financial support for the Academy in terms of some equipment is still currently prevalent.

No bilateral cooperation agreements with other countries traditionally involved in fisheries cooperation, such as Norway, Japan, South Korea and China, are in existence. However, South Korea has recently supported the mariculture sub-sector, with the financing of a marine larviculture station in Luanda province.

The World Bank have not developed large-scale regional fisheries programmes benefitting Angola, like the 'West-Africa Regional Fisheries Project' (WARFP). At country level, the World Bank has not been involved in the fisheries sector.

The International Fund for Development of Agriculture (IFAD) and the African Development Bank (AfDB) are the two international institutions that have most strongly supported the fisheries and aquaculture sector in Angola: IFAD, under the Project 'Support to continental artisanal fisheries and aquaculture', which runs until 2023; and the AfDB, under the Project 'Support to maritime artisanal fisheries' for the construction and operation of 'support centres for artisanal fisheries' (CAPAs) along the entire maritime coastline of the country, also to be finalized in 2023. In both cases, the possibility of a subsequent phase is being assessed.

[12] Should it be decided to conclude an SFPA between the EU and Angola, this programme must naturally be taken into consideration when defining the content of the Sectoral Support in order to avoid duplication and seek synergies between interventions.
[13] Source: GJI/MINPERMAR
[14] Information from the Legal and Exchange Office (GJI), without further specification.

# 3 FISHERIES GOVERNANCE IN ANGOLA: INSTITUTIONS, LEGISLATION, POLICY AND MANAGEMENT FRAMEWORK

## 3.1 Institutional structures for fisheries sector management and research

Under the previous legislature, the Ministry Fisheries and Sea had been merged with Agriculture, fisheries becoming a National Directorate. Under the new legislature (since November 2022), fisheries is back under a full-fledged Ministry of Fisheries and Marine Resources (Ministério das Pescas e Recursos Marinhos ou MINPERMAR), due to a reaffirmed interest of the Government in the sector.

The organogram of the new Ministry was formalized in Presidential Decree n.º 284/22 of 8 December. The Ministry is led by the Minister and has a Secretary of State for Fisheries. It is comprised of the following main technical Directorates, Support Services ('Gabinetes') and subordinated Institutes/ entities more specifically linked to the fisheries industry, and whose major responsibilities are as follows:

National Directorates and Services:

- The National Directorate of Fisheries (DNP) is the service with the functions of development, direction, control and execution of the fisheries policy, and protection and development of fisheries resources. It plays a crucial role with regard to the management of resources and fleets (mechanisms for monitoring and controlling fishing activities, management measures, fishing rights and authorisations, registration of vessels).
- The National Directorate for Quality Management and Production of Salt (DNGQPS) has functions of design, direction, control and execution of the policy related to specialised infrastructure to support fisheries. It has a crucial role, notably in the health certification of fishing vessels, onshore facilities and import and export products (see section 3.6).
- The National Inspection Service for Fisheries and Aquaculture (SNFPA) is the body under MINPERMAR created to ensure the execution of the inspection and surveillance policy for activities carried out in the Angolan fisheries sector in order to enforce the established laws and regulations (see section 3.5).

Support Offices:

- The Office of Studies, Planning and Statistics (GEPE) is in charge of preparing policy measures and the overall strategy of the Sector. It plays a key role in analysing the overall execution of the Ministry's activities and in preparing statistics of the sector.
- The Legal and Exchange Office (GJI) plays a key role in drafting and reviewing legislation, and in relations with cooperation agencies.
- The Information Technology, Institutional Communication and Press Office (GTICII) is responsible for MINPERMAR's Online Office, which allows users to carry out some of the administrative procedures.

Subordinate institutions and port entities:

- The National Fisheries Investigation Institute (INIP) is in charge of scientific research on fisheries and the sea in general. It plays an essential role in the production of information on the state of fish stocks and the drafting of recommendations on their management.
- The National Institute for Support to the Fishing Industry (INAIP) is in charge of improving processing conditions (training of industry staff, products diversification etc.).

- The National Institute of Artisanal Fisheries and Aquaculture (IPA) is in charge of artisanal fisheries (namely, the censuses concerning the sub-sector, the construction and management of the CAPAs).
- There are two fishing ports in the country, one in Luanda (Pescangola, for PI and PSI, built 30 years ago) and one in Tômbua (for PSI, recently built).

Other entities are:

- The National Directorate of Aquaculture (DNA) which is in charge of the design, direction, control and execution functions of the aquaculture policy.
- The National Directorate for Sea Affairs and Marine Resources (DNAMRM) which is in charge of developing, participating and implementing national strategies for marine biodiversity and integrated ocean management, participating in the design, programming and execution of policies concerning marine resources and the sea. It deals notably with the issue of MPAs, in collaboration with the Ministry of Environment (see section 3.4).

MINPERMAR's Advisory Support bodies are: the Consultative Council (for sector strategies and policies), the Steering Committee (for planning, programming, organisation and control of the Ministry's activities), the Technical-Scientific Council (for planning and management plans for aquatic biological resources, national plan for the sea) and the Council for Integrated Management of Aquatic Biological Resources (for planning and management of fisheries and aquaculture resources).

Fisheries and maritime training relies on entities under the Ministry of Education and Higher Education, the Centre for Professional Training in Fisheries (CEFOPESCAS) built with funding from Spain in Ramiros/Luanda Province and inaugurated in 2020), and the Moçâmedes Maritime University (ex-Academia) funded with support from Poland.

Other entities of relevance to the fisheries sector, and potentially to any future SFPA/Protocol include:

- The National Maritime Agency (ANM), responsible for ensuring safety of navigation and protection of the marine environment, and for the registration of all vessels;
- The Angolan Navy: responsible for the protection of fisheries and the territorial and coastal waters, along with other responsibilities related to border control, pollution, etc.; it operates two 62 m long patrol vessels, used for joint fisheries patrols in collaboration with the SNFPA.
- The Ministry of the Environment and its National Institute of Biodiversity responsible for environmental protection (see section 3.4);
- Ministry of Mineral Resources, Gas, Oil and Industrial Security;
- The Ministry of Economy and Finance;
- The Ministry of Foreign Affairs.

Finally, the commercial ports of Luanda, Lobito/Benguela and Moçâmedes/Namibe are important for import/export operations, particularly of fisheries products.

## 3.2 National fisheries sector legislation, policy, and management

### *3.2.1 Fisheries Act (LRBA), General Fisheries Regulation (RGP) and accessory legislation*

The Law on Aquatic Biological Resources n.º 6-A/04 of 8 October[15] (LRBA) provides the legislative basis for managing the fisheries and aquaculture sector in Angola. It provides for: 1) general provisions, with chapters on fisheries planning (planning measures, TACs and fishing quotas, fishing effort limit regime), fishing rights), 2) measures for the protection of biological resources and the aquatic environment, with chapters on general protection and conservation measures, fishing gear and methods, high sea fishing,

[15] 'Lei dos Recursos Biológicos Marinhos', commonly referred to as 'LRBA'

scientific research (with scientific observers), monitoring (with obligations regarding catches, logbook and monthly information book, continuous monitoring equipment, community observers), 3) vessels and onshore facilities, with chapters on fishing vessels, fishing ports, processing facilities and marketing of fishery products, aquaculture, 4) resource control bodies and services, 5) accountability, with chapters on enforcement, infringements and civil liability.

Salient points are the following: TACs are set annually (but in many cases don't change between years and are not informed by scientific advice).The Ministry divides the fishing quotas into sub-quotas per vessel. Quotas are allocated as a percentage of the TAC for each species or fishery. Small-scale fishing is subject to a fishing effort limit regime. Fishing rights are granted for a period of 20 years. In granting commercial fishing rights, preference is given to applicants who can prove that they have onshore processing and wholesale distribution facilities. The Law has not been updated since 2004 (see section 3.3).

Decree No 41/05 of 13 June 2005 approves the General Fisheries Regulation which establishes the general and common rules for the implementation of the LRBA. In particular it sets out rules concerning: 1) the process for drafting a management plan, 2) conservation and preservation measures (maximum percentage of by-catch, authorised and prohibited gear, protection against pollution, areas for the operation of national fishing vessels: from 4 miles from the coast for PSI and IP), 3) fishing vessels (classification of vessels and respective fishing areas, recording of data), and 4) crew (professional qualifications of crew members, working conditions, composition).

In addition to the General Fisheries Regulation (2005), a series of other Regulations cover Fishing Rights Granting and Licensing (2005), Scientific Research (2005), Aquaculture (2005), Salt Iodisation Regulations, Fisheries Surveillance (2005), Health and Sanitary Requirements (2006), Continental Fishing (2013) and Sport Fishing (2013).

The Management Plan for Fisheries and Aquaculture ('Plano de Ordenamento da Pesca e Aquicultura' - POPA) 2018 - 2022[16] aims at a balanced and sustainable development of the sector, contributing to achieve the objectives of the Angolan Government, defined in the Long Term National Development Strategy 'Angola 2025' and the National Development Plan 2018-2022 (PND). In the PND, the general objectives specifically defined for the Fisheries and Aquaculture sector are: 'To promote the sustainable management of living aquatic resources, through a controlled increase in the catches of industrial, semi-industrial and artisanal fisheries' and 'To increase and promote the competitiveness of salt production and aquaculture in a sustainable manner'. The PND also identifies critical weaknesses of the sector, such as (1) The decrease in biomass of the main resources; (2) Insufficient human and business resources and capacities; (3) Lack of an integrated network for the marketing and distribution of fisheries products; and (4) Weak operability of the industrial fisheries sector in terms of processing.

The General Objective of POPA 2018-2022 is to promote the balanced and sustainable development of the sector at national level, contributing to national cohesion and unity, job creation and the improvement of the quality of life of Angolans, the fight against hunger and poverty, and food and nutritional security, as well as the competitive insertion of the country in the regional and international context, through the regulation and coordination of public and private sector activity.

The Specific Objectives for the five-year period are as follows:

1. Ensure the sustainability of resource exploitation;
2. Reduce regional imbalances and support national cohesion and unity;
3. Support and foster the improvement of entrepreneurship, economic efficiency and competitiveness of companies in the sector;

[16] From 30th March, a new Plano de Ordenamento do Espaço Marinho has been in place to support research and coordination between stakeholders, which further emphasizes the intention by Angola to make progress in fisheries governance.

4. Support and encourage the integrated, coordinated and sustainable development of all the sub-sectors in the fisheries and aquaculture sector with a view to maximising their overall contribution to social and economic development and minimising waste of resources and investment;
5. Create the conditions to ensure the value, quality and health safety of fish and fishery products throughout the value chain, minimising waste and making the best use of all the fish caught or produced;
6. Consolidate on a solid basis the fisheries administration, at Central and Provincial level, for participatory and knowledge-based management, including the indispensable monitoring, control and surveillance of fisheries and aquaculture;
7. Strengthen Institutional and International collaboration for the integrated management of shared resources, including environmental resources;
8. Strengthen the technical, professional and scientific qualifications of those involved in the sector.

POPA builds on the recent paradigms for the maritime sector of 'blue growth', and integrated resource management based on an 'ecosystems approach' for the fisheries and aquaculture sector.

Presidential Decree No 8/23 of 4 January defines the management measures for marine fisheries, inland fisheries, aquaculture and salt for the year 2023. The management measures aim at a) ensuring balance between the exploitation and conservation of aquatic resources; b) promoting sustainable aquaculture; and c) increasing salt production and quality, and are defined annually by Presidential Decree.

A TAC is set for the industrial and semi-industrial fishing segments, by resource/group of resources (shellfish, demersal and pelagic species), and for 2023 were respectively 5 390 tonnes, 77 086 tonnes and 311 870 tonnes, for a total of 394 346 tonnes. For small-scale fisheries, the indicative annual catch is 120 000 tonnes.

The TAC is broken down into fishing quotas allocated to authorized vessels through the individual vessel quota ('IVQ') management model. Fishing limits and effort are set for numbers of vessels per province for artisanal fisheries, with a total of 6 500 vessels, and in total for IF and SIF (115 and 132 respectively). A fishing certificate is issued for fishing directed at a resource (species or group of species). All resources caught by demersal trawling (fish and crustaceans) must be recorded in fishing logbooks, and are intended preferably for the domestic market.

By-catch percentages are defined for horse mackerel (15 % for purse seine during the closed season of June to August), pelagic trawling (5 % of demersal) and demersal fish trawling (5 % of cephalopods). Minimum sizes of species caught are defined by Law 6ª/04. Minimum mesh sizes and closed seasons are defined. Reserved areas (estuaries, 1 000 m safety zones for oil platforms) and fishing areas[17] are defined. Bans on certain gear and on catch of certain species are defined. Export of horse mackerel and corvina (croakers) is prohibited, while that of sardinella is subject to restriction. The import of fish is limited according to the consumption of the population.

Vessels must unload in predetermined base ports. Transshipment at sea from SIF and IF to transport vessels and/or artisanal fishing vessels is prohibited. Transshipment processes must be authorized by the competent authority and take place in ports or in bays, under control by the SNFPA.

Fishing for tuna and tuna-like species (including shark and swordfish) requires an authorisation from MINPERMAR and is subject to compliance with the recommendations established by ICCAT. Total fishing effort is limited to the authorisation of 100 vessels (up to 9 per company). A TAC is set for seal fishing (in numbers of pups and adults).

[17] The entire extent of territorial sea up to 4 miles and continental waters is reserved for artisanal fisheries. In particular for the IP: crab, gillnet, demersal trawl (depending on power), demersal trawl hake and deep-water shrimp (12 miles), pelagic trawl (15 miles), tuna (24 miles).

INIP is oriented to continue with the implementation of the National Biological Sampling programme. It can deploy an observer on board vessels, particularly SIF and IF vessels. The provision of statistical information by filling in the fishing logbook (SIF and IF vessels) is compulsory.

All fishing vessels with an overall length in excess of 15 metres must have on board Vessel Monitoring System (VMS) and an automatic identification system (AIS) as set out in the applicable legislation. Research and management guidelines are defined for the various National Directorates the SNFPA and the subordinate Institutes.

Summaries on access to commercial fishing activity and on management measures, on which the activity of foreign vessels is based, are presented in section 6.

### *3.2.2 Other relevant legislation, regulations and policies*

The National Plan for Fisheries 2023-2027 (called PLANAPESCAS) has similar objectives as the POPA (introducing the creation of MPAs as an additional specific objective); it indicates domestic consumption (18 kg per inhabitant per year), general guidelines on the fishing fleet, supply of services and inputs, logistics and distribution infrastructure and equipment, marketing policy, business environment, institutional capacity building and financial instruments and products. It presents production targets (based on an annual growth of 4 %), TACs and national consumption (based on a population growth of 3 % per year), as well as a 'SWOT' analysis of the sector. It does not contain a table of activities to guide its implementation indicating the amounts and sources of funding.

### *3.2.3 Recent developments in fisheries management*

Presidential Decree 284/14 of 13 October regulates measures to prevent, combat and eliminate illegal, unreported and unregulated fishing. The Regulation applies to all fishing vessels in Angolan waters and on the high seas, and to foreign vessels operating in partnership with national vessels in Angolan waters on the basis of agreements or contracts.

The essential elements that the Decree introduced are as follows:

a) Establishment of a list of national-flagged and foreign-flagged vessels engaged in IUU fishing;

b) Port control scheme prohibiting access by third country vessels engaged in IUU fishing;

c) Ban on the import of fish from IUU fishing, requiring a certification by the flag state that the fish product is legal;

d) Development of a national alert system interconnected with regional and international systems to combat IUU fishing;

e) Catch certificate for import and export, which will allow better traceability of fisheries products (see section 3.6);

f) Ban on the marketing of products stemming from IUU fishing and cooperation between inspection and surveillance authorities of the various bodies involved in the marketing of products;

g) Prohibition of national and foreign vessels involved in IUU fishing from accessing national ports, benefiting from port services and carrying out unloading and transshipment operations.

Implementation of this Decree is mentioned in section 3.5.

## 3.3 Fishery policy strengths and weaknesses

The LRBA dates from 2004 and has not been updated since then; delays in doing so are partly linked to the structural instability of the sector in recent years. The analysis of the modifications to be made is underway internally within the MINPERMAR. The intention is

to get a specialized legal team to come up with a revised Code (this work is possibly to be financed through the EU 'Dialogue Facility' (see section 2.6.1). Other associated pieces of legislation in the form of existing regulations to be amended are on hold until a revision of the Act has been finalized.

POPA 2028-2022 indicated that 'priority should be given to drawing up multi-annual management plans for the species most caught and which are overexploited or at risk of being overexploited, based on the best available information and drawn up in a participatory manner. According to POPA, Specific Management Plans should be drawn up according to the Ecosystem Approach to Fisheries for the most important fisheries: horse mackerel, deep sea crustaceans, coastal shrimp and coastal multi-species fisheries'. These plans have not yet been drawn up.

In addition, ICCAT stated in 2021 [18] that 'The National Plan of Action for the Conservation of sharks is not yet elaborated and this makes it difficult to enforce mitigation measures aimed at reducing the by-catch in the trawl and longline fisheries'. This assertion is still valid.

## 3.4 Specific national management of maritime space and marine protected area measures

The recent elaboration of the National Strategy for the Angolan Sea (ENMA) 2030 (Presidential Decree No. 183/22 of 22 July) and the Marine Spatial Management Plan represents an important milestone for the management of Angola's marine area. It will incorporate international best practices in planning that contribute to the conservation and sustainable use of marine, coastal and ocean space, facilitating the coexistence of all users for quality integrated planning, management and governance. During the development process of the Plan, special attention was given to the analysis of the main existing and future pressures and activities along the coast and at sea.

One of the conservation measures provided for in the LRBA is the creation of a network of marine protected areas (MPAs). During the POPA, the goal was to create up to two MPAs (one coastal and one oceanic), in collaboration with the Ministry of Environment. At the same time, the Network Management Plan for Marine Protected Areas (PORAMP) was to be drawn up, which would propose the classification and characteristics of the marine protected areas network, as well as the management and conservation measures to be applied. PORAMP was to be carried out in cooperation with the Technical Assistance Programme with the Kingdom of Norway. Because the MPAs have not yet been established, the specific conservation measures to be deployed within them are not yet known.

Currently, the creation of 6 MPAs (of which one with Namibia) is envisaged, based on the 7 EPSAs (marine areas of biological or economic importance) identified. Specific technical assistance (potentially under a SFPA sectoral support) would be beneficial to assist in this process.

## 3.5 Monitoring, control and surveillance

The National Inspection Service for Fisheries and Aquaculture (SNFPA) operates in four main areas: i) inspection of landings, ii) inspectors on board IF and SIF vessels, iii) control of the movement of vessels with LOA above 15 m by satellite (MONICAP system) and iv) surveillance at sea with dedicated inspection vessels.

### *3.5.1 At-sea and port surveillance, VMS, observers*

The SNFPA operates in collaboration with the two Navy vessels. It was equipped with 11 patrol vessels in 2012 that became obsolete, three of which were refurbished in 2020

[18] ICCAT - Annual report updates received after first publication, Angola – Full report, 16/11/2022

(one 30 m long and two 19 m long). It also has coastal boats. According to the 2004 LRBA, the presence of observers on board all IF and SIF vessels is mandatory. Since the SNFPA currently has only 28 observers (for a fleet of IF and SIF vessels of about 260 units), divided between the SNPFA headquarters in Luanda and its two representations in Benguela and Namibe (Regional Centres for Fisheries and Aquaculture Surveillance[19]), it gives priority to the most problematic/vulnerable fisheries, i.e. small pelagics and demersal trawlers.

With regard to satellite control, the Act obliges all IF and SIF vessels to be equipped with the electronic vessel monitoring system (MONICAP), which allows for the periodic determination of their location. Thus, the presence of a 'blue box' is mandatory, but only 61 vessels are currently equipped, of which 28 are functional. It is up to the Angolan authorities to finance such equipment, which represents a constraint in terms of budget and therefore a huge limitation in terms of the roll out and efficiency of the system.

The inspection and control system for industrial landings generally appears to work well for landings in the main industrial ports. There is a need however for more and better training of enforcement staff, particularly in the use and management of the MONICAP system, but also in the technical inspection of vessels and fishing gear. There is the prospect of a major restructuring project of the SNFPA (see section 2.6.2).

### *3.5.2 Key IUU risks and mitigation measures*

The major risks identified by the SNFPA in terms of IUU fishing are the following: i) fishing in excess of authorised quotas (IF and IUU vessels illegally transhipping fish to artisanal fishing vessels); and ii) failure to respect minimum sizes (species and mesh). Since artisanal fisheries are spread over 1 650 km of coastline, it is difficult to monitor their catches effectively. One major hindrance is the very limited number of functional 'blue boxes', as mentioned above.

In order to carry out its obligations of managing the sector, MINPERMAR is obliged by Law to make an inventory and maintain an up-to-date register that includes all fishing vessels in the country, as well as all companies and facilities related to fishing. For the proper functioning of the sector administration, it is essential that this register be permanently updated and easily accessible and searchable.

POPA reports that[20] 'the inventory of vessels belonging to the different segments is dispersed and incomplete. Although the register of the industrial and semi-industrial fleet is regularly updated, this is not the case for the artisanal, subsistence and recreational fleet. Additionally, information from the register is difficult to access due to the lack of a functioning database system. The management of the register is also hampered by the absence of a system in the vessel register that allows the tracking of vessels throughout their life, with the exception of the larger vessels, over 100 GT'. Although improvements have been achieved over the POPA period (2018-2022), there is still a need for improvement of the system.

In the last five-years, MINPERMAR has dedicated important human and financial resources to the 'Online Counter' ('Balcão Online'), MINPERMAR's information management system, accessible via the internet, which has made it possible to improve the management of administrative procedures (namely the fleet administration process and the issuing of authorisations).

Each registered vessel is given a unique national number and is identified by a unique number that will accompany it throughout its active life, regardless of changes of flag, name, owner, etc., allowing access to the ship's history. For vessels with a gross tonnage of over 100 Gross Tonnes, this number will be the international IMO number, which will be compulsory for all vessels in this size class. This amendment aims to contribute to

[19] The POPA states that "9 Fishing Surveillance Observation Posts are still in operation in the coastal provinces and in Kwanza Norte, equipped with land-to-sea communications (SSB, VHF and HF).
[20] POPA 2018 - 2022

better management of the national fleet, but also to promote the fight against IUU fishing.

Angola ratified the Agreement to Promote Compliance with International Conservation and Management Measures by Fishing Vessels on the High Seas and signed the Agreement on Port State Measures to Prevent, Deter and Eliminate Illegal, Unreported and Unregulated Fishing (PSMA). Angola has the initial legislation in place to combat illegal fishing (Presidential Decree 2014, see section 3.2.3) and a National Action Plan to prevent, deter and eliminate IUU fishing was expected during the POPA period but has not yet been developed.

### 3.6 Catch certification

As explained in section 3.2.3, Presidential Decree 284/14 of 13 October on IUU fishing specifies the certification regime for the import and export of fisheries products. It notably indicates that 'the exportation of catches made by national fishing vessels is subject to validation through a catch certificate for exportation purposes issued by MINPERMAR' and that 'except in cases of exportation of fishery products, national shipowners are exempted from presenting the catch certificates'.

Angola has notified the European Commission of the Angolan competent authorities with respect to catch certification in line with Art. 20 of the IUU Regulation.[21] With such a notification, Angola as a flag State has certified that a) it has in place national arrangements for the implementation, control and enforcement of laws, regulations and conservation and management measures that must be complied with by its fishing vessels, and b) its public authorities are empowered to attest the veracity of the information contained in catch certificates and to carry out verifications of such certificates on request from the Member States. Hence, Angola can validate EU catch certificates for fishery products.

### 3.7 Sanitary controls and certification of fishery products

The National Directorate for Quality Management and Salt Production (DNGQPS) is designated by law as the Competent Authority for hygiene and sanitary controls of fishing vessels and catches, and the issuance of export certificates (to Asia, Africa and the EU). In order to be exported to the EU, the products must i) have a catch certificate, issued by the DNP, ii) have been caught by vessels certified for export to the EU and iii) show positive results to the analyses carried out by INIP's laboratory (in a period which normally does not exceed one week). The National Directorate has around 15 accredited inspectors.

All IF and SIF vessels are compulsorily submitted to an annual hygiene and sanitary inspection, and only vessels that present the certificate of compliance issued by the National Directorate can proceed with the procedures for allocation of fishing authorisations and quotas. Currently, only 12 vessels (9 national shrimp trawlers and one demersal fish trawlers, all based in Luanda, and two seafood vessels from Namibia)[22] and one seafood processing/valorisation company (SICOPAL in Namibe, for the fishing and processing of crab)[23] are certified to export to the EU. Another processing company is in the process of being certified (Octosea, in Benguela, for processing of cephalopods). EU fishing vessels are not subject to certification requirements for export to the EU.

[21] EUR-Lex - 52022XC1020(02) - EN - EUR-Lex (europa.eu)

[22] Spanish boats are not on the list of vessels certified for the EU; they do not need a catch certificate, the DNGQPS just does some sanitary control.

[23] Source: list provided by INIP to DUE, 23/08/2022. The DN verbally indicated that there are currently 14 certified vessels.

# 4 THE STATUS OF FISH STOCKS

## 4.1 Pelagic stocks

### *4.1.1 Tuna stocks – highly migratory*

Tuna and associated species are highly migratory species. Thus, they are present in the high seas and in third country waters in the Atlantic Ocean. Tuna stock status are therefore assessed by the Atlantic RFMO ICCAT with the support of its Standing Committee on Research and Statistics (SCRS). ICCAT has an online dedicated page on its website summarising the stock status of several species it manages:

- Major tropical tunas:
  - The Eastern Atlantic skipjack[24] tuna stock and the yellowfin tuna[25] stock and are not overfished nor subject to overfishing (ICCAT[26]);
  - The bigeye tuna[27] stock is overfished but not subject to overfishing (ICCAT[28]);
- Small tunas:
  - There is little information available to determine the stock structure of many small tuna species. Based on available information, recruitment overfishing is not occurring in most of the small tunas including the frigate tuna[29] (ICCAT 2021 small tunas intersessional meeting summary).

### *4.1.2 Small pelagic stocks - straddling stocks*

The small pelagic stocks in Angola are straddling stocks: they are stocks being geographically spread over several third country waters including Angola.

The Angolan fisheries management authorities obtain stock status (and management advice) on these stocks from INIP. INIP base their stock assessments (and management advice) on their own analysis and from the regional organisation CECAF.

As a precautionary measure, the FAO-CECAF Working Group on the Assessment of Small Pelagic Fish – Subgroup South (WGASP-S)recommended that, for all small pelagic stocks, the level, of catches should not exceed the average of the last five or three years, or even, in certain cases, the catches of the previous year (2018). The next meeting of the WGASP-S is scheduled in November 2023. Information below is therefore from INIP and the latest FAO-CECAF Working group summary in December 2022 on small pelagic stocks in the South-Eastern Atlantic (most relevant ones for this ex-ante evaluation):

- Sardinellas (*Sardinella* spp.) – southern stocks: stocks shared between Angola, Congo, DR Congo, and Gabon, are are estimated to be:
  - Overexploited for the round sardinella (*S. aurita*); and
  - Fully exploited for the flat sardinella (S. maderensis)

  However, data are missing from some countries for both stocks.

- Cunene horse mackerel (*Trachurus trecae*) southern stock: the stock status is unknown as available data were not sufficient for the WGASP-S to apply an assessment model (FAO, 2022a). The stock faced 'intensive' fishing in Angola in 2017 according POPA, 2017 and the stock was estimated to be overexploited by CECAF in 2018 (FAO, 2019).

[24] *Katsuwonus pelamis*
[25] *Thunnus albacares*
[26] YFT last assessment in 2019, next assessment in 2023 - ICCAT 2019 SCRS report; Eastern Atlantic SKJ, last assessment in 2022 - ICCAT 2022-2023 (I) report
[27] *Thunnus obesus*
[28] BET last assessment in 2021, next assessment in 2024 – ICCAT report in 2021
[29] *Auxis thazard*

- Southern African pilchard (*Sardinops sagax*) (stock shared with Namibia): once an important fishery in southern Angola, since the 1980s the biomass has been too low to support a directed fishery (POPA, 2017, INIP, comm., March 2023). A TAC is set in Angola for this stock in association with the bluefish (*Pomatomus saltatrix*) and the European anchovy (*Engraulis encrasicolus*) stock (see Annex 6 for further details).

## 4.2 Demersal stocks

### *4.2.1 Crustaceans - shrimps*

Stock status is as follows for the key species of interest or potential interest to EU fishing vessels:

- Striped red shrimp (*Aristeus varidens*): fully exploited (CECAF, 2022).[30]

A stock assessment of demersal resources was carried out with Spanish support in December 2022. Results are expected to be available by mid-2023. Preliminary results of this assessment suggest some concerns about the status of some crustaceans stocks (coastal shrimps) (DG MARE, comm., February 2023).

### *4.2.2 Demersal fish stocks*

Hakes (*Merluccius* spp.[31]) – Angola region

The FAO – CECAF Scientific Sub-Committee estimate that hakes were overexploited in Angola in 2022 and recommended that fishing effort towards this stock should be decreased and the catch well monitored (FAO, 2022b).

Other stocks

For the Dentex species (*Dentex* spp.), recent stock status is unknown (CECAF, 2022b). The CECAF Working Group on the Assessment of Demersal Resources, Subgroup South, recommended in December 2022 a reduction in fishing effort for the different Dentex. Data from Angola were missing and, as such, the Working Group recommended that special attention in terms of improved information be given to the fishery in that country (CECAF, 2022b).

### *4.2.3 Cephalopods*

The cephalopods[32] in Angola waters are resources with potential for increased levels of catches by foreign vessels based on current stock status, according to INIP.

The cephalopod stocks[33] in Angolan waters were subject to low to moderate fishing exploitation in 2017. The biomass for cephalopods in Angola waters was estimated at slightly above 5 000 tonnes in 2017 (POPA, 2018 - 2022). Cephalopods are considered by INIP as underfished.

Yet, being very short-lived resources, their abundance fluctuates greatly between years in response to both fishing and environmental fluctuations (POPA 2018 – 2022) and Angola has applied a precautionary management approach for several years with an annual TAC at 1 400 tonnes (same TAC in 2017 – POPA 2018 – 2022).

The latest CECAF document from the Working Group on the Assessment of Demersal Resources, Subgroup South, does not include detailed information on the

[30] https://www.fao.org/3/cc3292b/cc3292b.pdf
[31] Such as the deep-water Cape hake *(Merluccius paradoxus)* and the Benguela hake (*Merluccius polli*)
[32] Such as squids (for instance the Angolan flying squid *Todarodes angolensis* and the common squid *Loligo vulgaris*), the common octopus (*Octopus vulgaris),* and cuttlefish (*Sepia* spp.) and
[33] Without a distinction by species or group of species

status of cephalopods present in the Angolan waters and there is no specific stock assessment available for cephalopods (cf. FAO, 2022).

### 4.3 Summary of status of stocks

Table 3 below summarises the status of the various stocks.

**Table 3: Summary of state of stocks, and 2023 TAC**

| Resources/ Groups of resources | Estimated status based on INIP, CECAF, POPA 2017, and ICCAT | TAC 2023 |
|---|---|---|
| **Crustaceans and molluscs** | | **5 390** |
| Striped red shrimp (*A. veridens*) | Fully-exploited | 700 |
| Deep-water rose shrimp (*Penaeus longigrostris*) | Fully-exploited | 1 200 |
| Coastal shrimp | Unknown | 90 |
| Deep-sea crab | Over-exploited | 2 000 |
| **Cephalopods** (cuttlefish, squids and octopus - *Sepia* spp., *Loligo spp.,* Octopus *spp.*) | Under-exploited | 1 400 |
| **Demersal species** | | **77 086** |
| Bigeye grunt (*Brachydeuterus auratus)* | Under-exploited | 18 000 |
| Large-eye dentex* and other Sparidae (**Dentex macrophthalmus)* | Under- to fully exploited | 11 958 |
| Grunts other than bigeye grunt (*Pomadasys* spp) | Under- to fully exploited | 9 066 |
| Croakers (e.g. *Miracorvina angolensis)* | Over-exploited | 8 206 |
| Hake from Benguela/Angola (*Merluccius polli)* | Over-exploited | 7 194 |
| Cape Hake (*M. capensis)* | Over-exploited | 2 436 |
| Largehead hairtail (*Trichiurus lepturus)* | Unknown | 4 000 |
| Groupers (*Epiphenelus* spp.) | Over-exploited | 327 |
| Other species | n/a | 15 899 |
| **Pelagic species – small straddling stocks** | | **311 870** |
| Round sardinella (*Sardinella aurita)* | Fully- or over-exploited | 200 000 |
| Flat sardinella *(S. maderensis)* | Fully-exploited | |
| Cunene Horse mackerel – southern stock *(S. maderensis)* | Suspected over-exploited / unknown | 40 000 |
| Mackerel (*Scomber japonicus)* | Unknown | 26 000 |
| Cape horse mackerel (*Trachurus capensis)* | Over-exploited | 15 000 |
| Southern African pilchard (Sardinops sagax), Bluefish (*Pomatomus saltatrix*), European anchovy *(Engraulis* – | Suspected over-exploited | 10 000 |

| Resources/ Groups of resources | Estimated status based on INIP, CECAF, POPA 2017, and ICCAT | TAC 2023 |
|---|---|---|
| *encrasicolus)* | | |
| **Large pelagic species: tuna and tuna-like species** | | |
| Skipjack *(Katsuwonus pelamis)* | Not overfished not subject to overfishing | |
| Yellowfin *(Thunnus albacares)* | Not overfished not subject to overfishing | |
| Bigeye *(Thunnus obesus)* | Overfished but not subject to overfishing (within 50% probability) | 3 500[34] |
| Other small tuna | Not overfished not subject to overfishing | |
| **Other species** | | 17 370 |
| **TOTAL** | | **394 346** |

Source: Consultant's own elaboration based on data and sources quoted in the table and collected information from sources mentioned in Annex 6

[34] Note that the TAC 2023 for tuna and tuna-like species defined in the 2023 Management Measures is inferior to the average annual catch of tunas by the EU fleet in recent years (5 776 tonnes, source: DG MARE data)

# 5 THE DOMESTIC FISHING SECTOR IN ANGOLA

The Angolan coastline, which is about 1 650 km long, includes the coastal Provinces of Cabinda, Zaire, Bengo, Luanda, Kwanza Sul, Benguela and Namibe (see Figure 1).

The Exclusive Economic Zone (EEZ) extends up to 200 nautical miles from the baseline and with a total area of 332 000 km$^2$. Almost all fishing takes place close to the coast and at a depth of up to 200 m corresponding to the limit of the continental shelf (with a maximum width of more than 95 km and a minimum of less than 2 km)[35].

The entire coastal zone is characterised in general by high biological productivity. One can distinguish: the North-Central zone, influenced by the Angola Warm Current, of more tropical characteristics with fishery resources of high diversity and average productivity; and the Southern zone, dominated by the Benguela Cold Current, of temperate characteristics with lower diversity but higher abundance of fishery resources.

The separation between these two systems, the Angola-Benguela Front, oscillates seasonally, moving almost to Benguela in the cold season, and to the border with the Republic of Namibia in the hot season.

As for inland waters, Angola has one of the largest hydrographic networks in Africa, with more than 20 000 km of rivers and more than 1 500 km$^2$ of lakes and lagoons. Most of these inland water bodies are concentrated in the north and east of the country. Most of the waterways have a permanent flow, allowing fishing all year round.

## 5.1 Domestic tuna catching sector

There are 4 authorised artisanal fishing vessels (< 14 meters LOA) that catch small tropical tunas as bycatch, and trap fisheries in Benguela province which target small tropical tuna species, mainly Euthynnus alletteratus (Merma). The annual reported catch of small tunas in the artisanal fishery was 9 678 kg in 2021.

## 5.2 Domestic non-tuna marine catching sector[36]

Fishing is administratively divided into four main segments, according to the size and technical characteristics of the vessels: industrial, semi-industrial, artisanal and subsistence fishing. There is marine and inland fishing, as well as aquaculture. According to the LRBA and the RGP, the current classification of vessels into the different segments is done according to considering their length overall (LOA) and the engine power (hp).

The artisanal and subsistence fleet is made up of mostly wooden boats, grouped into canoes, 'chatas' (flat-keel boats) with or without engine and 'catrongas' (decked boats with engine). The vessels have a LOA of less than 14 metres and engine power of up to 250 hp. Traditional vessels without engines are classified as subsistence fisheries. These vessels fish mostly with purse seines, gillnets, longlines, handlines and fish traps. They generally make daily trips within a short distance of their home port; a significant proportion make trips of 2 to 10 days to more distant fishing grounds, preserving the fish on ice or salt. In general, the vessels in this segment unload the fish directly on the beach. About 190 artisanal and subsistence fishing communities and landing sites are recorded along the entire coast.

The artisanal marine fishery currently has about 47 000 people (30 000 fishers and 16 900 women fish processors), and the inland fishery about 40 000 fishers and 9 000 women processors. In 2020, there were an estimated 7 900 artisanal marine fishing vessels (of which half are motorised, and two-thirds authorised (in 2019). The highest percentages of vessel numbers correspond to the provinces of Luanda (33 %), Benguela

[35] Source: PLANAPESCAS
[36] All quantitative information is either from PLANAPESCAS or the Statistical Yearbook of Fisheries 2021, GEPE, MINPERMAR

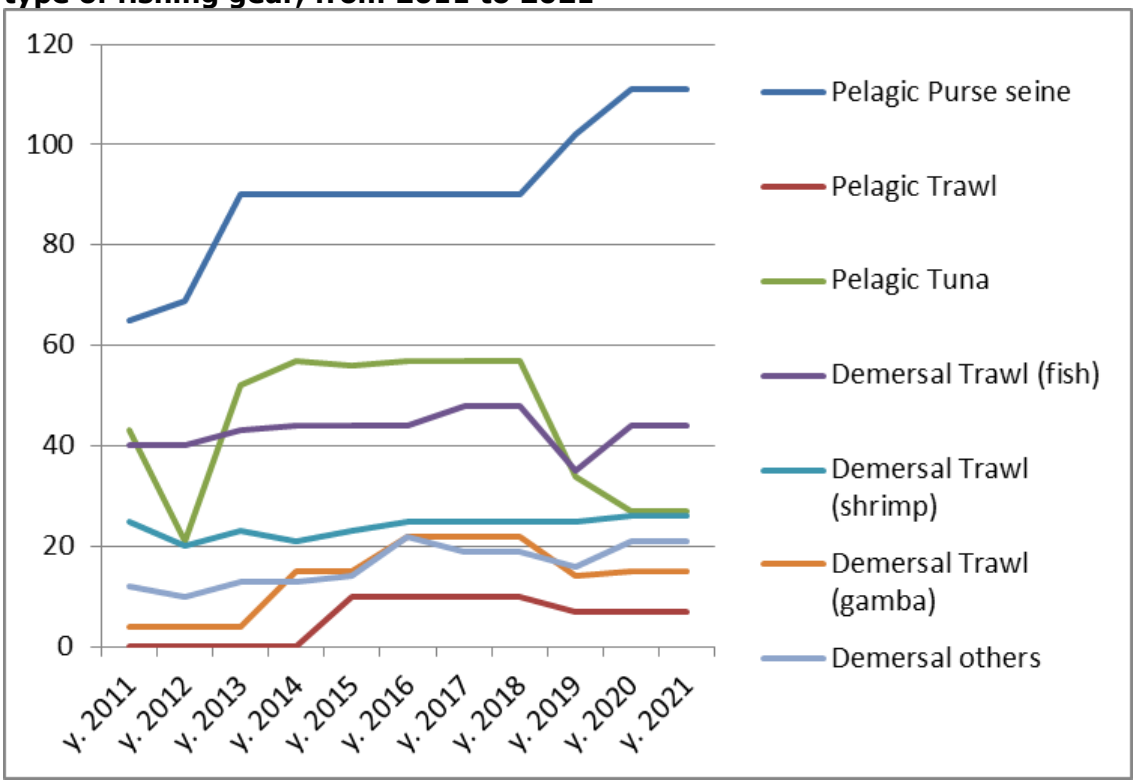
(26 %), Cuanza-Sul (11 %) and Namibe (11 %). There are approximately 9 600 vessels engaged in inland fishing.

The semi-industrial fleet uses vessels with wooden, fibreglass or steel hulls, with a LOA of 8.9 to 23.4 m and an engine power varying between 70 and 850 hp. Some have freezer capacity on board. Most of these vessels use purse seine targeting small pelagics, with some also using handline, longline or bottom trawling.

The semi-industrial fleet makes trips of one to five days, and in general the fishing areas are not far from their base port. Some of these vessels are associated with fishing companies with onshore facilities and private jetty facilities, where they unload the fish caught. The remaining fleet has no way of docking directly and unloads the fish off the beaches, transferring the fish to small boats that transport it to shore.

The industrial fishing fleet is made up of steel-hulled vessels with a LOA of more than 20 m and an engine of more than 240 hp. They use technologically advanced fishing methods, dominated by trawling (bottom and pelagic) and purse seine. Most of these vessels are equipped with freezing equipment and some process the fish on board, others are associated with transport boats to which they transship the fish in the Bay of Luanda (in the case of shrimp trawlers) and land their catches in the main ports (Luanda, Lobito and Moçâmedes). Finally, another group, dedicated to industrial purse seining, lands the fish directly on the jetties of the fish processing companies they are associated with (particularly at Baía Farta/Benguela and Tômbua/Namibe).

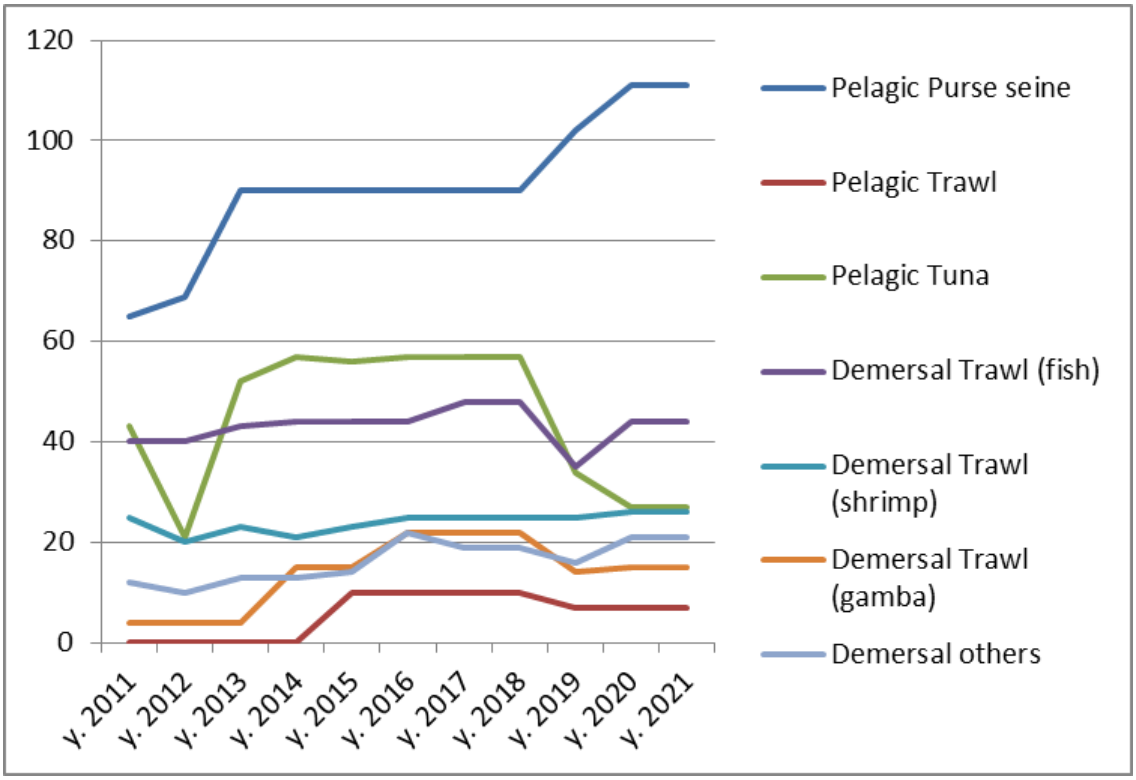
**Figure 2 and Figure 2 : Evolution of the number of IF and SIF authorisations by type of fishing gear, from 2011 to 2021**




Sources: POPA and PLANAPESCAS/MINPERMAR

Table 4 below show the evolution of the number of IF and SIF authorisations by type of fishing gear, from 2011 to 2021.

**Figure 2 : Evolution of the number of IF and SIF authorisations by type of fishing gear, from 2011 to 2021**




Sources: POPA and PLANAPESCAS/MINPERMAR

**Table 4: Evolution of the number of IF and SIF authorisations by type of fishing gear, from 2011 to 2021**

| Fishing gear | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 |
|---|---|---|---|---|---|---|
| **PELAGICS** | | | | | | |
| Purse seine | 65 | 69 | 90 | 90 | 90 | 90 |
| Trawl | 0 | 0 | 0 | 0 | 10 | 10 |
| Tuna | 43 | 21 | 52 | 57 | 56 | 57 |
| ***Sub-total Pelagics*** | ***108*** | ***90*** | ***142*** | ***147*** | ***156*** | ***157*** |
| DEMERSALS | | | | | | |
| Trawl (fish) | 40 | 40 | 43 | 44 | 44 | 44 |
| Trawl (shrimp) | 25 | 20 | 23 | 21 | 23 | 25 |
| Trawl (gamba) | 4 | 4 | 4 | 15 | 15 | 22 |
| Gillnet | 7 | 3 | 9 | 10 | 8 | 11 |
| Traps | 2 | 3 | 2 | 2 | 5 | 9 |
| Longline | 2 | 3 | 1 | 0 | 0 | 1 |
| Hook and line | 1 | 1 | 1 | 1 | 1 | 1 |
| ***Sub-total Demersals*** | ***81*** | ***74*** | ***83*** | ***93*** | ***96*** | ***113*** |
| **TOTAL** | **189** | **164** | **225** | **240** | **252** | **270** |

| Fishing gear | 2017 | 2018 | 2019 | 2020 | 2021 |
|---|---|---|---|---|---|
| **PELAGICS** | | | | | |
| Purse seine | 90 | 90 | 102 | 111 | 111 |
| Trawl | 10 | 10 | 7 | 7 | 7 |
| Tuna | 57 | 57 | 34 | 27 | 27 |
| ***Sub-total Pelagics*** | 157 | 157 | 143 | 145 | 145 |
| DEMERSALS | | | | | |
| Trawl (fish) | 48 | 48 | 35 | 44 | 44 |
| Trawl (shrimp) | 25 | 25 | 25 | 26 | 26 |
| Trawl (gamba) | 22 | 22 | 14 | 15 | 15 |
| Gillnet | 9 | 9 | 2 | 3 | 3 |
| Traps | 8 | 8 | 12 | 14 | 14 |
| Longline | 1 | 1 | 2 | 0 | 0 |
| Hook and line | 1 | 1 | 0 | 4 | 4 |
| ***Sub-total Demersals*** | 114 | 114 | 90 | 106 | 106 |
| **TOTAL** | 271 | 271 | 233 | 251 | 251 |

Sources: POPA and PLANAPESCAS/MINPERMAR

Industrial fishing operates all along the coast. Since most of the vessels have freezing facilities on board, they can make fishing trips of several weeks before reaching ports. The availability of ports and facilities for industrial vessels is limited, so more than 70 per cent of industrial vessels have Luanda fishing port as their base port.

In the period 2018-2021, an average of about 3 350 IF fishermen (almost exclusively in Luanda, Benguela and Namibe) and 920 SIF fishermen were registered. The average number of PI vessels was 160 and 92 for SIF, or a total of about 252 vessels on average in this period. In terms of fishermen as well as vessels, the numbers are relatively constant over the period.

The 251 IF and SIF authorisations issued in 2020-2021 were distributed as follows[37]: purse seine (111; 44 %), demersal trawl (44; 17.5 %), tuna purse seine (27; 10.8 %), shrimp trawl (26; 10.4 %), coastal gamba trawl (15; 6 %), crab trap (8; 3.2 %), pelagic trawl (7; 2.8 %) and miscellaneous (13; 5.2 %).

National production - The evolution of the national production by fishing activity during the period 2018 - 2021 is shown in Table 5 below.

**Table 5: Evolution of the national production by fishing activity, period 2018 - 2021 (in tonnes)[38]**

| Type of fishing | 2018 | 2019 | 2020 | 2021 |
|---|---|---|---|---|
| Industrial fishing | 200 539 | 219 933 | 197 526 | 279 362 |
| Semi-industrial fishing | 39 122 | 40 692 | 32 821 | 55 918 |
| Artisanal maritime | 171 810 | 98 585 | 112 246 | 233 799 |
| Artisanal inland | 29 032 | 16 762 | 9 778 | 24 173 |
| Aquaculture | 1 752 | 1 925 | 2 060 | 2 808 |
| **TOTAL** | **444 255** | **377 897** | **354 431** | **596 060** |

Source: Statistical Yearbook of Fisheries 2021, GEPE, MINPERMAR
Note: the significant increases in maritime production (in particular artisanal) in 2021 is not well understood.

For marine fisheries, small pelagics represent around 75 % of total production in volume terms (sardinellas 39.6 % and horse mackerel 19.3 %), demersal fish 24 %, crustaceans 1.1 % and molluscs 0.5 %. In value terms (at first sale) pelagics represent 67 %, demersals 29 %, crustaceans 3 % and molluscs 1 %, as shown in Table 6 below.

**Table 6: Marine fisheries catches by groups of species, 2018 – 2021 (in tonnes)**

| Species groups | 2018 | 2019 | 2020 | 2021 |
|---|---|---|---|---|
| Crustaceans | 4 338 | 4 285 | 5 255 | 4 438 |
| Molluscs | 3 968 | 1 728 | 1 616 | 1 830 |
| Demersal | 123 171 | 68 501 | 67 149 | 143 318 |
| Pelagic | 279 994 | 284 696 | 268 573 | 419 493 |
| **TOTAL** | **411 471** | **359 210** | **342 593** | **569 079** |

Source: Statistical Yearbook of Fisheries 2021, GEPE, MINPERMAR
Note: the significant increases in maritime production in 2021 is not well understood.

All fish caught in inland fishing is consumed domestically, and the vast majority of people involved in this activity are informal and combine the seasonality of inland fishing with other subsistence activities, namely agricultural activities.

### 5.3 Upstream supply sector

**Docking at ports** - Angola has only one industrial fishing port, the public company Pescangola at Boavista, Luanda, with a 1 200-tonne cold storage facility used to store the catches of foreign pelagic trawlers. The commercial ports of Cabinda, Soyo, Porto Amboim, Lobito and MOcâmedes also have capacity for docking vessels and unloading the catches of industrial fishing, but do not have public cold storage facilities.

The vessels of the semi-industrial fleet only have the ports of N´Zeto and Tômbua, where vessels up to 16 m LOA can unload their catches. The remaining semi-industrial fleet, along the entire coast, land their catch on the jetties of the companies they belong to or have commercial agreements with, or on the beaches. The integrated support project for landings at Baía Farta, where semi-industrial and industrial vessels may dock, is not yet operational. At the port of Boavista/Luanda a project is underway to remodel and modernize the infrastructure in the part reserved for docking the semi-industrial fleet.

[37] The distribution of the authorisations between foreign and national vessels is not available.
[38] Only the MINPERMAR "Anuário Estatístico das Pescas" for 2016, 2020 and 2021 are publicly available.

**Shipbuilding and maintenance** - The sector has eight formal shipyards with limited capacity to support both artisanal and semi-industrial fishing vessels with wooden hulls in the Provinces of Namibe (two), Benguela (three), Luanda (one), and 2 floating docks for the IF (the Repnav drydock in operation in Luanda and another drydock, for Pescangola, not operational). There are also an unspecified number of naval workshops operating informally, capable of building and repairing small artisanal fishing boats.

Currently, there is no shipyard capable of building industrial fishing vessels. The existing shipyards generally have operating difficulties, both in terms of equipment and specialised technicians, have little installed capacity, and repair and maintenance services are expensive. In particular, these yards do not provide the possibility of international certification for maintenance and repair of foreign industrial fishing vessels, which for this reason travel outside of the country (to Walvis Bay in Namibia in particular) for their annual overhauls or major repairs[39].

### 5.4 Downstream processing and marketing sector

**Processing industry** - There are modern seafood processing factories in Angola, mainly in Luanda, Baía Farta and Tômbua. Over the past 15 years, there has been a significant development of fish processing industry units (usually freezing small pelagics) through the provision of incentives to the private sector to invest in onshore structures. Particular attention has been paid to the Southern Provinces (since 2009 in Benguela and 2011 in Namibe, where the main fish processing industry units are located), where processing companies have made major investments in terms of rehabilitation of existing facilities and construction of new facilities for freezing and cold storage..

The companies involved in freezing and storing face a number of logistical difficulties, especially in terms of technical maintenance of their facilities and access to services essential to their activity - energy, water, various packaging materials, etc., as well as access to resources. There are numerous wholesale companies that buy frozen fish from industrial and semi-industrial facilities and resell it at national level or export it regionally.

The only canning factory (for tuna, sardines) in the country, in Tômbua, is not operational. The processing of fish into fish meal and oil (three units were started in 2008 and mainly processed sardines) has been banned on an industrial scale since 2019 by MINPERMAR. Some companies have recently invested in 'state-of-the-art' projects, e.g. the companies Octosea in Baía Farta and Sicopal in Moçâmedes.

**Salt and dried salted fish** - Salt is a strategic product in Angola, both for human consumption and industrial activities. Salt production averaged 145 000 tonnes per year in the period 2018 - 2021, mostly in Benguela Province (88%). Salt iodisation is mandatory by law. The salt is absorbed by the domestic market in its entirety. In 2019, there were 19 companies producing salt, generating about 1 500 jobs.

Salted and dried fish is traditionally consumed by the national population, especially in the inland provinces, for ease of transportation and longer conservation of the product. Fish from the IF and SIF and much of the catch from artisanal fisheries that is not absorbed into the cold chain, is sold at lower prices to a large number of small-scale processors, usually women processors, to produce salted dried fish, mostly in the Provinces of Benguela, Namibe and Kwanza Sul. The dried fish is packed in bales and transported overland to be sold in markets in the inland provinces or exported to countries in the region. Production of dried fish averaged 28 000 tonnes per year in the period 2018 - 2021.

[39] The bottom shrimp trawlers in particular take advantage of the closed season, in January and February each year, to carry out this maintenance.

**Consumption** - Fish is a highly important product in the diet of the Angolan population, with an annual per capita consumption of 18 kg in 2021[40]. It is estimated that 60 to 65% of fish landed nationally is consumed frozen or fresh. Angola imports large quantities of fish, particularly horse mackerel (see section 5.6). Traditionally, the vast majority of the population buys from urban markets, landing beaches, urban shops and fishmongers. The unit cost of protein from pelagic fish (fresh, frozen and dried) is among the lowest for animal protein and is of high quality. A small proportion of consumers use modern supermarkets in the main Angolan cities to buy fresh, frozen and dried fish.

## 5.5 Aquaculture activities

Aquaculture activity is grouped into two sub-sectors, communal aquaculture, aimed at improving the income and food and nutritional security of rural populations, and commercial aquaculture, dedicated to production for commercial and industrial purposes.

Aquaculture production is negligible, even though it is growing steadily. Marine aquaculture is practically non-existent. The sector has around 900 enterprises, only a quarter of which are operational. The most produced species is tilapia ('cacusso') and to a lesser extent catfish (clarias), farmed in rural communities, essentially for self-consumption. There are two tilapia larviculture centres (in Kwanza Norte and Cuando Cubango) and two Experimental Aquaculture Stations (EASs) in the provinces of Malange (in Massangano, under the IFAD project) and Benguela, aimed at promoting communal aquaculture in the north-east and south of the country, supplying small fish farmers with fingerlings for fattening.

Several mainland commercial aquaculture units are already in operation, focusing almost exclusively on the production of tilapia using intensive processes, with improved seed and the use of specially formulated feed rations (there are several local private companies producing feeds). Most of these units have their own improved fingerling production facility. Aquaculture production between 2018 and 2021 averaged 2 000 tonnes[41], with the highest production in the Uige province.

In the coastal locality of Ramiros/Luanda, the Project for the Development of Technologies for the Improvement of Fisheries Resources in Angola, which started in 2018 with support from South Korea, was recently implemented. The project's main objective is the application of modern technologies in larval rearing for environmental restocking, as well as the improvement of potential species for mariculture. Taking into consideration the challenges of aquaculture in the marine environment, priority is given to the development of mariculture projects for bivalve molluscs (in particular, oyster and mussels) and possibly other species (shrimp and fish)[42].

## 5.6 Fisheries trade

**Imports** - Due to the habit of fish consumption by the Angolan population, and despite the high national production, there are important imports of fish and fishery products. Most of these imports are frozen small pelagics (mainly horse mackerel). The import of horse mackerel is limited by an annual Presidential Decree[43]. In 2018 and 2019, about 33 000 and 13 000 tonnes of horse mackerel were imported respectively, mainly from Mauritania, New Zealand and Chile. From 2018 to 2021, an annual average of about 8 000 tonnes of other fisheries products were imported, mostly from Portugal.

**Exports** - In terms of exports, crustaceans represented 64 % in value, fish 31 %, molluscs only 2 % and 'others'3 % for the period 2018 - 2021. In the group of crustaceans, 'alistado' represented half, of which one third was exported to Spain.

[40] Source: PLANAPESCAS
[41] Source: Statistical Yearbook of Fisheries 2021, GEPE
[42] Source: POPA
[43] Quantities are limited to minimize competition with national fishermen while also providing imports for food security (e.g. 90 000 tons maximum in 2016, 70 000 t maximum in 2018 i.e. not necessarilyy the amounts actually imported)

Miscellaneous fish is mostly exported to Ivory Coast (32.5 %), Ghana (21.0 %), the D.R.C. (12.0 %), Nigeria (9.1 %) and China (7.3 %). Fishmeal was exported to Thailand and Vietnam. The export of horse mackerel was banned in 2018 to favour of supplying in the local market, which explains the drastic decrease in fish exports from 2019 onwards. Table 7 below presents the evolution of the quantity of fishery products exported over the period 2018 - 2021.

**Table 7: Evolution of the quantity of fishery products exported in the period 2018 - 2021 (in tonnes)**

| Products | 2018 | 2019 | 2020 | 2021 |
|---|---|---|---|---|
| Miscellaneous fish | 66 722 | 4 098 | 14 769 | 16 844 |
| Crustaceans | 3 302 | 2 009 | 2 808 | 3 218 |
| Molluscs | 830 | 215 | 1 260 | - |
| Fish meal | 8 266 | 1 200 | 200 | - |
| **TOTAL** | **79 120** | **7 522** | **19 037** | **20 062** |

Source: Statistical Yearbook of Fisheries 2021, GEPE

***Fisheries Trade from/to the EU -*** Imports from the EU have been relatively stable over the last five years, in quantities and values (around 2 000 tonnes per year with a value of around EUR 22 million). in contrast, the exports have drastically reduced over the period, probably linked to a reduction in the fishing effort of the Spanish fleet, with about 2 800 tonnes valued at around EUR 14 million per year on average (see Table 8 below).

**Table 8: Imports and Exports of fish products from/to the EU, 2012 – 2022 (in volume and value)**

| Products/Period | 2018 | 2019 | 2020 | 2021 | 2022 | Average per year |
|---|---|---|---|---|---|---|
| **IMPORTS - Fish and crustaceans, molluscs and other aquatic invertebrates** | | | | | | |
| Quantities in tons | 2 142 | 1 804 | 1 746 | 1 789 | 1 967 | 1 890 |
| *Value in EUR 1 000* | *22 692* | *19 887* | *19 721* | *22 552* | *23 658* | *21 702* |
| **EXPORTS - Fish and crustaceans, molluscs and other aquatic invertebrates, Prepared or preserved fish, miscellaneous** | | | | | | |
| Quantities in tons | 5 149 | 2 336 | 1 718 | 2 050 | 2 770 | 2 805 |
| *Value in EUR 1 000* | *24 568* | *12 097* | *8 596* | *9 056* | *15 378* | *13 939* |

Source: COMEX, extracted 3/16/2023

# 6 DISTANT WATER FISHING ACTIVITY IN ANGOLA'S EEZ

## 6.1 Access to Angola's EEZ

### *6.1.1 General conditions of access*

The conditions for fishing in Angola's EEZ are set out in the 2004 Law, the 2005 General Regulations and in the Annual Fisheries Management Measures.

Under the terms established in the LBRA, the RGP and ancillary legislation, access to commercial exploitation of fisheries resources under Angolan jurisdiction requires four successive steps: (1) the registration of the company; (2) the allocation of commercial fishing rights to an Angolan individual or legal person, with a validity of 20 years; (3) the allocation of a fishing authorisation, with a validity of one year renewable, to a commercial fishing vessel, upon request of the Angolan holder of commercial fishing rights and (4) the allocation of an annual fishing quota, establishing the maximum quantity to be caught of each target resource, to a vessel holding a commercial fishing authorisation. Individuals or legal persons wishing to obtain registration, rights, authorisations or commercial fishing quotas must pay a fee for the issuance of each of these. However, no fee is payable for maintaining the fishing right, which is multi-annual.

The exploitation of fisheries resources, for both domestic and foreign vessels is managed on an annual basis. Management measures fall into three main groups: (i) entry control measures, limiting the fishing effort applied in each fishery (number of vessel authorisations allocated for each resource group, fishing gear and fleet segment); (ii) exploitation control measures aimed at limiting the catches (regulation and control of TACs and quotas; upon proposal of the fisheries research institute and taking into account biological and socio-economic aspects, the Fisheries Administration shall annually establish the TAC for each resource or group of resources as the maximum that can be caught in the considered year. The TAC established annually is distributed in fishing quotas to the industrial and semi-industrial fishing companies that request it; (iii) technical measures, which regulate aspects such as closed seasons and areas, allowed fishing gear and minimum catch sizes.

The following indications also relate specifically to foreign access:

- Article 31 of the (LRBA): 'National or foreign individual or legal persons meeting the requirements of this law and the legislation that regulates it may hold fishing rights. Artisanal fishing rights shall be granted only to Angolan nationals'.
- Article 32 of the LRBA: 'Angolan nationals shall have preference in the granting of fishing rights. Fishing rights in territorial waters shall be granted exclusively to Angolan persons or individual or legal nationals of SADC Member States. (...) Fishing rights in the sea beyond the first 12 nautical miles shall be granted only to foreign individual or legal persons in association with Angolan nationals'. In practice Article 32 thus obliges foreign shipowners to enter either into a 'comparticipation association' or to create a joint venture [44] with an Angolan partner holder of a fishing right issued by the MINPERMAR.
- Article 35 of the LRBA: 'Fishing rights shall comprise (...) the right of ownership and the right to market the resources caught under the concession, including authorised by-catch'.
- Article 106 of the General Regulation: 'For fishing vessels operating in Angolan waters, except for high-sea tuna vessels, foreign crews may not exceed 25 % of the total crew and in each category of crew).

[44] In the case of a joint venture, the national partner must have at least 51% of the capital.

The LRBA states the following in relation to international agreements: Article 50: 'In the event of surplus resources being available as determined by INIP, after giving priority to Angolan nationals for the granting of fishing rights, the Government may, taking into account fisheries planning measures, conclude bilateral or multilateral agreements with States interested in granting their nationals fishing rights in the Angolan EEZ. International agreements may not establish more favourable conditions for nationals of foreign parties than those provided for by law for Angolan persons'. Determining the surplus available is put into practice through the setting of TACs for different species allocated to different fleet segments (including foreign ones), although as noted the science available to INIP to determine surplus resources and TACs is, for many stocks, poor.

Additionally, Presidential Decree 284/14 of 13 October on measures to prevent, combat and eliminate IUU fishing stipulates that 'in order to prevent, deter and eliminate IUU fishing, national shipowners and/or operators of fishing vessels must submit partnership contracts for approval to MINPERMAR, and the foreign contracting party must be duly identified' and that 'chartering a foreign fishing vessel entered on the list of vessels that have engaged in IUU fishing is prohibited'.

The rates applicable to fishing vessels, including foreign vessels, are set out in Regulation n.º 34/06 of 10 March and are presented in Table 9 below for the main fishing categories where foreigners are represented (the rates for national vessels are indicated for comparison purposes).

**Table 9: Fishing authorisation fees applicable for foreign (and national) vessels fishing in Angola (in 'Unidades de Correção Fiscal' (UCF))[45]**

| **SIF and IF (including Bigeye tuna) - Fee for the concession of fishing right and issuing of concession for:** | **Albacore tuna - Authorisation fee, fishing fee, fishing certification fee (per year)** |
|---|---|
| • SIF: 353<br>• IF: 599<br>• Bigeye tuna: 29 520 | 861 |

| | **National Fleet** | | **Foreign Fleet** | | | |
|---|---|---|---|---|---|---|
| Fishing fee (per tonne of quota allocated per year) | SIF | IF | SIF | | IF | |
| Deep-water shrimp trawling | NA | 492 | NA | | 984 | |
| Demersal trawling (snapper, croaker, grouper) | 197 | 246 | 287 | | 492 | |
| Demersal trawling for hake | 246 | 328 | 492 | | 574 | |
| Demersal cephalopod trawling | | | 213 | 262 | 304 | 590 |
| Crab trap fishing | | | 246 | 492 | NA | 984 |
| Pelagic trawling horse mackerel | | | 25 | 33 | 41 | 49 |
| Pelagic trawling sardine, mackerel | | | 20 | 28 | 36 | 44 |
| Horse mackerel purse seine | | | 20 | 28 | 36 | 44 |
| Sardines, mackerel purse seine | | | 16 | 25 | 31 | 36 |

[45] Note**:** Additional elements concerning the current value of an UCF and the quotas allocated per vessel / type of fishery were not provided by DNP.

| | | | | |
|---|---|---|---|---|
| 'Sardinha do reino' purse seine | 25 | 33 | 41 | 49 |

Source: DNP

The POPA stated that 'the licensing of 100 % Angolan-owned vessels will be encouraged in all fleet segments, as a measure to increase the number of jobs for nationals, as well as to promote regional development. The "Angolanisation" of the fleet will take place with incentives to acquire the Angolan flag for foreign vessels currently operating in Angola.

In order to encourage this Angolanisation of the fleet, the fees to be paid by foreign-flagged fishing vessels should remain higher than the fees paid by national-flagged vessels. During the life of the POPA, these fees will gradually increase and will be updated annually. From 2018 onwards the fees to be paid by tuna vessels with encircling gear, and longline vessels of the non-national fleet, with a LOA greater than 24 m, will be gradually updated to reach the values paid at international level at the end of the term of the POPA'. This update does not appear to have been introduced and the 2006 rates remain in force.

The POPA also indicates that 'to contribute to the reduction of discards at sea and the best use of the total fisheries resources, the obligation to land by-catches will be progressively introduced in all fisheries. From 2019, all 'other by-catch species', as defined in the TAC projections and allocated fishing quotas, will be compulsorily landed and marketed. Over the life of POPA, a review of the legal framework will be undertaken with the aim of mandatory landing of all bycatch. This review, coordinated by fisheries research and administration, will be based on knowledge and optimisation of the selectivity of the gear used, target species and their dimensions and the actual conditions of the fisheries. Until the entry into force of the legislative revision described above, catches of 'other bycatch species' in excess of the values provided for in the quota referred to will be subject to the payment of fines in accordance with the legislation in force'. As indicated in section 3.3, the 2004 LGRB has not yet been updated, so this obligation to land bycatch in all fisheries is not yet enforced.

### *6.1.2 Possible changes to Angolan legislation necessary for a SFPA*

As mentioned in the introduction of this evaluation, the agreement was denounced by the EU in 2006, due to the legislative framework adopted in Angola in October 2004 (and as summarized above). The 'Legislative Financial Statement' to the Commission proposal for a Council regulation denouncing the agreement, stated that 'In accordance with the new national legislation adopted by Angola, foreign vessels operating in Angolan waters must comply with a number o fprovisions notably requiring that each vessel is operated by an Angolan joint venture and that its catch is of Angolan origin. To this end, all foreign vessels operating in Angolan waters would have to fly the Angolan flag. As these provisions are not compatible with fishing by Community fishing vessels in Angolan waters, the negotiations on a Fishery Partnership Agreement between the Community and Angola have been suspended. Moreover, the current Agreement between Community and Angola should be denounced since it is not compatible with the new Angolan legislation'.[46]

The 2005 proposal to denounce the old fisheries agreement may have incorrectly interpreted Article 32 of the LRBA to mean that foreign vessels would have to fly the Angolan flag. The requirement for foreign entities to associate with Angolan nationals does not in and of itself require foreign vessels to fly an Angolan flag. Article 31 indeed implies that this is not the case as provides for foreign entities to hold fishing rights, and evidence bears this out as currently EU (and other foreign vessels) operating in Angola do so under their national flags. Likewise, concern about the legislation meaning that

[46] Proposal for a council regulation denouncing the Agreement between the European Economic Community and the Government of the People's Republic of Angola on fisheries off Angola and derogating from Regulation (EC) No 2792/1999

catches need to be of Angolan origin may have been misplaced, and have been based on the assumption that all foreign vessels would have to fly an Angolan flag. Current catches by EU flagged vessels have EU origin. And rules of origin are determined by the Everything but Arms (EBA) unilateral preference scheme and when Angola joins the EPA it will be bound by rules of origin as stipulated therein, rather than specifically by the SFPA or domestic legislation.

Nevertheless, revision of Article 32 of the LRBA may be a precondition for a future SFPA[47] if not acceptable to the EU.

The legislation is currently and already under review in Angola, meaning that it may be appropriate for the EU to make specific recommendations as to specific Articles which it would need amending from the EU perspective and related to the functioning of a SFPA. The steps involved in Angola for amending the legislation are: drafting of the law; submission of the law proposal to the Council of Ministers for approval by the Fisheries Minister; submission to the National Assembly for approval; signature by the National President; and publication in the Official Journal. The timeframes for legislative change in Angola and working through these steps are difficult to define, as are typically dependent on how high issues are on the agenda. Fisheries appears to be a high priority for the legislature at present, and it could thus be realistic to expect legal changes by the end of 2023.

## 6.2 Number and types of vessels fishing in Angola

The maximum number of IF and SIF authorisations to be awarded by MINPERMAR is defined annually (except for tuna) under the "Management Measures" for the respective year. Deep-sea shrimp, pelagic trawling and demersal hake trawling authorisations are for IP only, while demersal fish, crab, gillnet, purse seine (for small pelagics) and cephalopod trawl authorisations are for IF and SIF. Cage fishing and coastal shrimp fishing are SIF only.

Table 10 below indicates the maximum numbers of authorisations defined under the 2023 Management Measures, the number of vessels authorized to fish in Angola in 2023 and the level of use of the corresponding resources[48]**.**

[47] There remain uncertainties at the time of writing as to which specific parts of the legislation would need to be revised, due to a lack of answers to questions posed by the evaluators to the Angolan fisheries administration.

[48] Note: this table was not validated by the DNP; in particular, the exact number of authorisations issued to foreign vessels was not provided**.**

**Table 10: Foreign and domestic industrial and semi-industrial fishing authorisations, 2023**

| | | | INDUSTRIAL FISHING - Nº of authorisations issued in 2023 | | | |
|---|---|---|---|---|---|---|
| | Maximum no of authorisations 2023 | | No of authorisations issued to EU vessels | No of authorisations issued to non-EU foreign and national vessels | Total no | Level of use of the resources (Open/Closed fishery) |
| **Type of gear / resource** | IF | SIF | Nationality | | | |
| Pelagic trawl | 6 | NA | 0 | 6? | **6** | 100 % |
| Demersal trawl for fish | 38 | 15 | **Portugal:** 3 | 35? | **38?** | 100 % |
| Demersal trawl for hake | 2 | | 0 | 2? | **2?** | 100 % |
| Deep-sea prawn | 25 | | **Spain:** 9 (Crustangola) | Crustangola : 11 | **25** | 100 % |
| | | | **Spain:** 2 (EDIPesca) | Namibia: 3 (EDIPesca) | | |
| Crab | 3 | 6 | 0 | 1 IF(Japan), 5 SIF | **?** | 100 % |
| Cephalopods | 4 | 6 | 0 | 1 | **?** | 50% |
| Gillnet | 10 | 5 | 0 | national | **?** | 40 % |
| Purse seine (small pelagics) | 20 | 100 | | PSI 90 % national; IF: Namibia / RSA | **?** | 100 % |
| Longline | 7 | (not spec.) | 0 | 1 IF surface | **-** | - |
| | | | | 2 SIF (bottom) | **-** | - |
| Tuna (*) | NA | NA | 20-25 purse seiners (**Spain and France**) | 1 SIF longliner (since 2021) | **-** | - |
| **TOTAL** | **115** | **132** | | | | |

IF: industrial fishing; SIF: semi-industrial fishing
(*) Not specified in the Management Measures
Source: DNP/MINPERMAR (in particular the last column) and elaboration by the consultants on the basis of the answers to the questionnaires from EU stakeholders.

IF is practiced by both vessels under foreign flag and vessels under national flag.

Non-EU foreign vessels are demersal fish vessels (mostly Chinese), shrimp vessels (4 Namibian vessels), small pelagic trawlers (from Eastern European countries) and tuna vessels (some tuna purse seiners from Namibia and South Africa). SIF vessels are exclusively national/Angolan.

China is present through commercial agreements only, concerning notably demersal trawling (authorisations are granted to Chinese-flagged or Angolan-flagged vessels with Chinese interests)[49].

Turkish and Angolan parties would be interested in developing small pelagic fishing with semi-industrial and industrial fishing vessels (with 'Refrigerated Sea Water (RSW) system), probably similar to the cooperation/activities developed over the last decade by Turkish operators in Mauritania.

[49] As set out in Chapter 6, precise information on the activities of these fleets was not shared with the mission.

The EU fleets currently operating in Angolan waters, under direct authorisations, are only in three categories:

i) 11 deep-sea shrimp trawlers (fishing in a proportion of catches stipulated at 70% 'alistado' and 30% shrimp), exclusively Spanish;

ii) 3 Portuguese trawlers for demersal fish (4 Spanish trawlers worked between 2015 and 2021) and

iii) about 20-25 tuna purse seine vessels (Spanish and French).

making a total of about 35 vessels (for tuna and demersal fishing). No EU pelagic trawlers have been operating in Angolan waters over the past 5 years (although a Lithuanian vessel operated in 2015-2016).

Total catches by EU vessels as recorded by the Commission are provided in Table 11 below.

**Table 11: Catches by EU fishing vessels active in Angolan waters through direct authorisations, by group of species, in tonnes by year (2018 – 2022)**

| Group of species | 2018 | 2019 | 2020 | 2021 | 2022* |
|---|---|---|---|---|---|
| Tunas | 13 430 | 2 559 | 7 827 | 4 839,8 | 3 708 |
| Cuttlefishes | 3,9 | | 0,2 | | |
| Flatfishes | 1,5 | | | | |
| Hakes | 1 089 | 1 464 | 2 944 | 2 221,5 | |
| Mackerels, seerfish, anchovies | 838 | 550 | 839 | 284,8 | 1,0 |
| Marine fishes | 3 976 | 2 078 | 1 140 | 382,8 | 14 |
| Octopuses | 3,3 | | | | |
| Other Cartilaginous | 0,2 | | | | |
| Other Crustaceans | 297 | 318 | 203 | 139,0 | 138 |
| Sharks | 63 | | | | |
| Shrimps | 1 519 | 1 421 | 1 323 | 1 563,5 | 1 447 |
| Squids | 260 | 410 | 585 | 44,5 | |
| Swordfishes | | | 0,4 | 3,2 | 0,4 |
| Other | 24,8 | 2,1 | 6,9 | 17,1 | 7,0 |
| **TOTAL** | **2 106** | **8 802** | **14 867** | **9 496** | **5 316** |
| ***TOTAL (aggregated update for 2022 on 12/03/23**)*** | | | | | ***5 936*** |

*Provisional data. Source: Consultant's own elaboration based on data provided by EU Member States to DG MARE (EC). Figures rounded if more than 5 tonnes

** detailed data for the year 2022 not available at the date of writing the report

# 7 EX-ANTE EVALUATION

## 7.1 Needs to be met in the short or long term

### *7.1.1 Needs shared by both the EU and Angola*

The primary shared need of the EU and Angola in the context of a possible SFPA/Protocol is one of sustainable exploitation of marine resources.

For Angola, the need for sustainability is necessary to:

- Comply with fisheries policy, national legislation, commitments to international agreements (e.g. Article 61/62 UNCLOS), and strategic action plan documents which require sustainable exploitation and management of resources;
- Generate the economic benefits that would result from sustainable exploitation of marine resources for the domestic catching sector, upstream businesses supplying inputs, and downstream processing and marketing activities. Sustainable exploitation is also necessary to ensure that foreign vessels (including the EU) are willing to make payments for access to fish in the Angolan waters, thereby generating revenue for the government.
- Provide social benefits, in terms of the employment related to the economic activities of the upstream, catching and downstream sectors; and
- Contribute to food security. Sustainable resource exploitation can support food security, either directly through ensuring sustainable landings of fish in Angola for consumption in the country, or indirectly by generating revenues and foreign exchange that can be used to pay for imports of cheap fish/protein sources or other food items.

Sustainable exploitation of marine resources, resulting in such economic, social and food security benefits is needed to support the country's National Development Plan, which specifically mentions the fisheries and aquaculture sector as a priority sector.

For the EU, sustainability is needed to comply with and support the objectives of the CFP (Regulation (EU) No 1380/2013) as stated in Articles 2 (objectives) and 3 (principles of good governance), and to comply with Article 28 on external policy and Article 31 on SFPAs. The EU and Angola, as members of regional fisheries bodies (ICCAT and CECAF), also have a need/obligation to work to ensure improved sustainability, given that the objective of these organisations is to promote the sustainable utilization of the living marine resources within the areas of their competence. Articles from Regulation (EU) No 1380/2013 also highlight the need for the EU to contribute towards strengthening of RFMOs. Ensuring sustainability of marine resources requires a SFPA/Protocol, like the previous fisheries agreement, be directed at 'surplus resources'.

Shared needs of both the EU and Angola also include the need for a possible SFPA/Protocol to be concluded in the spirit of fair, transparent and equitable cooperation and respect for human rights and democratic principles, and to aim at sharing benefits fairly between the two parties. An additional shared need is for safeguarding working conditions on board fishing vessels in line with international standards reflected in ILO Conventions i.e. Declaration on Fundamental Principles and Rights at Work and the ILO Convention in the fishing sector (ILO C188).

### *7.1.2 Angola's needs*

Angola's needs from a possible SFPA/Protocol with the EU can be surmised from current policy, legislative and strategy documents for the country, as well as from the consultations undertaken as part of this evaluation (Feb./March 2023); they can be expected to become more fully apparent during the negotiation process, should the Council, following a recommendation from the European Commission, provide an authorization the European Commission, following a respective recommendation, be

authorized to open negotiations. Angola's needs are expected to relate to a) the number of EU vessels and the basis on which they would be allowed access to its fishing zone, and b) needs to implement its national fisheries policy.

The number of industrial (and semi-industrial) vessels that Angola provides fishing authorisations for is currently limited, as per annual Management Measures. Agreement of any fishing opportunities for EU demersal fish trawlers, deep-sea shrimp trawlers and small pelagics trawlers (and smaller RSW vessels) could be dependent on the Government deciding either to i) decrease the number of authorisations presently issued for these fishing types to non-EU foreign fleets because of concerns over resource sustainability or ii) increase the respective TACs and annual number of authorisations only if/when concerns on resource sustainability are overcome, on the basis of updated information on the status of stocks and taking into account the necessary precautionary approach for management.

For tuna, it might be expected that Angola could agree to a similar level of fishing opportunities for EU tuna purse seine vessels as the ones presently used, adding surface longliners willing to operate in the Angolan waters under an SFPA. For non-tuna species, it might be expected that some catches be landed in Angola, and potentially that the total vessel numbers not be increased.

With respect to fishing authorisation fees, current fees as reported earlier in this report (see Table 9) could be considered as representing potential minimum demands by Angola. Earlier text in this report has also provided information on legislative requirements for fishing vessels to access Angola's waters (see section 6.1).

In relation to support to implementation of national sectoral policy through sectoral support funding, needs identified by the Ministry of Fisheries relate to improvement of fisheries research, improvement of MCS, building capacities of staff in various Directorates of the MINPERMAR and at provincial level, support to the development of the marine aquaculture sector, support to the development of small-scale fisheries and community organisations (in particular in terms of security at sea), upgrades to harbor infrastructure and services, improvement of post-harvest quality and value addition, increase of exports to the EU, and support to seamen training applying the SCWF-F standard. The Ministry of Fisheries also highlighted during consultations its wishes to update/upgrade the national fleet[50] and to set up MPAs. Important will be to ensure no duplication, but rather synergy, with other ongoing and planned donor activities and projects (namely a programme for support to the fisheries sector presently being prepared by the EUD, the restructuring of the SNFPA, as mentioned in sections 2.6.1 and 3.5 above). The specific and detailed needs of Angola for sectoral support should thus be assessed before or at the time of negotiation based on further consultations with the Angolan authorities. However, it can be expected that a need would be present in some form for improvements within the fisheries sector.

### *7.1.3 EU needs*

The European Union has made the global fight against IUU fishing one of its main fisheries objectives, notably through the adoption of Regulation (EC) 1005/2008. EU vessels must operate in a manner compliant with regulatory management measures whatever their fishing grounds, with framework mechanisms that allow the EU and the Member States concerned to comply with their obligations as Flag States. The EU therefore needs mechanisms to regulate the activity of European fleets in the waters of coastal States, and in Angola in particular, in accordance with international law and the objectives of the EU's CFP. Furthermore, in this respect Regulation (EU) 2017/2403 on the sustainable management of external fishing fleets[51] established *inter alia* common eligibility criteria for fishing authorisations for external fishing activities, provision of

[50] This would need to take place balancing fleet capacity with available resources

[51] Full title: 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.

information regarding support vessels, and strengthened rules against IUU fishing, which are key implementing pillars of the CFP. A SFPA/Protocol with Angola would provide a clearly defined framework for enhanced monitoring at the EU level of important fisheries policy measures of the Union, in particular in the context of the regional network of SFPAs, EU fisheries development programmes, and participation in regional fisheries organisations for improved governance.

The need of EU tuna vessel operators is to access and / or to continue to have access to the Angolan fishing zone, and be able to operate in ports in good conditions.

The EU purse seine tuna fleet has been operational in the Eastern Atlantic Ocean over many years, with a strong reliance on catches in both the high seas and in EEZs in the region. They have been operating in Angola using direct authorisations.

Fleet owners and EU Member State administrations unanimously support a SFPA/Protocol for tuna with Angola[52], in order to continue having access to Angolan waters (for French and Spanish purse seine fleets) and/or to give access to a new category (Spanish and Portuguese surface longliners).

EU vessel operators would have a need for efficient and rapid issuing of fishing authorisations to enter Angolan EEZ (operators presently fishing in Angola under a direct authorization expressed the view that the process is complicated and takes time, partly due to the various changes in the structure of the fisheries sector in recent years).

With regards to the number of fishing opportunities to be included in policy options to be evaluated, EU operator needs have been identified from consultations to EU member States administrations and EU private operators completed for this evaluation. Data on historical catches has been provided by the European Commission as well.

For tuna vessels, policy options of either a tuna only agreement or a mixed agreement would need to evaluate the option with regards to 20-25 tuna purse seine vessel opportunities (and support vessels) reflecting current numbers operating under direct authorisations in Angola, as well as an additional 6-10 surface longliners.

The views of stakeholders and catches in the waters of Angola by EU vessels in the past years provide an indication of potential needs with regards to tuna reference tonnage under a SFPA/Protocol with Angola. Average tuna catches over the past 4 years by purse seine vessels have been c.a. 4 750 tonnes per year which may reflect their needs; and the needs of EU longliners that are not currently fishing in Angola, may be for an additional 1 000 to 2 000 tonnes a year.

The needs of non-tuna EU vessels for access to the Angolan fishing zone have been clearly expressed through the answers to the evaluation questionnaires, as most member states presently and/or potentially interested answered, as well as most of the consulted Spanish private operators' representatives (no Portuguese operator did).

Some categories of vessels are already present in Angola (i.e. Spanish crustaceans trawlers, Portuguese demersal trawlers), and representatives of other categories expressed a strong interest in fishing in Angolan waters (Spanish cephalopods trawlers, freezer trawlers and Refrigerated Sea Water (RSW) vessels targeting small pelagics from Northern/Eastern Europe).

The needs would most likely be for fishing opportunities for 11 Spanish deep sea shrimp trawlers, 3 Spanish and 3 Portuguese demersal fish trawlers, about 10 large freezer trawlers (from Latvia, Lithuania, Poland, Germany and the Netherlands) and 2-3 RSW trawlers (from Poland) for small pelagics. Strong interest has also been expressed by cephalopod trawler owners (10 vessels from Spain). In total, this would represent about

[52] Questionnaire responses from Spain, France and Portugal

40 vessels, of 5 different categories (of which 2 categories are presently present under direct authorisations)[53].

Table 12 shows the number of EU vessels presently fishing and the number of vessels interested in fishing in Angolan waters, per category of vessel.

**Table 12: Number of EU vessels presently fishing and number of EU vessels interested in fishing in the Angolan waters**

| | | Category | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | **Country** | **Tuna Purse seine** | **Tuna longline** | **Bottom Shrimp** | **Demersal** | **Cephalopods** | **Small pelagics - Large trawlers** | **Small pelagics - RSW** |
| **Presently fishing** | Spain | 10 | 0 | 11 | 4 (*) | 0 | 0 | 0 |
| | Portugal | 0 | 0 | 0 | 1 (3?) | 0 | 0 | 0 |
| | France | 10 | 0? | 0 | 0 | 0 | 0 | 0 |
| **Possible interest (**)** | Spain | 10 **P** | 6-10 **N** | 11 **P** | 3 **N** | 10 **N** | ? **N** | 0 |
| | Portugal | ? | ? | ? | 3 **P** | | | |
| | France | 10 **P** | 0? | 0 | 0 | 0 | 0 | 0 |
| | Northern /Eastern Europe | 0 | 0 | 0 | 0 | 0 | 8-9 (17 max.) **N** | 2 + 1 max. **N** |

(*) until 2021; (**) P: same as present; N: newcomer
Source: Elaboration by the mission, based on the answers from consultation questionnaires

The EU fleets (tuna and non-tuna, present and interested) have a need for security of access that would be achieved through a SFPA/Protocol[54]. Direct fishing authorisations in Angola are presently issued for one year, renewable, but all consulted stakeholders stress the fact that a SFPA would ensure them more security about future access and other benefits, along with less administrative burden involved with applying for fishing authorisations, and foster responsible fishing in the fishing zone. A 5-year period SFPA would be the preference.

In terms of port infrastructure, facilities and services, the needs for all fleets (mostly for those doing transshipment and/or unloading catches) are as follows:

- Improve 'port attractivity'/port infrastructures, facilities and services: improvement/increase of port access conditions, landing facilities (quay lines, crane capacity); provision of efficient port services for unloading of fish and ship chandlery; facilities to export / market fish; secure and transparent (e.g. taxation system) environment to operate; basic services (permanent availability of water and electricity, at an affordable price).
- Development of chill/cold storage certified for export to the EU and possibly creation of and support to small processing companies.

With respect to the potential need by Angola for Angolan crew to work on board EU vessels, EU vessel operators have not expressed opposition to such a requirement[55]. The trawlers presently operating in Angola are de facto using Angolan staff (in general, all crew members excepting the senior officers) and the tuna operators use Angolan or ACP crew. With respect to any requirement by Angola for Angolan observers on EU vessels, this is already stipulated in the LGRM, as any industrial fishing vessel is supposed to accommodate an observer on board. As for scientific observers, tuna vessels already have scientific observers from coastal countries. Angolan nationals could join the current regional observer pool providing they can receive adequate training.

The needs of EU operators with respect to the landing of catches in different countries differ according to the type of fishing operation/vessel/end markets:

[53] Greek stakeholders did not express any interest in expanding their fishing operation (for demersals) further off their present zone in Western Africa, and neither the Irish nor Italian fisheries administration responded to the evaluation questionnaire (probably by lack of potential interest on the part of their respective fleets).
[54] Questionnaire responses: all EU operators' representatives, as well as EU member states administrations
[55] Questionnaire responses: all EU operators' representatives

- Tuna vessels land their catch to existing processing facilities in Western Africa (Abidjan, Tema, Dakar and Mindelo in the case of purse seine; Mindelo, Walvis Bay and Montevideo in the case of longliners) and in the absence of any industry in Angola, would not consider unloading and trading their fish in the country, with the possible exception 'faux-thon' (as in the case of Abidjan and Mahé). In the case of surface longliners, 'tintorera' and other by-catch could possibly be destined to the local market, provided landings facilities are suitable, the landing process is efficiently organised, port charges are competitive, prices paid for fish by local buyers are comparable with prices vessels could obtain if fish were landed elsewhere, and there is no competition with artisanal fisheries.
- Bottom shrimp vessels freeze all their catches on board and export all of them to the EU, after transshipment of the cargo or unloading it into containers at quay. By catch only represent a minimal portion of their catch and is consumed by the crew.
- Demersal trawlers freeze all their catches on board and sell part of it on the local market (those species less valued on the European export markets). The same requirements as above would need to be fulfilled.
- Cephalopods are allowed a certain proportion of by-catch, which could possibly be traded in Angola (under the same requirements as above).
- Likewise, the catches of large pelagic freezer trawlers are mostly destined for local and regional markets. Those EU operators potentially interested in fishing in Angola would therefore be willing to land part of their catch for sale on the local market. It is reminded that horse mackerel ('carapau') is traditionally in very high demand in Angola (protein at an affordable price for low-medium range consumers) and its production at national level is incentivized/prioritized by the authorities (limitation of import and prohibition of export).

EU tuna processors have needs in terms of raw material products, which would be partially met by the inclusion of fishing opportunities in a future SFPA/Protocol between the EU and Angola, because product caught in Angolan waters could potentially be sold to EU processors even though much would be expected to be processed in West-African countries (Côte d'Ivoire, Ghana, Senegal). This processing of fish caught in Angola in this case would result in economic (value-added), and social (employment) benefits in the EU.

EU consumers also have a need for fish, to which a SFPA/Protocol between the EU and Angola would contribute (along with other SFPAs in the region) with part of the fish caught by the EU fleet destined for the EU market (in various proportion, according to the type of target species: nearly all in the case of bottom shrimp trawlers, a limited % in the case of demersal fish; small pelagics do not have a market in the EU). Given rising populations in the EU, and expected continuing demand in the EU for fish, the need for EU consumers is the continued flow of fish to the EU market.

### 7.2 The added value of EU involvement in an SFPA/Protocol

There is clear added value of EU/DG MARE involvement in a SFPA/Protocol from the financial contribution for sectoral support funding and the financial contribution for access to fisheries resources. These financial contributions could be used to complement sector interventions by the EU and other donors, support national policy and sectoral strategy, and improve sectoral management in Angola. Added value would also be created by the platform created for sectoral policy dialogue in coherence with sectoral support provided under other SFPAs in the region.

Added value from a SFPA/Protocol would be derived from the EU having an instrument enabling it to better implement its sectoral policy at sub-regional level through the leverage effect provided by a network of agreements and its interventions within ICCAT.

A SFPA would contribute to strengthening the role of the EU in the region as a fishing player and as a market state and as regards compliance, control and surveillance. Having an SFPA/Protocol would add value by providing a legal mandate to monitor at the EU

level EU fishing vessel activities in the Angolan fishing zone (vessels would be required to report on their activities to the EU and the EU would be more likely to be directly involved in cases involving any allegations of infringements of regulations by EU vessels). The EU's role in ICCAT, and potentially CECAF and ATLAFCO/COMHAFAT would be strengthened if it were representing EU vessels fishing in Angolan waters under a SFPA/Protocol, rather than such vessels fishing under private access agreements negotiated by vessel representative organisations.

### 7.3 Objective setting

The general and specific objectives of having an SFPA/Protocol between the EU and Angola, as proposed below, stem from those specified in the terms of reference for this evaluation, the needs assessment (section 7.1), the requirements of the CFP (Regulation (EU) No 1380/2013 of the European Parliament and of the Council), Council Regulation (EC) No 1005/2008 (the 'IUU Regulation'), and Regulation (EU) 2017/2403 on the sustainable management of external fishing fleets, and Sustainable Development Goal 14 which is to 'conserve and sustainably use the oceans, seas and marine resources for sustainable development', as well as Sustainable Development Goal 12 which is to 'ensure sustainable consumption and production patterns' and their targets. The objectives also stem from the need to support economic and social development in the country.

General objectives

1. Resource conservation and environmental sustainability ensured through rational and sustainable exploitation of Angola's living marine resources.
2. Protection provided for the financial viability of the EU fishing fleet operating in the Eastern Atlantic Ocean, and for the employment linked to fleet activities both in the EU and in Angola.
3. A sustainable fisheries sector developed in Angola, and Angola integrated into the global economy.

Specific objectives

*In support of general objective 1*

1. Scientific and technical knowledge of the fisheries resources improved through cooperation between the EU and Angola.
2. Coherence and compliance with the conservation and management measures of Angola, ICCAT and other regional fisheries organisations, and IUU fishing combatted through the strengthening of Angola's MCS capacities.
3. Access facilitated for the EU fishing fleet (including support vessels) to Angolan's waters to exploit highly migratory species and 'surplus' resources, as identified in a clear and transparent manner on the basis of the best available scientific advice and relevant information, and taking into account scientific assessments conducted at the regional level, as well as any national and regional conservation and management measures.
4. The same principles and standards for fisheries management promoted in Angola as applied in EU waters.

*In support of general objective 2*

1. The level of fees payable by EU vessel owners for their fishing activities is fair, non-discriminatory and commensurate to the benefits provided through the access conditions, there is no discriminatory treatment towards EU vessels, and a level playing field promoted among the different fleets operating in Angola.
2. Security of access provided for EU vessels to fish in Angolan waters.
3. The interests of the EU's outermost regions are taken into account (if any).
4. A continued supply of fish is ensured for the EU, for Angola, and for other markets.

*In support of general objective 3*

1. Capacity is built in Angola for sustainable resource conservation.
2. The employment of seamen and observers from Angola, or more generally in ACP countries, is promoted, where possible and suitable based on principles consistent with ILO Principles[56] and other SFPA/Protocols in force.
3. EU fishing vessels are not operating in Angolan waters once/if a SFPA/Protocol is in force unless they are in possession of a fishing authorisation issued in accordance with an agreed procedure (the 'exclusivity' principle).

## 7.4 The 3 policy options available

### *7.4.1 Introduction*

Based on the above data and findings to date, as well as the Terms of Reference for the assignment and discussions which took place during the kick-off and inception meetings, the ex-ante evaluation consider the following three policy options, which are subjected to the appropriate evaluation questions and criteria.

- **Option 1 'No SFPA/Protocol'**. Under this option EU vessels, as is presently the case, would be free to sign private access arrangements or 'direct authorisations';
- **Option 2 'A tuna SFPA/Protocol'**. This option would provide fishing opportunities for tuna and tuna-like species, for both purse seine and longline vessels;
- **Option 3 'A mixed species SFPA/Protocol'**. This option would provide fishing opportunities for tuna and tuna-like species, as well as for shrimp/demersal fish/cephalopods.

The text below lays out what would be involved with each of Options 1-3 ('No SFPA/Protocol', 'A tuna SFPA/Protocol', and 'A mixed species SFPA/Protocol', so that subsequent text can evaluate the options with a clear idea in mind of the situation represented by each option. It is not appropriate for this ex-ante evaluation to specify or propose precise detail that might be the subject of negotiation between the two parties, and the description of the options below is therefore intended only to provide enough detail/specification to enable the evaluation of their respective results/impacts (see section 7.6).

### *7.4.2 Option 1 - No SFPA/protocol*

With no SFPA/Protocol, the current situation would prevail, leaving EU vessel owners or their representative organisations free to negotiate direct authorisations to fish in Angolan waters.

The Option assumes that they would do so and that:

- 20-25 tuna purse seine vessels (with support vessels), 11 shrimp trawlers, and 3 demersal fish trawlers currently taking up authorisations would continue fishing in Angola under direct authorisations;
- Other EU vessel owners or 'newcomers' which may have an interest in fishing in Angola i.e. tuna longliners, cephalopods trawlers, large trawlers and RSW for small pelagics, would not however apply for and be provided with fishing opportunities;
- In line with Section 3 of Regulation (EU) 2017/2403 on the sustainable management of external fishing fleets, flag Member States would only provide operators with an authorisation if they complied with requirements such as having provided: i) a copy of or an exact reference to the applicable fisheries legislation;

[56] Two key Conventions are: ILO C188 and the STCW-F http://www.ilo.org/dyn/normlex/fr/f?p=NORMLEXPUB:12001:0::NO:::

ii) a scientific evaluation[57] demonstrating the sustainability of the planned fishing operations; and iii) a designated official, public bank account number for the payment of all the fees.

- Access costs would be based on vessel fishing authorisation fees and royalties based on current legislation in Angola;
- There would be a requirement to employ Angolan crew and observers in line with current legislation (i.e. a minimum of 75 % of the crew);
- Based on the current legislation, any foreign fishing operator willing to fish in Angolan waters is required to enter into an 'comparticipation association' with an Angolan partner holder of a fishing right issued by the MINPERMAR;
- No Joint Committee would be established to monitor or evaluate the access granted, and to enable the strengthening of the cooperation between the EU and Angola in the fishery sector;
- Financial contributions would be made only by EU vessel owners, not by the EU; and
- Financial contributions would only be for access not for fisheries sector policy support.

### *7.4.3 Option 2 - SFPA and protocol for tuna and tuna-like species*

Option 2 is specified based on the text on needs and lessons learned provided in sections 7.1 and 7.3, as follows:

- The SFPA/Protocol to provide access to EU vessels for highly migratory species;
- Fishing opportunities provided for 20-25 purse seine vessels (with support vessels) currently operating in Angolan waters, and 6-10 tuna longliners (newcomers) which have expressed an interest in access;
- No fishing opportunities for other species would be provided (hence, those EU vessels presently fishing for shrimp and demersal species would no longer have access to the Angolan waters, as they could not proceed with direct authorisations while an SFPA exists due to the exclusivity clause);
- A Protocol lasting for an initial period of around 5-6 years;
- Access costs to be based on vessel fishing authorisation fees (EUR/tonne of fish caught for shipowners) and a minimum reference tonnage of around 5 000 to 7 000 tonnes per year,[58] with guaranteed payments per tonne for catches over the reference tonnage;
- Shipowner fees to be aligned with other SFPAs/Protocols in the region;
- A Joint Committee made up of representatives of both parties to meet regularly to monitor the implementation and impacts of the SFPA/Protocol;
- A Joint Scientific Committee to monitor the EU fishing activities and enable sharing of research findings on non-tuna fishing activities, applying as much as possible an ecosystem approach and, then providing scientific findings to the Joint Committee, ensuring sustainable fishing activities of the EU fleet;
- Financial contributions to be made by both the EU and EU vessel owners for catching vessels but only by vessel owners for supply vessels;
- A requirement for EU vessels to employ local or ACP fishing crew based on ILO principles in line with the ILO Conventions ratified by the flag States (e.g. ILO C188 ratified by France and Spain);
- A requirement for EU vessels to employ local observers upon request by the Angolan authorities;

[57] The Regulation requires that the scientific evaluation referred to is provided by an RFMO or by a regional fisheries body with scientific competence or is provided by, or in cooperation with, the third country.

[58] Average tuna catches over the past 4 years by purse seine vessels have been c.a. 4 750 tonnes per year; the reference tonnage is larger due to the operation of EU longliners under this option, not currently fishing in Angola.

- No requirement for EU fishing vessels to land catch in Angola (although vessels might be incentivised to do so);
- Sectoral support funding to be used for implementation of Angola's fisheries policy.

### *7.4.4 Option 3 - SFPA and protocol for a mixed agreement*

This Option is based on i) the existing information on the stock status of the different species or group of species, ii) the respective management measures implemented by the MINPERMAR in terms of TACs and maximum number of authorisations.

- In summary: no additional opportunities for shrimp and demersal fishing (for which EU vessels already have access at present), but opportunities for cephalopod authorisations (for which EU vessels do not currently have access).
- The SFPA/Protocol to provide access to EU vessels for tuna and tuna-like species, and for shrimp, demersal fish, and cephalopods,;
- Fishing opportunities provided for the tuna fleet foreseen as per Option 2, but with additional authorisations for 11 bottom shrimp trawlers (i.e. the present number of EU vessels[59]), 3 demersal fish trawlers (the present number of EU vessels)[60], and 3-4 cephalopods trawlers[61],[62].
- A Protocol lasting for an initial period of around 5-6 years;
- Access costs to be based on vessel fishing authorisation fees except for tuna, and a minimum reference tonnage for tuna of around 5 000 to 7 000 tonnes per year[63] with guaranteed payments per tonne for catches over the reference tonnage;
- Shipowner fees to be aligned with other SFPAs/Protocols in the region;
- The current legislation is updated, so that shipowners are not obliged to enter into an 'comparticipation association' with an Angolan partner holder of a fishing right issued by the MINPERMAR;
- All products exported from EU-flagged vessels to the EU are considered as EU products, as under the present situation;
- A Joint Committee made up of representatives of both parties to meet regularly to monitor the implementation and impacts of the SFPA/Protocol;
- Financial contributions to be made by both the EU and EU vessel owners for catching vessels but only by vessel owners for supply vessels;
- A requirement for EU vessels to employ local or ACP fishing crew based on ILO principles in line with the ILO Conventions ratified by the flag States (e.g. ILO C188 ratified by France and Spain);
- A requirement for EU vessels to employ local observers upon request by the Angolan authorities;
- No requirement for EU fishing vessels to land catch in Angola (although vessels, in particular demersal and cephalopods trawlers might be incentivised to do so – demersal trawlers already sell locally at present);
- Sectoral support funding to be used for implementation of Angola's fisheries policy.

[59] According to Table 1, the maximum number of authorisations for 2023 is 25 (of which 11 are taken up by EU vessels); the DNP informed states that the fishing opportunities are already taken up by 100 %, stocks are probably fully to over-exploited, hence there is no possibility for increases in the number of total authorisations.
[60] The maximum number of authorisations for 2023 is 38 (of which 3 are taken up by EU vessels); like for shrimp, the DNP informed that the fishing opportunities are already taken up by 100 %, stocks of some of the main species are probably fully to over-exploited, hence there is no possibility for increases in the number of total authorisations.
[61] The maximum number of authorisations for 2023 is 4 (presently no EU vessels); the DNP informed that the fishing opportunities are taken up only by 40%, the stocks are probably moderately to fully exploited, hence there are some opportunities for cephalopod fishing (newcomers).
[62] There are some fishing opportunities for gillnet industrial fishing (see Table 1) but no EU fleet has indicated any interest for this type of fishing in Angola.
[63] Average tuna catches over the past 4 years have been c.a. 4 750 tonnes per year; the reference tonnage is increased due to the operation of EU longliners, not currently fishing in Angola

## 7.5 The results and impacts expected

The discussion below considers the extent to which Options 1-3 would meet the needs of stakeholders and generate results favourable to them. As presented earlier, some of these needs and expected results are shared, some are specific to the EU, and some are specific to Angola. The risks are also considered, along with potential mitigation measures, before a short summary/conclusion identifies the preferred option.

### *7.5.1 Results and impacts shared by the EU and Angola*

All three Options would respond to the needs under Regulation (EU) 2017/2403.

Under Option 1, the requirements on flag Member States under Regulation (EU) 2017/2403 would provide some but rather limited safeguards over the shared need of resource conservation and environmental sustainability. Option 2 and Option 3 could also be expected to result in the shared need of resource conservation and environmental sustainability as included in general and specific objectives. However the contribution to sustainability would likely be greater under Option 2 and Option 3 than Option 1, as the granting of access would take place within a framework guided and managed jointly by the EU and Angola, overseen by a Joint Committee, and coupled with the specific financial contribution provided for sectoral support. Financial contributions for sectoral support provided under a SFPA/Protocol would be specifically earmarked for management improvements supporting enhanced conservation and sustainability. While it might at first appear that Option 2 would provide for greater sustainability that Option 1 or 3 because of the exclusion of opportunities for non-tuna vessels, this would probably not be the case because the Angolan authorities would be likely to issue such opportunities/authorisations to other foreign vessels.

While Option 3 would also provide access under similar arrangements to Option 2 rather than under direct authorisations for tuna fleets, Option 3 would support the shared need for resource conservation because of the access cautiously granted to trawlers under this Option, given the current status of shrimp and demersal fish stocks (probably fully exploited) and of cephalopods (probably moderately exploited) in Angola.

In the longer term, the environmental performance under Option 2 or Option 3 could be expected to result in the best and most improved economic and social impacts for both the EU and Angola, because sustainable management of stocks provides the basis for, and underpins, economic and social benefits from fish catches.

### *7.5.2 Results and impacts to the EU*

All three Options would result in value-addition and employment in: i) the EU catching sector, ii) upstream EU-based supply businesses providing goods and services to EU vessels, iii) downstream EU-based processing based on the flow of catches from Angola to EU processors; iv) supplies of product to EU consumers.

Option 2 may result in lower upstream and downstream benefits in the EU than Options 1 and 3 as fewer fishing opportunities would be provided (i.e. for tuna only) than at present (under option 1) or under option 3. Option 3 would increase benefits to the EU private sector over option 1 and 2 due to the activity of more vessels.

A key benefit of Options 2 and 3 over Option 1 would be the increased security of access that would be provided for EU vessel owners under a SFPA/Protocol, and the fact that the EU would negotiate access on their behalf. In addition, among the benefits of Options 2 and 3 are the positive impetus for the broader bilateral relations between the EU and Angola, as well as a strengthened role of the EU and Angola in ICCAT and other regional organisations. Although Option 3 could jeopardise these relations if partners in organisations with responsibility for demersal stocks (e.g. CECAF) viewed the EU's actions in signing a mixed species agreement as being counter to sustainability objectives.

Finally, with respect to EU results, Option 1 would be characterised by different sources of funding compared to Options 2 and 3. Under Option 1, all funding for access would come from EU vessel owners (as in the present situation, under direct authorisations), and none from the EU. This would mean a reduced requirement to use EU funds under Option 1, and most likely, higher costs for EU vessel owners than with an SFPA.

### *7.5.3 Results and impacts to Angola*

The exact financial impacts and benefits to Angola resulting from the three Options cannot be measured at the current time (but would be subject of an ex-post evaluation) as it is not known prior to negotiations what any reference tonnage would be for tuna species, what financial contributions for access would cost for shrimp/demersal/cephalopods, the price agreed for catches, and the actual uptake of fishing vessel authorisations and catches made.

However, in relative terms, Options 1 and 3 could potentially generate greater financial contributions for access than Option 2, and greater levels of onboard employment for Angolan crew and observers, given the exclusion of trawlers from Option 2.

Option 1 and more particularly Option 3 (since it involves a larger number of EU vessels) could also potentially generate some downstream processing and marketing value added and employment in Angola from industrial vessel activity based on catch/bycatch from demersal fishing vessels landed in Angola.

Both Options 2 and 3 would provide additional financial contributions from the EU for sectoral support that would not be present under Option 1.

Benefits to Angola in terms of improved capacity for fisheries management and conservation would result from the sectoral support provided under Options 2 and 3 and would represent a primary benefit to Angola, compared to Option 1.

The fact that option 2 only provides for EU tuna vessels might be thought to provide benefits to Angolan catching and downstream sectors and coastal communities, however this would only be the case if the Angolan authorities did not allocate authorisations to other foreign vessels instead of the EU vessels provided for under Options 1 and 3, which seems unlikely.

### *7.5.4 Risks and mitigating measures*

This section of the evaluation considers the risks involved in the implementation of the intervention and countermeasures that could be proposed.

There is a risk under Options 2 and 3 that EU vessels do not utilise the fishing opportunities provided, resulting in poor value for money in the use of EU funds. To mitigate this risk a SFPA/Protocol could be structured with an appropriate reference tonnage for tuna species, and with fishing opportunities for an appropriate number of vessels. Demand by purse seine tuna, bottom shrimp and demersal vessels would appear more certain than for tuna longliners and cephalopod vessels given historical and present patterns of fishing.

There is a risk of negotiations not starting or breaking down despite the stated interest in a SFPA/Protocol by both the EU and Angola, given potentially different views as to the precise content of the Protocol. Mitigating this risk is dependent on negotiations being foreseen then conducted in good faith. Also crucially important in mitigating this risk would be the transparent sharing of information and additional information on stock status that may be available at the time of negotiation.

A failure by parties to agree on the content of the sectoral support matrix, given different views about priority objectives and needs, is also a risk. However, this risk is not considered a major one, and the content of this report and background information provided on current donor assistance and government policy should serve to mitigate any such risk. It can also be observed that both Angola and the EU have many shared needs,

as already highlighted, which should mean that the sectoral support matrix could be agreed without difficulty.

A failure by the Joint Committee to adequately monitor the implementation of the SFPA/Protocol so as to achieve both its overall objectives as specified above, and the detailed arrangements and agreements contained within the SFPA/Protocol, is a risk that should be mitigated by ensuring that the Joint Committee meetings are held as scheduled, and by any future ex-post evaluations carefully reviewing the functioning of the Joint Committee.

All three Options also have inherent risks with regard to uncertainty over fish prices, and the impact such price fluctuation might have on achieving 'fair and mutual benefits'. Any rise or fall in prices (assuming constant costs of fishing) would mean that the value-added made by EU vessels would fall or rise. This risk, which is inherent due to fluctuating international market prices, is more marked under Options 2 and 3 given that prices would be most likely negotiated for the duration of the Protocol. Under Option 1, financial contributions for access would be the subject of short-term (one year) direct authorisations to fish, the fees for which could be adjusted by the Government.

Option 3 poses risks in relation to the exploitation of fish stocks in the region, due to the new presence of EU tuna longliners and EU trawlers fishing for cephalopods (as compared to the present situation of Option 1). This risk is mitigated by ensuring that EU authorisations do not result in an increase in total foreign vessels numbers in Angola, except for cephalopod trawlers as cephalopod stocks show room for carefully managed increases in fishing.

Finally, the additional risks of Option 1 are the benefits of Options 2 and 3 i.e.:

- No sectoral support funding, potentially jeopardising the realisation of the objectives;
- Reduced legal certainty and security of rights for vessel owners (because a Protocol is assumed for more than one year, while access rights under direct authorisations are for one year renewable); and
- No strengthened role of the EU within ICCAT and other regional organisations (e.g. CECAF), vs. a SFPA/Protocol which would contribute to strengthening the role of the EU in the region.

### *7.5.5 Conclusion and summary regarding the three options*

The preceding text, as summarised in Table 13 below, suggests that Option 3 is the preferred Option. The overall objective of sustainable exploitation would be achieved under this Option assuming the risks of over resource exploitation are mitigated, as demonstrated by the Angolan authorities prior to signature of a SFPA/Protocol and through monitoring by the Joint Committee during any future SFPA/Protocol, providing the basis for long-term economic and social benefits for both parties.

Option 3 is preferable to Option 2, because of the additional benefits it would provide to Angola in terms of financial contributions for access, and potentially greater levels of sectoral support than Option 2. Option 3 would also provide economic and social benefits to the EU fleet that would be greater than Option 2 because of the additional vessels included.

Option 3 would also provide for a strengthening of the bilateral relations between the EU and Angola, as well as a strengthened role of the EU and Angola in ICCAT and other regional organisations. Ensuring that access provided to EU vessels is based on SFPAs/Protocols rather than direct authorisations is also consistent with the long-term thinking of the EU that SFPAs/Protocols are preferable to direct authorisations signed by Member State fleets, because of the different results that are likely to occur from the two methods of access.

**Table 13: Summary comparison of key benefits/costs/risks of policy options evaluated**

| Option 1 (No SFPA/Protocol) | Option 2 (A tuna SFPA/Protocol) | Option 3 (A mixed species SFPA/Protocol) |
|---|---|---|
| Support for sustainability objectives – **medium**: some safeguards under Regulation (EU) 2017/2403 but no sectoral support funding or joint committee monitoring | Support for sustainability objectives – **high/medium**: through the content of SFPA/Protocol/Annex text and financial contributions for sectoral support funding. Medium on non-tuna stocks as no net change in total foreign vessel numbers but no Joint Scientific Committee reviewing status of non-tuna stocks | Support for sustainability objectives – **high/medium** given current information about status of non-tuna stocks but precautionary nature of opportunities provided, but high through the content of SFPA/Protocol/Annex text and financial contributions for sectoral support funding, and involvement of Joint Scientific Committee |
| Relevance to needs – **low**: would not meet needs of sectoral support or stated needs of all parties for a SFPA/Protocol (although could meet needs of EU vessel owners for access but under sub-optimal conditions) | Relevance to needs –**low-medium**: low on needs of operators for access as only tuna, low on increased supplied to the EU market, medium on increased security of network of fishing opportunities for EU fleet (tuna only), medium on sectoral support responding to relevant sectoral needs | Relevance to needs – **high/medium.** High on needs of operators for access, increased security of network of fishing opportunities for EU fleet, EU market supplies, and sectoral support responding to relevant sectoral needs. High on needs of Angola for access fees. Medium from possible impacts on domestic fisheries |
| Effectiveness – **low/medium**: yearly negotiation process flexible/adaptive to changes in fish prices and rates of utilisation, but risk of failing to agree the basis for access and lower security of access provided to vessels. Medium effectiveness in sustainability likely, and low likelihood of any improvements in sectoral management. Low likelihood of meeting stated objectives | Effectiveness – **high**: a multi-year protocol providing good security of rights for vessels. High likelihood of effective sustainability and effective improvements in sectoral management. High likelihood of meeting stated objectives | Effectiveness – **high/medium**: High from a multi-year protocol providing good security of rights for vessels. Medium likelihood of effective sustainability due to risks (but mitigated through no overall increase in foreign effort for 'at-risk' stocks), and high for effective improvements in sectoral management. High likelihood of meeting stated objectives |
| Efficiency – **n/a** No use of EU budget in this case | Efficiency – **unclear** without economic/financial modelling and with financial contributions not known. | Efficiency – **unclear** without economic/financial modelling and with financial contributions not known. |
| Coherence – **low**: between CFP and cooperation policy | Coherence – **high**: between CFP and cooperation policy | Coherence – **high**: between CFP and cooperation policy |
| Risks – EU vessels owners not granted access by Angola and threat to regional network of fishing opportunities (for tuna in particular) | Risks –disagreement over sectoral support matrix, low utilisation, weak monitoring of the SFPA/Protocol by the Joint Committee. Low efficiency for the EU if there is low utilisation of fishing opportunities | Risks –disagreement over sectoral support matrix, low utilisation, weak monitoring of the SFPA/Protocol by the Joint Committee. Low efficiency for the EU if there is low utilisation of fishing opportunities |

Source: consultants' compilation

### 7.6 The internal coherence of the proposed programme or activity and its relations with other relevant instruments

Sectoral support funding provided would ensure that the proposed SFPA/Protocol would be complementary to and coherent with other interventions when coupled with further co-ordination of funding with existing interventions. This would provide synergies with other recent and ongoing interventions while ensuring that financial contributions for sectoral support under a SFPA/Protocol were not duplicating the activities/funding provided by other interventions. The sectoral support matrix would ensure that the SFPA/Protocol is fully coherent with the national fisheries sectoral policy in Angola.

A SFPA/Protocol, through its support from sectoral funding to help Angola comply with its ICCAT obligations would also ensure that the intervention is complementary to initiatives taking place at the regional level; this is important given the regional and shared nature of the tuna fisheries in the Eastern Atlantic ocean.

The SFPA/Protocol would be fully coherent with the CFP (and its reform), with Regulation (EU) 2017/2403 on the sustainable management of external fishing fleets, with ICCAT arrangements, and with the EU's international obligations.

### 7.7 The volume of EU appropriations, human resources and other administrative expenditure to be allocated

Having a SFPA/Protocol would have a number of implications in terms of the volume of appropriations from the EU budget, and the human resources and other administrative expenditure to be allocated.

Appropriations from the EU budget would be determined by levels of financial contribution to be paid by the EU to Angola for access and sectoral support. The exact amounts involved cannot be estimated at this stage and would depend on:

- The reference tonnages for each type of fishing/group of species included in the SFPA/Protocol;
- The reference prices agreed for the catches;
- The actual utilisation of the SFPA/Protocol; and
- The relative contributions to be made by a) the EU and b) EU vessel owners.

Additional implications for the EU budget would relate to the human resources required by the EU for negotiation and monitoring of the SFPA/Protocol. These would arise from the following two requirements, but would have to be fulfilled within the existing DG MARE and EUD staffing and budgetary ceilings:[64]

- Participation by DG MARE staff in negotiations (staff time and operational costs, for example travel);
- Participation by DG MARE staff and the EUD in Angola in Joint Committee meetings; and
- DG MARE and EUD in Angola staff time associated with fishing authorisations, data collection/management, financial management, and ongoing monitoring of the SFPA/Protocol.

Finally, there could be some potential staff and operational costs in some Member States administrations (namely Spanish, Portuguese and French for tuna and shrimp/demersal/cephalopods fishing) in negotiating, monitoring and overseeing the activities of Member State vessels. Existing staff in institutions would be expected to be involved i.e. these responsibilities would not require the hiring of new staff or additional staff costs. However, some additional operational budgets might be required to attend meetings.

[64] Having a SFPA/Protocol would also result in some likely costs for Angola in terms of staff time and any operational costs associated with the involvement of government personnel with monitoring the implementation of the SFPA/Protocol and participating in Joint Committee meetings. But it is assumed that such responsibilities would be taken on by existing staff and covered within existing operational budgets.

Because the exact costs of a SFPA/Protocol cannot be estimated at this time for the reasons stated above, it cannot be determined whether the benefits and longer-term impacts of the intervention justify the costs of it. In addition, the terms of reference for this evaluation do not require a full cost/benefit analysis of a possible SFPA/Protocol between the EU and Angola. However, this evaluation has presented both the expected results/impacts of the intervention and the added value of EU involvement, which together represent the benefits and long-term impacts.

### 7.8 Lessons learned from the past

Lessons can be used to improve any future SFPA/Protocol between the EU and Angola. The lessons provided below inform this evaluation, and are documented to provide relevant information to those involved with the negotiation process, should aan authorisationa.the Commission be authorized to open negotiations..

**The previous fisheries agreement**

The last fisheries agreement between the EU and Angola was denounced in 2006, after it had been in force between 1989 and 2004. Documented lessons learned from this previous agreement are not publicly available[65], but the number of EU vessels (mainly from Spain and Portugal) which operated under the old agreement, some of which have continued to do so on the basis of direct authorisations, indicate that the agreement addressed the needs of EU fleet owners for access. Additional information provided earlier in section 6.1.1 and 6.1.2 also highlighted that the 2004 Angolan legislation was a key factor in the decision by the EU to denounce the agreement, suggesting a future SFPA/Protocol could require changes to the Angolan legislation, which remains in force.

The conditions of the previous agreement in terms of fishing opportunities and access fees for vessels are summarized in Table 14 below for the 03/05/1999 – 02/05/2000 Protocol, and indicate EU fleet needs for a wide variety of species.

**Table 14: Conditions of the 1999 – 2000 EU-Angola Protocol in terms of fishing opportunities and access fees**

| Group of species / Fishing gear | GRT per month | No. vessels | Fee | Obs. |
|---|---|---|---|---|
| Crustaceans | 6 550 | 22 | 56 Euros per GRT / month | 5 000 t shrimp (70%) and prawn (30%) /year |
| Demersal fish | 2 000 | NA | 195 Euros per GRT / month | |
| Tuna purse seine | NA | 18 | 20 Euros / t | |
| Tuna surface longliner | NA | 25 | 20 Euros / t | |
| Small pelagics | | 2 | 2 Euros / t | on trial basis |
| Cephalopods | NA | NA | NA | |
| Bottom longliners (fixed gillnets) | 1 750 | NA | | |

The financial contribution was as follows: direct EU contribution: EUR 10.3 million (1 year); Support to IIP (previous INIP): EUR 1.7 million (1 year); Scientific studies and fishery surveys: EUR 0.35 million (1 year).

[65] The 2005 proposal to denounce the agreement states that 'An ex-post evaluation of the last protocol and an impact assessment of a new agreement between the Community and Angola have been drawn up by an outside consultant'. This evaluation was not accessible for the present ex-ante evaluation.

**Negotiating SFPAs/Protocols**

SFPAs/Protocols in the region have been successfully concluded in recent years. The lesson to be learned is that special efforts should be made by both parties to ensure that their respective positions are clearly understood through fair and transparent negotiations (as required by the Basic Regulation on the CFP) so that compromise and common ground can be found. The aspect of transparency needs special attention and should be specifically enshrined in any future SFPA. Recent uptake of fishing opportunities and catches under SFPA/Protocols (as analysed through ex-post evaluations carried out e.g. for Guinea-Bissau, Liberia, Mauritania, Morocco) provide important lessons for both the number of fishing opportunities that might be appropriate for a SFPA/Protocol with Angola, and potential reference tonnages.

**Potential interest by EU vessels in a SFPA/Protocl**

The EU fleet's geographical focus of activities in the past in the Atlantic Ocean suggests that a potential SFPA/Protocol between the EU and Angola is quite important for tuna purse seine vessels (not for pole and line vessels), and possibly of some importance for tuna longline vessels wishing to diversify their operational zone. Historical levels of EU vessel activity in Angola under direct authorisations also indicate a strong interest and demand from EU shrimp/demersal fish trawlers. In addition, interest has been expressed by operators of large freezer vessels (and to a lesser extent, RSW vessels) for small pelagics aiming at diversifying their geographic operations, in search of new fishing grounds complementary to those they have access to through on-going SFPAs. However the status of small pelagic stocks is of particular concern. Spain has traditionally fished for cephalopods and has expressed an interest in operating in Angola.

**Overall benefits of SFPAs to the EU and third countries**

EU vessel activity in the Atlantic Ocean under other SFPAs in the region has generated significant benefits to both the EU and third countries in terms of value addition and employment in the upstream, catching and downstream processing/marketing sectors, as well as contributing supplies to the EU market.[66] SFPAs/Protocols funds to support the implementation of fisheries policy and sustainable fisheries in the region and the earmarking of funds for such purposes is one of the principal benefits of SFPAs/Protocols, and the added value of an EU framework for access, rather than leaving EU Member States to negotiate direct authorisations.[67] Evaluations of other SFPAs/Protocols also suggest that vessel owners may prefer to employ ACP crew on vessels based on available qualifications rather than necessarily crew from the third country with which the EU has a SFPA, and that obligations to land product in the third country with which the EU has a SFPA are generally not favoured by EU vessel owners unless onshore facilities, services and costs make commercial sense. In the case of Angola, landings by EU demersal trawlers are indeed already taking place (without being compulsory).

Increasing landings by EU fleets does not necessarily benefit third countries. It is in particular important that they do not compete with artisanal fish landings in domestic markets. If 'faux-thon' is to be landed by tuna fleets, the issue needs to be well taken into account by both the partner country and the shipowners, in order to ensure transparency in the transactions.

It is key that the flag state ensures that landings and transshipments are monitored. Transshipments have proven to increase the risk of IUU-caught fish being laundered and can increase risks of human trafficking, forced labour and other human rights abuses, therefore the implementation of measures to allow their full and effective monitoring is crucial.

The duration of Protocols to SFPAs in the Atlantic varies.[68] Both EU private sector representatives and EU Member States administrations requirements for a better business environment advocate for 5 or 6-year Protocols. The multi-annual nature of

[66] As shown in numerous ex-post evaluations of SFPAs/Protocols in the region
[67] https://ec.europa.eu/fisheries/cfp/international/agreements/ and ex-post evaluations of recent SFPAs/Protocols
[68] http://ec.europa.eu/fisheries/cfp/international/agreements/

Protocols allows EU fishing companies to better plan their fishing strategies and for third countries to have a better budget visibility and implement the multiannual sectoral programme. Experience indicates that the longer the period of a multi-year Protocol, the more effective it may be. It may therefore be sensible for a Protocol to any SFPA with Angola to be 5-6 years.

**Effectiveness of sectoral support**

The sectoral support component should be designed, planned, implemented and monitored with engagement of all relevant actors in the fisheries sector (including civil society organisations), so it can efficiently contribute to creating the conditions that bring about improved benefits of the SFPA. Sectoral support matrices are not always specified and agreed during the first Joint Committee meeting such that targets and indicators are specific, measurable, agreed, realistic and timebound (SMART).

With regards to use of sectoral support funds, lessons from other SFPAs and donor assistance more generally in the region, suggest that care should be taken in setting the level of any sectoral support funding such that the Ministry of Fisheries does not struggle to fully utilise and benefit from the sectoral support funding due to absorption capacity, especially in light of donor projects in the sector that may be ongoing at the time of the Protocol, and of staff capacity to implement and monitor the sectoral support.

## 7.9 Planning and future monitoring and evaluation for implementation for the preferred option

The appropriate method of planning and implementation of the preferred option (to have a mixed species SFPA/Protocol with shrimp/demersal/cephalopods component with limited experimental fishing for small pelagics) relates to i) procedural steps that must be taken, and ii) future monitoring and evaluation.

In terms of process, for the process to negotiate a SFPA/Protocol to be launched the European Commission must first be authorised by the Council to open negotiations on a SFPA/Protocol with Angola on behalf of the EU following a respective recommendation by the Commission. The European Commission and Angola should then prepare for, and complete negotiations regarding the detailed content of the SFPA/Protocol. The content of the SFPA/Protocol would need to be approved by Angola's government.[69] The Council would adopt a decision authorising the signing of the agreement and, if necessary, its provisional application before entry into force under Article 218 (5) TFEU, with entry into force taking place after obtaining the consent of the European Parliament under the procedure set out in Article 218 (6) TFEU.

With respect to monitoring and evaluation, the most appropriate method of planning and implementation would be for:

- Involvement of all actors (in particular the civil society) in the whole process;
- Specification of a logframe for the intervention with associated indicators, and means of verification, which could be used in any ex-post evaluation;
- The EU and Angola to jointly agree on a sectoral support matrix (it is not the role of this evaluation to specify particular actions or indicators, as negotiations have not yet occurred that would elaborate the sector support to be provided);
- Ongoing monitoring/evaluation of the SFPA/Protocol to be provided through a technical dialogue between the country's authorities and a senior offcier in the EUD in Angola;
- A Joint Committee to meet at least yearly to assess both implementation of the SFPA/Protocol in light of the logframe, and success in implementing the sectoral support matrix;
- A Joint Scientifc Committee to meet at least yearly; and

[69] The exact process (e.g. at which level it needs to be approved) needs further clarification from the Angolan authorities

- An evaluation to be completed around 12-18 months before the Protocol expires, of both ex-post results/impacts, and of potential ex-ante results/impacts of a future Protocol. This would allow both parties to consider the need for re-negotiation of the Protocol based on its utilisation and impacts without interrupting the possibilities of access.

# 8 KEY FINDINGS AND CONCLUSIONS

This evaluation has i) highlighted a number of important points in relation to current problems of fisheries management in Angola and sectoral needs; ii) provided a number of lessons learned, and iii) evaluated three options. The final section of this report provides key findings and conclusions on these issues.

## 8.1 Key findings and conclusions about current problems and needs

Within the Angolan fisheries sector, the research and MCS capacities need strengthening, investments are needed in infrastructure, improvements urgently required in post-harvest handling, hygiene and value addition and the potential of the aquaculture sector remains largely untapped. While target stocks of highly migratory species in the region are not currently overfished, the status of many demersal fish/shrimp and small pelagics stocks in Angola is poor or poorly known (but with encouraging indications for cephalopods). Threats to sustainable exploitation of Angola's resources are of concern to both Angola and the EU.

Angola is potentially interested in negotiating a SFPA/Protocol because of the financial contributions that would result from it allowing access by EU vessels to its waters, because of the potential support to implement sectoral policy, and because of the potential contributions to employment in the country that might result from a SFPA/Protocol.

A SFPA/Protocol and access to the Angolan EEZ is important given the migratory nature of tuna in the region, and the historical presence of some EU trawlers operating in Angola under direct authorisations.

## 8.2 Key lessons from the past

Successful conclusion of SFPAs/Protocols is not assured even if an authorisation is given for negotiation. Special efforts should be made by both parties to ensure that their respective positions are clearly understood through fair and transparent negotiations (as required by the Basic Regulation on the CFP) so that compromise and common ground can be found.

A mixed species SFPA/Protocol would be of special importance for EU purse seine vessels and EU demersal trawlers (for shrimp, demersal fish and cephalopods).

While levels of EU vessel activity in Angola under direct authorisations during the last decades indicate interest and demand from EU demersal fish/shrimp vessels, the status of these stocks indicates that the condition for SFPAs/Protocols to target 'surplus resources' would not be fulfilled if a SFPA/Protocol was agreed which included more fishing opportunities for shrimp and demersal fish resources than the present levels of TACs (as per yearly Management Measures). The inclusion of small pelagic opportunities in an SFPA would seemingly not be advisable due to the status of stocks.

The present fishing effort of EU vessels on bottom shrimp is already quite significant (11 trawlers), and it is likely that increasing it (without a corresponding reduction in fishing effort from the national fleet and the non-EU foreign fleet) would not be compatible with ensuring sustainable levels of fishing. The present fishing effort for demersal fish by EU vessels is relatively limited (3 trawlers) but similar to shrimp, given stock status, any increased levels of fishing opportunities for this category could only be satisfied provided the equivalent fishing effort from the existing national and foreign vessels is reduced. For both deep sea shrimp and demersal fish, this suggests that increased fishing opportunities should not therefore be provided. The interest by EU fleet for cephalopods could however provide for new fishing opportunities which would better exploit seemingly moderately exploited resources.

EU vessel activity in the Atlantic Ocean under other SFPAs in the region has generated significant economic and social benefits to both the EU and third countries, and SFPA/Protocol funds have been effective in supporting the implementation of fisheries policy and sustainable fisheries in the region, providing a clear added value of an EU framework for access rather than leaving EU private operators to negotiate direct authorisations. Evaluations of other SFPAs/Protocols suggests that obligations to land

product in the third country with which the EU has a SFPA are generally not favoured by EU vessel owners unless onshore processing facilities are present and/or market prices are of commercial interest. In the case of Angola, landings by EU demersal trawlers are already taking place (without being compulsory).

With regards to use of sectoral support funds, lessons from other SFPAs and donor assistance more generally in the region, suggest that care should be taken in setting the level of any sectoral support funding such that the MINPERMAR does not struggle to fully utilise and benefit from the sectoral support funding due to absorption capacity, especially in light of donor projects in the sector that may be ongoing at the time of the Protocol, and of staff capacity to implement and monitor the sectoral support. Sectoral support matrices should be carefully specified and agreed during the first Joint Committee meeting such that targets and indicators are specific, measurable, agreed, realistic and timebound (SMART).

The length of Protocols to SFPAs in the Atlantic varies, but multi-annual Protocols allow EU fishing companies to better plan their fishing strategies and for third countries to have a better budget visibility and implement the multiannual sectoral programme. It may therefore be sensible for a Protocol to any SFPA with Angola to be 5-6 years.

## 8.3 Key findings and conclusions from the ex-ante evaluation

### *8.3.1 About the options*

This ex-ante evaluation has considered three possible Options. Option 1 is 'No SFPA/Protocol', where the present EU fleet operating in Angola would continue doing so under direct authorisations. Option 2 considers 'A tuna only SFPA/Protocol'. This option would provide fishing opportunities for tuna and tuna-like species for the present purse seine fleet aas well as surface longliners as 'newcomers'. Option 3 is 'A mixed species SFPA/Protocol".

Option 3 is the preferred option at the present time and would support, and be consistent with, sustainable resource exploitation provided the status of stocks (in particular those which are seemingly fully exploited) are properly monitored and show improvements over time. It could be expected to be effective in achieving the objectives as stated in Section 7.4, relevant to needs, coherent with EU fisheries and cooperation policy, and acceptable to stakeholders. Its efficiency would be dependent on the detailed content of the negotiated Protocol and should be evaluated ex-post. It would represent a win-win situation for the EU and Angola in addressing the identified needs of the different stakeholders. Option 3 is the preferred option over Option 2, given its ability to better respond to more EU vessel owner needs and the additional financial, economic and social benefits that would accrue to both parties from the fishing opportunities provided.

Any future SFPA/Protocol should incorporate the guidelines adopted under the reformed CFP and reflect the general and specific objectives presented in the ex-ante evaluation. The result of the evaluation leads to the recommendation that a mixed species SFPA/Protocol should be negotiated between the EU and Angola. The aspect of transparency needs special attention and should be specifically enshrined in any future SFPA/Protocol. It is recommended that the parties consider the following aspects for inclusion in a future SFPA/Protocol.

### *8.3.2 Aspects related to access by EU vessels to Angolan waters*

- In summary: opportunities for shrimp and demersal fishing (for which EU vessels already have access at present) in line with present levels, with additional/new opportunities for cephalopod authorisations (for which EU vessels do not currently have access).
- The SFPA/Protocol to provide access to EU vessels for highly migratory species, shrimp, demersal fish, and cephalopods;
- Fishing opportunities provided for the tuna fleet for 20-25 purse seine vessels and 6-10 longline vessels, with additional authorisations for 11 bottom shrimp trawlers (i.e. the present number of EU vessels), 3 demersal fish trawlers (the present number of EU vessels), and 3-4 cephalopods trawlers,.
- A Protocol lasting for an initial period of around 5-6 years;

- Access costs to be based on vessel fishing authorisation fees except for tuna, and a minimum reference tonnage for tuna of around 5 000 to 7 000 tonnes per year [70] with guaranteed payments per tonne for catches over the reference tonnage;
- Shipowner fees to be aligned with other SFPAs/Protocols in the region;
- The current legislation be updated, so that the requirement for foreign shipowners (to enter into an 'comparticipation association' or to create a joint venture with an Angolan partner holder of a fishing right issued by the MINPERMAR) is adjusted, if needed;
- A Joint Committee made up of representatives of both parties to meet regularly to monitor the implementation and impacts of the SFPA/Protocol;
- Financial contributions to be made by both the EU and EU vessel owners for catching vessels but only by vessel owners for supply vessels;
- A requirement for EU vessels to employ local or ACP fishing crew based on ILO principles in line with the ILO Conventions ratified by the flag States (e.g. ILO C188 ratified by France and Spain);
- A requirement for EU vessels to employ local observers upon request by the Angolan authorities;
- No requirement for EU fishing vessels to land catch in Angola (although vessels, in particular demersal and cephalopods trawlers might be incentivised to do so – demersal trawlers already sell locally at present);

### *8.3.3 Aspects related to sectoral support*

- Sectoral support funding used for the following priority areas: [71]
  - improvement of fisheries research
  - improvement of MCS
  - building capacities of staff in various Directorates of the MINPERMAR and at provincial level, and of small-scale fisheries and community organisations
  - support to the development of the marine aquaculture sector
  - improvement of post-harvest quality and value addition
- Detailed specifications of activities to be included in the sectoral support matrix should be agreed as part of the negotiation process once the amount of sectoral funding is agreed and based on the activities and priorities of other donor projects at that time, avoiding duplication and ensuring synergies;
- Sectoral support measures should be focused on a few specific priority activities, so as to reduce the complexity of implementation and their monitoring; and
- The sectoral support matrix should include an explicit breakdown of activities, with objectively verifiable indicators of achievements expressed as targets for each stage of implementation.
- There is a need to involve all stakeholders in the various steps of the process.

[70] Average tuna catches over the past 4 years have been c.a. 4 750 tonnes per year; the reference tonnage is increased due to the operation of EU longliners, not currently fishing in Angola

[71] Other priorities could include: upgrading of harbour infrastructure and services, support to seamen training applying the SCWF-F standard, and actions related to the blue economy

# ANNEXES

## Annex 1 : List of acronyms and abbreviations

For abbreviations and definitions of terms used in this report such as 'pelagic' and 'demersal', see also the EU terminology website - IATE : https://iate.europa.eu/

NB : for Angolan/French acronyms and abbreviations, related full names in English

| Acronym / Abbreviation | Full name |
|---|---|
| ACP | African, Caribbean and Pacific |
| AF | Artisanal Fishing |
| AfDB | African Development Bank |
| AGO | Angola |
| AIPCE | European Fish Processors Association |
| AIS | Automatic Identification system |
| ANM | *Agência Nacional Marítima* – National Maritime Agency |
| AOA | (Angolan) Kwanza |
| ATLAFCO | Ministerial Conference on fisheries cooperation among African States bordering the Atlantic Ocean (COMHAFAT in French) |
| BBC | British Broadcasting Corporation |
| BCC | Benguela Current Convention |
| BNA | *Banco Nacional de Angola* – Angola National Bank |
| ca. | Cerca |
| CAPA | *Centro de Apoio à Pesca Artesanal* – Support Centre for Artisanal Fisheries |
| CAPE/CFFA | Coalition for Fair Fisheries Agreements |
| CECAF | Fishery Committee for the Eastern Central Atlantic |
| CEFOPESCAS | *Centro de Formação das Pescas* – Fisheries Training Centre |
| CME | Continuous Monitoring Equipment |
| COREP | Regional Fisheries Commission for the Gulf of Guinea |
| DG | Directorate-General |
| DG INTPA | Directorate-General for International Partnerships |
| DG MARE | Directorate-General for Maritime Affairs and Fisheries |
| DG SANTE | Directorate-General for Health and Food Safety |
| DG TRADE | Directorate-General for Trade of the European Commission |
| DNGQPS | *Direção Nacional de Gestão de Qualidade e Produção de Sal* – National Directorate for Quality Management and Salt Production |
| DNP | *Direção Nacional das Pescas* – National Fisheries Directorate |
| EBA | Everything But Arms |
| EEAS | European External Action Service |
| EEZ | Exclusive Economic Zone |
| ENMA | *Estratégia National do Mar de Angola - National Strategy for the Angolan Sea* |
| EPA | Economic Partnership Agreement |
| EU | European Union |
| EUD | Delegation of the European Union |
| EUR | Euro |
| FAO | Food and Agriculture Organisation (of the United Nations) |
| FRESAN | *Fortalecimento da Resiliência e da Segurança Alimentar e Nutricional* |
| GDI | Gender Development Index |
| GDP | Gross Domestic Product |
| GEPE | *Gabinete de Estudos, Planeamento e Estatística* – Studies, Planning and Statistics Service |
| GJI | *Gabinete Jurídico e de Intercâmbio* – Legal and Cooperation Service |
| HDI | Human Development Index |
| hp | Horse Power |

| Acronym / Abbreviation | Full name |
|---|---|
| ICCAT | International Commission for the Conservation of Atlantic Tunas |
| IF | Industrial Fishing |
| IFAD | International Fund for Agricultural Development |
| ILO | International Labour Organisation |
| IMO | International Maritime Organisation |
| INIP | *Instituto Nacional de Investigação Pesqueira* - National Fisheries Investigation Institute |
| INMAR | *Instituto Nacional do Mar (Portugal)* |
| IPA | *Instituto Nacional de Desenvolvimento da Pesca e Aquicultura* - Institute of Artisanal Fisheries and Aquaculture |
| IUU | Illegal Unregulated and Unreported (fishing) |
| IVQ | Individual Vessel Quota |
| kg | kilograms |
| LDAC | Long Distance Advisory Council |
| LDC | Least Developed Country |
| LOA | Length OverAll |
| LRBA | *Lei dos Recursos Biológicos Aquáticos* – Law of the Biological Aquatic Resources (or Fisheries Act) |
| PSMA | Port States Measures Agreement |
| MINPERMAR | *Ministério das Pescas e Recursos Marinhos* - Ministry for Fisheries and Marine Resources |
| MIP | Multi-annual Indicative Programme |
| MPA | Marine Protected Area |
| MS | Member State |
| PESCAO | Improved Regional Fisheries Governance in Western Africa |
| OV | Observational visit |
| PFA | Pelagic Freezer Association |
| PLANAPESCAS | *Plano Nacional das Pescas* – National Fisheries Plan |
| POPA | *Plano de Ordenamento da Pesca e Aquicultura* - Fisheries and Aquaculture Management Plan |
| PORAMP | Network Management Plan for Marine Protected Areas |
| RDP | *Regulamento Geral das Pescas* – General Fisheries Decree |
| RSA | Republic of South-Africa |
| SDG | Sustainable Development Goal |
| SEAFO | South East Atlantic Fisheries Organisation |
| SFPA | Sustainable Fisheries Partnership Agreement |
| SIF | Semi Industrial Fishing |
| SIFA | Sustainable Investment Facilitation Agreement |
| SMART | Specific, Measurable, Agreed, Realistic and Timebound |
| SNFPA | *Serviço Nacional e Fiscalização da Pesca e Aquicultura* - National Fisheries and Aquaculture Inspection Service |
| SWOT | Strengths, Weaknesses, Opportunities and Threats |
| TAC | *Total Admissível de Capturas* – Total Allowable Catch |
| TVET | Technical and Vocational Education and Training |
| UAE | United Arab Emirates |
| UCF | *Unidade de Correção Fiscal* |
| USD | American Dollar |
| VMS | Vessel Monitoring System |
| WARFP | West Africa Regional Fisheries Programme |
| WFP | World Food Programme |
| WGASP-S | Working Group on the Assessment of Small Pelagic Fish – Subgroup South |

**Annex 2: List of figures and tables**

***List of figures***



***List of tables***

## Annex 3: Consulted organisations and Overview of the views expressed by the EU / international stakeholders

Consulted organisations

Note: All Member State, private sector and civil society organisations shown below were consulted and approached for views using a questionnaire; those that responded are shown with an * in the table below

| Member States administrations | Office |
|---|---|
| France * - Ministry of Agriculture and Alimentation | Directorate of maritime fisheries and aquaculture - Bureau of international affairs |
| Germany * - Federal Ministry of Food and Agriculture (BMEL) | Unit 614 (Seafisheries management and control, IWC) |
| Greece * - Hellenic Ministry of Rural Development & Food | Directorate General for Fisheries - Directorate of Fisheries Policy - Department of Common Fisheries Policy & Common Market Organisation |
| Italy - Ministry of Agriculture, Alimentation and Forest Policy | General Directorate of maritime fisheries and aquaculture - International and EU relations services |
| Ireland - Department of Agriculture, Food and the Marine (DAFM) | Sea-Fisheries Policy & Development Division - Head of Division |
| Latvia * - Fisheries Department Ministry of Agriculture | Division of Fishing Management and Fish Resources |
| Lithuania * - Ministry of Agriculture | Fisheries Unit |
| The Netherlands * - Ministry of Agriculture, Nature and Food Quality | Councelor |
| Poland * - Ministry of Agriculture and Rural Development | Fisheries Department |
| Portugal * - Ministry of Agriculture and Sea (MAM) | General directorate of natural resources, maritime safety, and services – Division of external resources, head of the Division |
| Spain * - Ministry of Agriculture, Fisheries, Alimentation and Milieu Naturel (MAPAMA) | General directorate of fisheries resources, Division of agreements and regional fisheries organisations |
| **Private sector** | |
| LDAC – Long Distance Advisory Council | Executive secretary |
| Market AC * | Executive secretary |
| South-Western Waters AC * | Executive secretary |
| Association / producers organisations representing EU fishing vessels | |
| France * - ORTHONGEL (representing tropical tuna French purse seiners) | Managing Director |
| Greece * - Anastasakis group of companies | Managing Director |
| The Netherlands * - Pelagic Freezer Association (PFA) | President |
| Spain * - ANACEF | Managing Director |
| Spain * - OPNAPA 88 (high seas longliners association) | Managing Director |
| Spain * - OPPC 3 | Managing Director |
| DAKAR TUNA (representing owners of the EU pole and line vessels based in Dakar) | Managing Director |
| Spain - ORPAL | Managing Director |
| Spain * - OPP 07 | Managing Director |
| Spain - CEPESCA (Spanish confederation of Fisheries associations) | Executive secretary |

| | |
|---|---|
| Spain * - ORPAGU (high seas longliners association) | Managing Director |
| Spain – OPROMAR - producer organisation of fresh fishing (Galicia) | Managing Director |
| Spain * - ANABAC (representing tropical Spanish tuna purse seiners | Managing Director |
| Spain - OPAGAC (representing Spanish owners of tropical tuna purse seiners) | Managing Director |
| Spain * - ANAMAR | Managing Director |
| Portugal - ADAPI - Associação dos Armadores das Pescas Industriais | Managing Director |
| Portugal - ADAPLA – Associação dos Armadores da Pesca Longínqua | Managing Director |
| Portugal - AMAP - Associação Mútua Financeira Livre dos Armadores da Pesca Geral do Centro | Managing Director |
| Portugal - VIANAPESCA - Cooperativa de Produtores de Peixe de Viana do Castelo | Managing Director |
| Portugal - AAPLCLZO - Associação de Armadores da Pesca Local Costeira e Largo da Zona Oeste | Managing Director |
| **Civil Society** | |
| AIPCE | Executive secretary |
| AWFISHNET | President |
| CFFA * | Coordinator |
| EJF * | Executive secretary |
| ETF - European Transport Workers' Federation (trade union representative) | Executive secretary |
| Europêche | Executive secretary |
| Oceana | Executive secretary |
| WWF | Executive secretary |

**Summary of views**

EU operator views were consistent in the need for any conditions/obligations for them that would be included in a SFPA/Protocol to be similar to those contained in other SFPAs/Protocols in the region. Needs were expressed for tuna purse seine (currently operating in Angola) and surface longlining (potential 'newcomers'). Needs were also expressed for continuation of current demersal fish and shrimp trawl opportunities, and new opportunities for cephalopod and small pelagics. Tuna and non-tuna operators were not averse to taking onboard Angolan (or ACP) crew and observers, as they currently do according to the Angolan legislation (subject to skills, time spent in the Angolan fishing zone, and ICCAT requirements for tuna operators). Tuna operators consistently expressed views that landing product in Angola would not be feasible or desired given current infrastructure in the country, and the normal practice of landing to Dakar, Abidjan or Tema. Trawler operators insist on the need for port infrastructure and services improvements in Angola so as to be able to transship and/or land their catch in standard conditions. None are favorable to compulsory landing of catches (except demersal trawlers which currently supply the national market).

The Market Advisory Council presented specific recommendations related to a possible SFPA between the EU and Angola[72]: Proceed with the negotiation and conclusion of the mentioned SFPA; b) In the scope of the ex-ante evaluation and of the possible SFPA/Protocol, cover the fight against IUU fishing, transparency, and a more even playing field between the various fishing fleets operating in the partner country's waters; c) Reflect the

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considerations present in the advice adopted on 9 March 2021 on "Roadmap on the Evaluation of the Sustainable Fisheries Partnership Agreements (SFPAs)"3, including market and trade aspects as well as social issues; d) Encourage Angola to align with EU sanitary standards, with a view to having the competent authority in Angola approved by the EU; e) Ensure respect for the resolutions adopted by ICCAT; f) Include a chapter in the Protocol that guarantees the alignment of Angola with the EU legislation on IUU fishing.

One civil society organisation expressed views about the importance of: the SFPA supporting sustainable and transparent fisheries management in Angola, for the benefit of coastal communities and the population; inclusion of a zoning that protects the coastal zone from the activities of industrial and semi-industrial vessels; extension/strengthening (and better application) of the non-discrimination clause; inclusion of an article on transparency; at the level of sectoral support, a mechanism that allows actors in the sector (in particular small-scale fisheries) and civil society to participate in the identification, implementation and evaluation of actions to be supported, publication of annual reports, support to initiatives in favour of small-scale fisheries (infrastructure, hygienic landing sites, support for women's processing activities, etc.), supporting the safety of small-scale fishermen at sea (geolocation equipment, safety training for captains, etc.) - it should be noted that Angola has ratified ILO Convention 188 on the Improvement of Working Conditions in Fishing; strengthen research and MCS capacities; increase the collaboration/joint actions with neighbouring countries, Namibia and South Africa, and ICCAT Contracting Parties (e.g. ship register, scientific observer programme, control and surveillance).

Other views are those as reported in Section 7.1 (needs assessment).

## Annex 4: Consulted organisations in Angola

| Organisation | Unit/departement/other | Position of the person consulted |
|---|---|---|
| Ministry for Fisheries and Marine Resources (Luanda) | Minister's Office | Minister |
| | Secretary of State's Office | Secretary of State |
| | National Fisheries Directorate | National Director |
| | National Directorate for Quality Management and Salt Production | National Director |
| | National Directorate for Sea Affairs and Marine Resources | National Director |
| | National Fisheries and Aquaculture Inspection Service | National Director and Department Head |
| | Studies, Planning and Statistics Office | National Director |
| | Legal and Exchange Office | National Director |
| | Information Technology, Institutional Communication and Press Office | National Director |
| | National Fisheries Research Institute | National Director |
| | National Institute for Support to the Fishing Industry | National Director and Technical Director |
| Others (Luanda) | Pescangola (fisheries port) | Director |
| | Crustangola (private company) | CEO and advisers |
| Agencies (Luanda) | Delegation of the European Union in the Republic of Angola | Ambassador |
| | | Councelor |
| | | Councelor |
| | Portugal Embassy | Councelor |
| | French Embassy | Ambassador and Councelor |
| | Polish Embassy | Councelor |
| | Finnish/Romanian/Belgian Embassies | Councelor/Ambassador/Councelor |
| Benguela Province | Provincial Fisheries Office | Provincial Director |
| | Octosea (private company) | Technical Director |
| | Vilmar e Filhos (private company) | Director |
| | Alva Fishing (private company) | Director |
| | Pescaria Iemanjá (private company) | Director |

## Annex 5: Coverage of evaluation questions in the main text

Table 15 below shows where the specific evaluation questions posed in the Terms of Reference for this specific contract are addressed in the main text of this report.

**Table 15: Evaluation questions and coverage in the text of the report**

| Evaluation questions | Section of report addressed |
|---|---|
| Is the Angolan EEZ of strategic interest in the CFP context? (Geographic location of the fishing zone; relevance and importance of the available resources for the EU fleet: fishing, commercial and economic interests) | Section 7.1.3, and Annex 7 |
| What are the availability and state of the stocks and notably, of the stocks that could be included in future protocols? (Biomass, estimated surplus, possible MSY;…) | Section 4 and Annex 7 |
| To what extent would an SFPA with Angola fit into a regional network of SFPAs? | Section 7.1.3, Annex 7 |
| What are the challenges facing the fishery sector in Angola? | Sections 2, 3, 5, 7.1.2, and 8.1 |
| What main areas would benefit from the Sectoral Support funds? | Sections 2, 3, 5, and 7.1.2 |
| What reference tonnage could be envisaged? | Section 7.1.3 and 8.3 |
| What are the needs of the EU and of the EU ship owners, of Angola? | Section 7.1.1, 7.1.2, and 7.1.3 |
| Are there any obstacles to investment by EU economic operators in the fisheries sector of Angola and how can these be addressed in order to facilitate economic cooperation? | Section 2 and 5.2 |
| What are the expected effects of an EU intervention?<br>For the EU: extra employment, income, supply...?<br>For Angola: employment, processing industry, institutional strengthening, state budget, food security...?<br>For both: contribution to fight against IUU, environment, other objectives? For the ship owners: to what extent are the EU ship-owners supporting the conclusion of a new agreement? | Section 7.5 |
| To what extent would be / is relevant to have a SFPA/protocol with Angola? | Section 7.5 and 7.6 |
| What alternative instruments could be considered and why is the proposed one chosen? | Section 7.4 and 7.5 |
| If having an SFPA is the chosen option, assess the feasibility of having a tuna agreement only or a mixed agreement | Section 7.5 |
| In the case of a mixed agreement, what species could be included? | n/a |
| What risks are involved in the implementation of the various interventions and what countermeasures could be proposed? | Section 7.5.4 |
| What would be the most likely consequences of no renegotiating the agreement? | As discussed for Option 1 in Section 7.5 |
| What are the present interventions by the EU, Member States, other donors and private sector in relation to fisheries in Angola (incl. aid to sector development programmes)? | Section 2.6 |
| Which option could be complementary to and coherent with other interventions: what synergies could be expected? | Section 7.5 and 7.6 |
| What is the role and impact of ICCAT, CECAF and ATLAFCO/COMHAFAT? Would a new agreement contribute to strengthen the role of the EU in the region as a fishing player and as a market outlet? | Section 7.5 and 7.6 |
| What are the conclusions of previous evaluations or relevant reports and studies? | Section 7.8 |
| What insights do past and current experience in the region offer (SFPAs with Mauritania, Guinea-Bissau...)? | Section 7.8 |
| How can these lessons be applied to improve EU intervention? | Sections 7.8 and 8.2 |
| Which indicators, data collection arrangements or monitoring systems should be envisaged in order to ensure proper evaluation of the EU intervention in the future? | Section 8.3 |
| What are the different cost implications of the various possible options? (direct financial outlays from the EU budget, administrative costs for the Commission, human resources needed and costs for third parties) | Section 7.7 |
| Will the benefits and longer-term impacts of the interventions justify the cost of it? | Section 7.7 |

## Annex 6: Supporting data

### In Chapter 4 – Stock Status

FAO – CECAF – further information

- FAO - CECAF Scientific Sub-Committee, 5 – 9 December 2022 meeting in Nouakchott, Mauritania – support documents: https://www.fao.org/fishery/en/meeting/41370 latest access 23.03.23
- Next meetings of relevant FAO- CECAF working groups: https://www.fao.org/cecaf/events/zh/

Information by marine species

- European Commission website on fish commercial designations:

  Example *Aristeus varidens:* https://fish-commercial-names.ec.europa.eu/fish-names/species_en?sn=8397

- FIRMS - Fisheries and Resources Monitoring System: https://firms.fao.org/firms/resource/search/en
- Fishbase – for marine finfish: https://www.fishbase.org.au/v4
- FAO species factsheets: example – South African pilchard - https://www.fao.org/fishery/en/aqspecies/2895/en

Additional information on tuna stocks

- ICCAT dedicated web page: https://www.iccat.int/en/assess.html
    - Other relevant web page: 23rd special meeting of the Commission: https://www.iccat.int/com2022/index.htm# see especially the report of the SCRS PLE-104

ISSF - International Seafood Sustainability Foundation – interactive tool: https://www.iss-foundation.org/tuna-stocks-and-management/our-tuna-stock-tools/interactive-stock-status-and-catch-tool/

**Extracts from the 2021 SFPA between the EU and the Islamic Republic of Mauritania related to transparence**
In French

Source : Accord de Partenariat dans le domaine de la pêche durable entre l'Union Européenne et la République Islamique de Mauritanie - L 439/3 du 8.12.2021

**Article 3 : Principes et objectifs pour la mise en œuvre du présent accord**

*Paragraphe 3* : "Dans un souci de transparence, la Mauritanie s'engage à rendre public et à échanger des informations sur tout accord autorisant des navires étrangers dans la zone de pêche et sur l'effort de pêche résultant de ces accords, notamment le nombre d'autorisations de pêche délivrées, les captures déclarées et les zones de pêche autorisées.

**Article 4 : Effort global de pêche dans les eaux mauritaniennes et transparence**

*Paragraphe 4* - L'ensemble des mesures techniques de conservation, d'aménagement et de gestion de la ressource, ainsi que les modalités financières, redevance, contribution financière publique et autres droits inclus, subordonnant l'octroi des autorisations de pêche, tels que précisés pour chaque pêcherie dans l'annexe I du présent protocole, seront applicables à toute flotte industrielle étrangère opérant dans les zones de pêche mauritaniennes dans des conditions techniques similaires à celles des navires de l'Union.

*Paragraphe 5* - La Mauritanie s'engage à rendre public tout accord public ou privé autorisant l'accès à sa zone de pêche par des navires étrangers, y compris:

a) les États ou autres entités participant à l'accord;

b) la période ou périodes couvertes par l'accord;

c) le nombre de navires et les types d'engins autorisés;

d) les espèces ou les stocks autorisés pour la pêche, y compris toute limite de capture applicable;

e) les mesures de déclaration, de suivi, de contrôle et surveillance requises;

f) une copie de l'accord écrit.

*Paragraphe 6*. Aux fins de l'application des paragraphes 4 et 5 du présent article, la Mauritanie communique chaque année à l'Union un rapport détaillé précisant le nombre d'autorisations de pêche par catégorie de pêche délivrées à des navires battant pavillon d'autres États tiers, les volumes autorisés de captures correspondants, les captures effectivement réalisées ainsi que les modalités financières et techniques d'accès de ces navires à la zone de pêche. Ce rapport est examiné par la commission mixte et peut être mis à la disposition du comité scientifique conjoint indépendant prévu à l'article 9.

**Article 5 - Contribution financière**

*Paragraphe 16* - La contribution financière visée au paragraphe 1 est inscrite au budget de l'État et est soumise aux règles et procédures de gestion des finances publiques mauritaniennes. Elle tient compte des principes de bonne gestion financière, en particulier du principe d'économie, d'efficience et d'efficacité, en respectant, en particulier, les principes de transparence, de proportionnalité, de non-discrimination et d'égalité de traitement.

**ANNEXE II – Mise en œuvre de l'appui sectoriel à la promotion d'une pêche responsable et durable**

*Paragraphe 5* - La composante d'appui sectoriel contribue à faire progresser l'engagement pris par la Mauritanie dans les domaines de la gestion durable des ressources, de la protection des zones marines et côtières, de la transparence des activités de pêche, de l'amélioration de la sécurité alimentaire et nutritionnelle de la population, de la création de valeur ajoutée et d'emplois en Mauritanie.

Transparence et traçabilité des fonds relatifs à l'appui sectoriel (*Paragraphes 7 à 11*).

**Extracts from 'REGULAMENTO (UE) 2017/2403 DO PARLAMENTO EUROPEU E DO CONSELHO de 12 de dezembro de 2017, relativo à gestão sustentável das frotas de pesca externas'**

In Portuguese

Artigo 5 - Em 2014, todos os membros da FAO, incluindo a União e os seus parceiros nos países em desenvolvimento, adotaram por unanimidade as Diretrizes Voluntárias para Assegurar a Pesca Sustentável em Pequena Escala no Contexto da Segurança Alimentar e da Erradicação da Pobreza. O ponto 5.7 dessas diretrizes salienta que a pesca de pequena escala deverá ser devidamente tida em conta antes da celebração de acordos de acesso aos recursos com países terceiros e com outras partes.

Artigo 18 - Nas águas dos países terceiros, os navios da União podem operar quer em conformidade com as disposições dos APPS celebrados entre a União e os países terceiros, quer através da obtenção de autorizações diretas dos países terceiros, se não estiver em vigor um APPS. Em ambos os casos, estas atividades deverão ser realizadas de forma transparente e sustentável. Os Estados-Membros de pavilhão poderão autorizar os navios que arvoram o seu pavilhão a pedir e a obter autorizações diretas concedidas por países terceiros que sejam Estados costeiros, em conformidade com uma série de critérios definidos e mediante acompanhamento. As operações de pesca deverão ser autorizadas após o Estado-Membro de pavilhão se ter certificado de que não irão prejudicar a sustentabilidade, e se a Comissão não tiver objeções devidamente justificadas. O operador só deverá ser autorizado a iniciar as suas operações de pesca após ter obtido autorização do Estado-Membro de pavilhão e do Estado costeiro.

Definições: "Autorização direta", uma autorização de pesca emitida pela autoridade competente de um país terceiro a um navio de pesca da União fora do âmbito de um APPS ou de um acordo de troca de oportunidades de pesca e gestão conjunta de espécies de interesse comum;

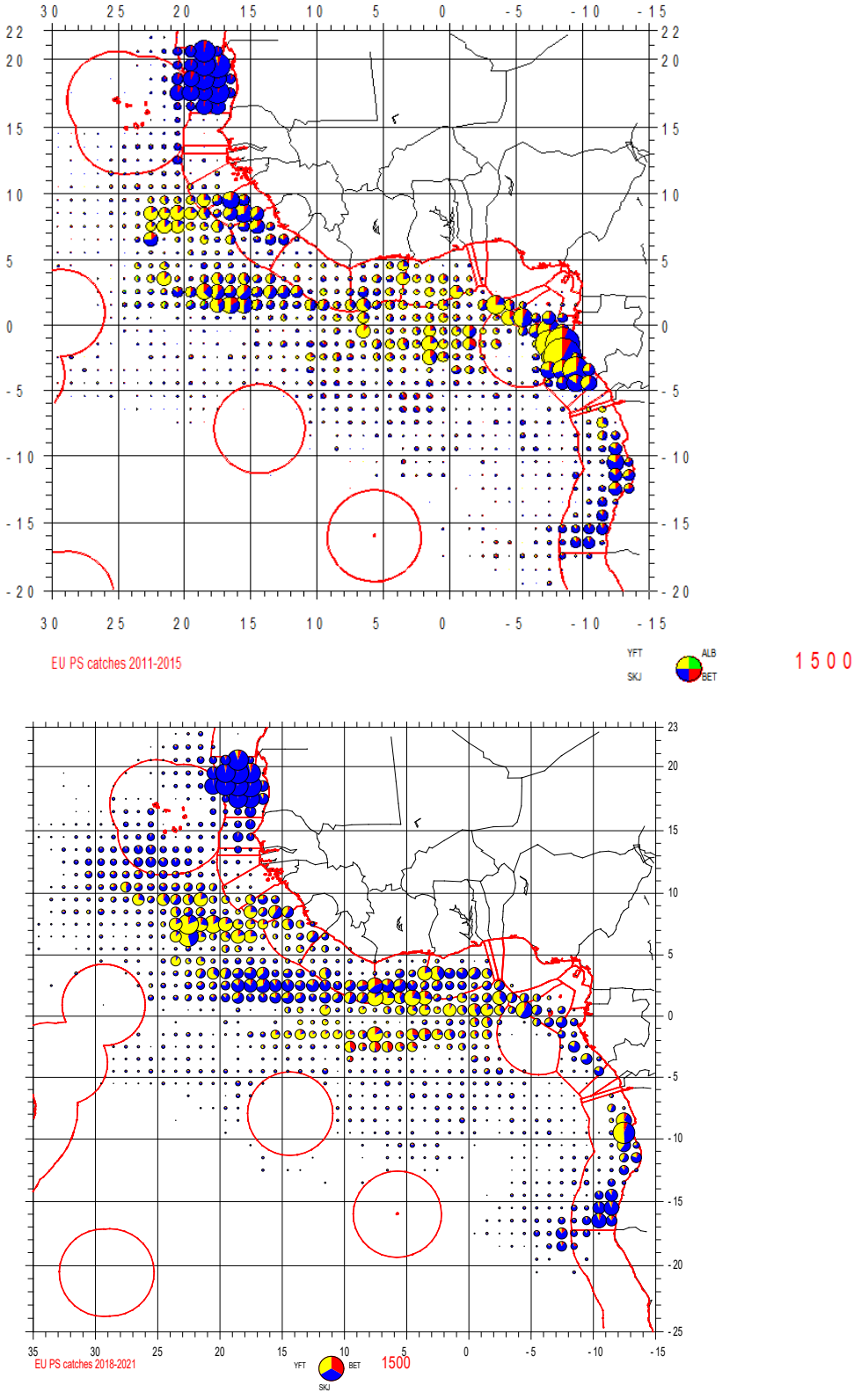
"Programa de observadores", um regime sob a égide de uma ORGP, de um APPS, de um país terceiro ou de um Estado-Membro que envia observadores a bordo dos navios de pesca, inclusive, se tal estiver especificamente previsto no regime de observação aplicável, para verificar se o navio cumpre as regras adotadas por essa ORGP ou por esse país terceiro, ou por esse APPS;

"Fretamento", um acordo por meio do qual um navio de pesca que arvora pavilhão de um Estado-Membro é contratado por um período definido por um operador, noutro Estado-Membro ou num país terceiro, sem mudar de pavilhão;

Seção 3 – Operações de pesca ao abrigo de autorizações diretas

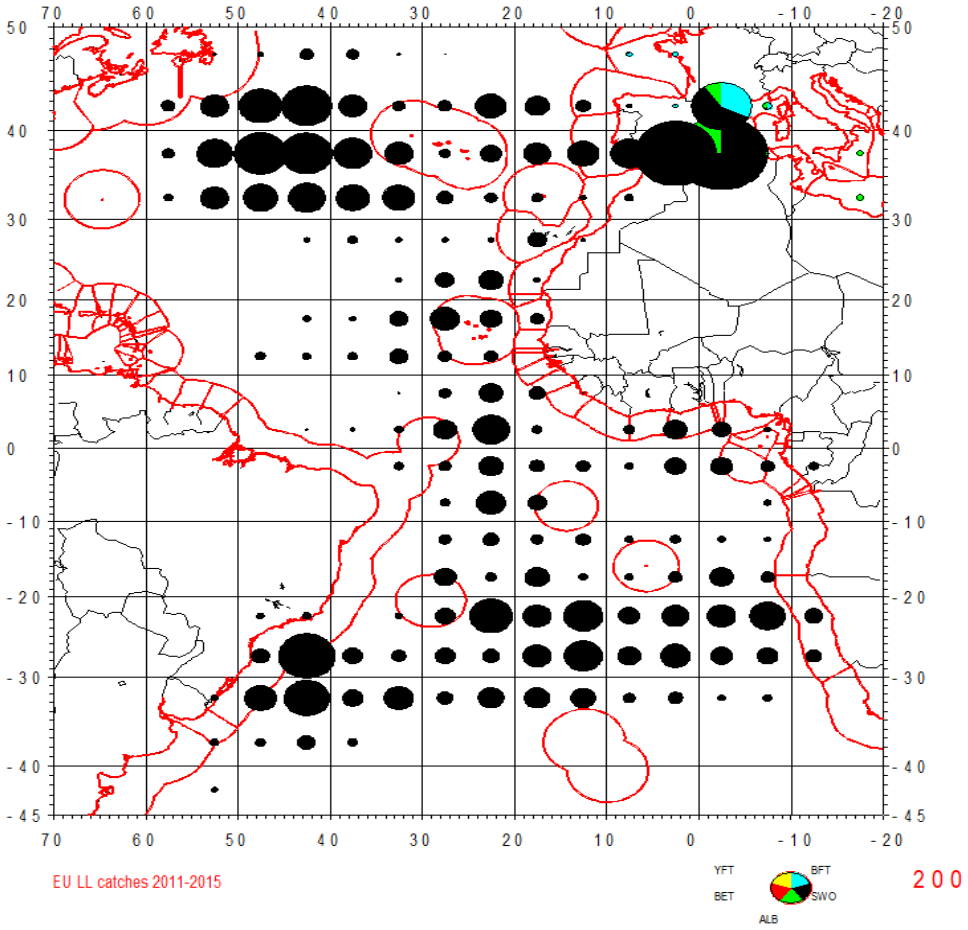
**Location of EU (French and Spanish) tuna purse seine fleet and the EU (Spanish and Portugese) tuna surface longline fleet catches in the Atlantic Ocean**

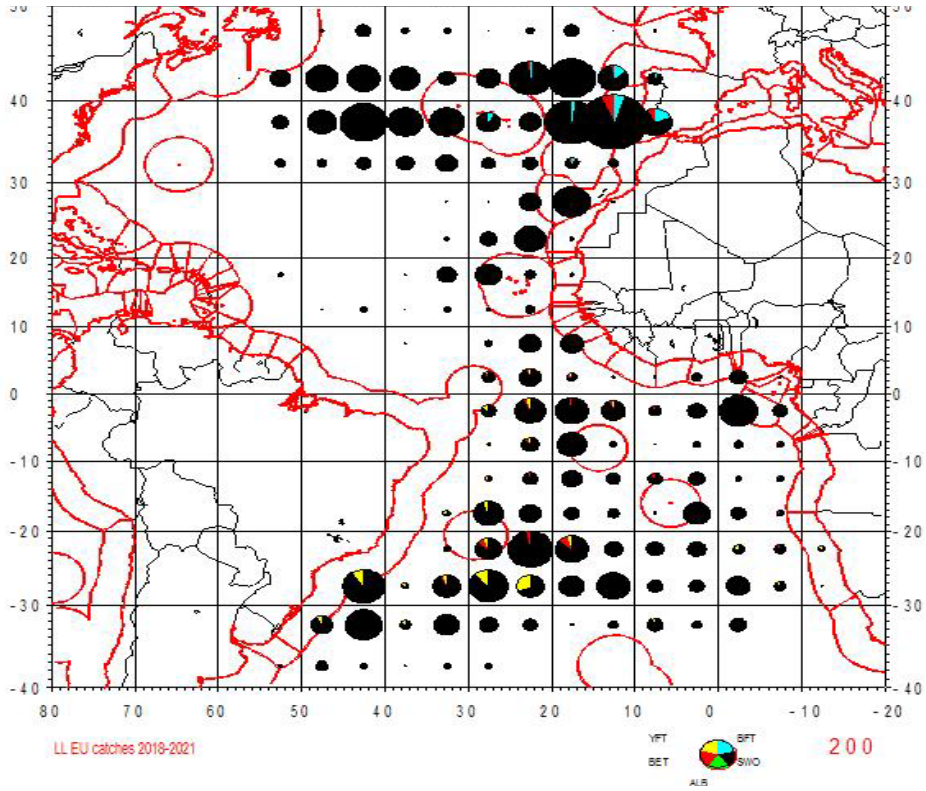
**Figure 3: Location of EU (French and Spanish) tuna purse seine fleet catches in the Atlantic Ocean (2011-2015 and 2018 - 2021)**




Source : Consultant's own elaboration based on ICCAT Task 2 data

**Figure 4: Location of EU (Spanish and Portugese) tuna surface longline fleet catches in the Atlantic Ocean (2011-2015 and 2018 - 2021) – exc. sharks**




Source : Consultant's own elaboration based on ICCAT Task 2 data

## Annex 7 : List of references

### National legislation

Law on Aquatic Biological Resources n.o 6-A/04 of 8 October ('LBRA')

Decree No 41/05 of 13 June 2005 on General Fisheries Regulation

Management Plan for Fisheries and Aquaculture (POPA) 2018-2022

Presidential Decree n.o 284/22 of 8 December on the MINPERMAR organogram ('Estatuto Orgânico')

Regulation n.o 34/06 of 10 March re. the rates applied to fishing vessels

Presidential Decree No 93/19 of 25 March re. the management measures for marine fisheries, inland fisheries, aquaculture and salt for the year 2019

Presidential Decree No 130/20 of 11 May re. the management measures for marine fisheries, inland fisheries, aquaculture and salt for the year 2020

Presidential Decree No 84/21 of 13 April re. the management measures for marine fisheries, inland fisheries, aquaculture and salt for the year 2021

Presidential Decree No 70/22 of 31 March re. the management measures for marine fisheries, inland fisheries, aquaculture and salt for the year 2022

Presidential Decree No 8/23 of 4 January re. the management measures for marine fisheries, inland fisheries, aquaculture and salt for the year 2023

National Plan for Fisheries 2023-2027 (called PLANAPESCAS)

Presidential Decree 284/14 of 13 October regulates measures to prevent, combat and eliminate illegal, unreported and unregulated fishing

Long Term National Development Strategy 'Angola 2025'

National Development Plan 2018-2022 (PND).

National Strategy for the Angolan Sea (ENMA) 2030 (Presidential Decree No. 183/22 of 22 July)

Marine Spatial Management Plan

### EU legislation (and other related documents)

European Union law portal EUR-LEX - https://eur-lex.europa.eu/

*EU SFPAs*

Accord de Partenariat dans le domaine de la pêche durable entre l'Union Européenne et la République Islamique de Mauritanie - L 439/3 du 8.12.2021

PROTOCOL defining, for the period from 3 May 1999 to 2 May 2000, the fishing opportunities and financial compensation provided for in the Agreement between the European Community and the Government of the People's Republic of Angola on fishing off Angola

Agreement between the European Economic Community and the Government of the People's Republic of Angola on fishing off Angola - Protocol establishing the fishing rights and financial contribution provided for in the Agreement between the European Economic Community and the Government of the People's Republic of Angola on fishing off Angola. Official Journal L 268 , 19/09/1987

2005 Proposal for a council regulation denouncing the Agreement between the European Economic Community and the Government of the People's Republic of Angola on fisheries off Angola and derogating from Regulation (EC) No 2792/1999.

Resolução legislativa do Parlamento Europeu sobre uma proposta de regulamento do Conselho que denuncia o acordo entre a Comunidade Económica Europeia e o Governo da República de Angola relativo à pesca ao largo de Angola e derroga ao Regulamento (CE) n. o 2792/1999 (COM(2005)0677— C6-0035/2006 — 2005/0262(CNS). ELI: http://data.europa.eu/eli/reg/2013/1380/2019-08-14

Regulation (EU) 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

Règlement d'exécution (UE) 2021/405 de la Commission du 24 mars 2021 établissant les listes des pays tiers ou régions de pays tiers en provenance desquels l'entrée dans l'Union de certains animaux et biens destinés à la consommation humaine est autorisée conformément au règlement (UE) 2017/625 du Parlement européen et du Conseil (Texte présentant de l'intérêt pour l'EEE)Texte présentant de l'intérêt pour l'EEE. ELI : https://eur-lex.europa.eu/legal-content/FR/TXT/?uri=CELEX:02021R0405-20220812 (version consolidée du 12.08.2022)

Regulamento (UE) 2017/2403 do Parlamento europeu e do Conselho de 12 de dezembro de 2017, relativo à gestão sustentável das frotas de pesca externas, e que revoga o Regulamento (CE) n.o 1006/2008 do Conselho

Regulamento (CE) N. o 1005/2008 do conselho de 29 de Setembro de 2008 que estabelece um regime comunitário para prevenir, impedir e eliminar a pesca ilegal, não declarada e não regulamentada, que altera os Regulamentos (CEE) n. o 2847/93, (CE) n. o 1936/2001 e (CE) n. o 601/2004, e que revoga os Regulamentos (CE) n. o 1093/94 e (CE) n. o 1447/1999

**Others**

Multi-annual Indicative Programme (MIP) for the period 2021-2027

Evaluation of the European Union's cooperation with Angola 2008-2020. Evaluation report, February 2022

Estudo da cadeia de valor do sector das pescas em Angola. PRODESI

FAO (2019) Report of the FAO/CECAF Working Group on the Assessment of Small Pelagic Fish – Subgroup South. Elmina, Ghana, 12-20 September 2018. CECAF/ECAF Series / COPACE/PACE Séries No. 19/81. Rome. 216 p. Internet: https://www.fao.org/3/ca5402b/ca5402b.pdf latest access: 23.03.23

FAO (2022a) Fishery Committee For The Eastern Central Atlantic (CECAF) - Scientific Sub-Committee - Ninth Session - Nouakchott, Mauritania, 5–9 December 2022 - Small pelagics Working Group South 2022 – meeting summary. 18 p. Internet: https://www.fao.org/3/cc3390b/cc3390b.pdf latest access 23.03.23

FAO (2022b) Fishery Committee For The Eastern Central Atlantic (CECAF) - Scientific Sub-Committee - Ninth Session - Nouakchott, Mauritania, 5–9 December 2022 - Demersal resources Working Group South 2022 – meeting summary. Ref. CECAF/SSCIX/2022/4d. Bilingual version. December 2022. 34 p. Internet: https://www.fao.org/3/cc3292b/cc3292b.pdf latest access 23.03.23

Enhancing climate change resilience in the Benguela Current fisheries systems – small pelagic fisheries. Angolan national report, 2023

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