

## Negotiating Economic Partnership Agreements

### Fisheries



CFFA - Coalition for Fair Fisheries Arrangements

The aim of this *InBrief* series is to identify the key issues at stake within the various chapters of the Economic Partnership Agreements (EPAs) being negotiated between the European Union and six African, Caribbean and Pacific (ACP) regional groupings. Each *InBrief* addresses one chapter, offering an overview of the trade or trade-related provisions, highlighting their relevance for the ACP and identifying a range of policy options for the negotiations.

### Introduction

The current non-reciprocal preferential trade relations under the Cotonou Partnership Agreement between the European Union (EU) and ACP (African, Caribbean, Pacific) States are due to be replaced by comprehensive Economic Partnership Agreements (EPAs) between the EU and ACP regional groupings.

A vital issue for ACP negotiators is to determine the key issues in each of the chapters of these proposed EPAs, define their interests, and identify various policy options.

The EPA *In Brief on Fisheries* aims to give an overview of the fisheries issues at stake in the EPA negotiations. It provides, in a non-technical way, an introduction to, and a synthesis of the fisheries issues to be addressed in the negotiations. It highlights the main aspects of fisheries in international (bilateral and multi-lateral) agreements and its relevance for ACP countries, it discusses the EU's likely position on fisheries in the EPA negotiations, and explores relevant options for the ACP States in fisheries negotiations with the EU.

### Fisheries in the context of international trade

Fish and fisheries products have become the most important foreign exchange earner among all agriculture products traded by developing countries. Net foreign exchange receipts<sup>1</sup> in developing countries for fishery products increased from US\$3.7 billion in 1980 to US\$18.0 billion in 2000 - a 2.5-fold increase in real terms.

Developed countries account for more than 80 % of total fishery product imports. The main international markets for fishery products are the European Union, with about 76 % of the import value, the USA and Japan.

Whilst the developed countries markets may offer the best prices, fish exporters in developing countries face an increasing number of trade barriers (both tariff and non-tariff).

Tariff barriers tend to be higher for processed products than for unprocessed fish as developed countries tend to encourage trade in raw material rather than in processed products where the greatest economic returns are. Non-tariff barriers relates to hygiene and food safety, in particular sanitary, traceability and quality control aspects.

### Fisheries and International Agreements

The United Nations<sup>2</sup> and the World Trade Organisation (WTO) are responsible for the international legal and policy frameworks that define how fisheries may be exploited and fishery products may be traded. The WTO and the United Nations provide respectively the institutional structure and legal basis for international trade liberalisation and the legal basis for the sustainable development, responsible production and management of fisheries resources.

This potentially brings the conservation instruments of the United Nations and the trade liberalisation processes of the WTO into conflict<sup>3</sup>. Further reduction and elimination of tariffs and non-tariff barriers as promoted by the WTO have implications for the sustainability of fish stocks.

### Fisheries current status in the WTO and the Doha Round

Fisheries and fish products are treated as an industrial sector and industrial products respectively by the WTO and are regulated by the GATT and not the Agreement on Agriculture.

### Box 1 : The multilateral agreements on trade relevant to fisheries are:

The multilateral agreements on trade in goods under the GATT/WTO relevant to fisheries are:

- Marrakech Protocol to the General Agreement on Tariffs and Trade (GATT) (1994)
- Agreements on Non-Tariff Barriers
- Agreement on Sanitary and Phytosanitary Measures
- Agreement on Technical Barriers to Trade
- Agreement on the Implementation of Article VI of the General Agreement on Tariffs and Trade (1994) - Anti-dumping
- Agreement on Import Licensing Procedures
- Agreement on Subsidies and Countervailing Measures
- Agreement on Safeguards

The WTO deals with fisheries at five different levels:

- Market access for non-agricultural products (where the objective of the Doha Round is the reduction and elimination of tariffs and non-tariff barriers, particularly on products of interest to developing countries);
- Agreement on subsidies and countervailing measures. The Doha Round called for negotiations to clarify and improve WTO disciplines on fisheries subsidies, taking into account the importance of this sector to developing countries;
- Trade and the environment, particularly as regards multilateral environmental agreements and environmental labelling;
- Dispute settlement procedures;
- Technical assistance and capacity building.

### Provisions on fisheries in the Cotonou agreement

The Cotonou Agreement deals with fisheries under:

- the trade provisions of the Cotonou Agreement;
- the provisions dealing with fisheries agreements.

### The Trade Provisions of the Cotonou Agreement

The terms and conditions for the export of ACP fish and fishery products to EU markets are determined by the Cotonou Agreement (CA), assuming that the rules of origin can be met. The market-access provisions of the CA are based on the non-reciprocal trade preferences extended to ACP countries under the earlier Lomé Convention. These allow ACP countries to export their fish products to the EU without paying the import taxes applied to fisheries exports from other countries.<sup>4</sup>

### Cotonou and provisions dealing with Fisheries Agreements

Article 53 of the CA on Fishery Agreements stipulates that:

- The Parties declare their willingness to negotiate fishery agreements aimed at guaranteeing sustainable and mutually satisfactory conditions for fishing activities in ACP States.
- In the conclusion or implementation of such agreements, the ACP States shall not discriminate against the Community or among the Member States, without prejudice to special arrangements between developing States within the same geographical area, including reciprocal fishing arrangements, nor shall the Community discriminate against ACP States.

### Box 2 : What are ACP-EU Fisheries access agreements?

In the mid-1970s an increasing number of coastal states established Exclusive Economic Zones<sup>5</sup> (EEZ) by extending their jurisdiction out to sea from 3-12 to 200 nautical miles. This brought almost 90% of the world's exploitable fish resources under the control of coastal states. The fleets of the EU member states, which had traditionally fished in the waters of other countries, suddenly found themselves barred from them. To ensure continuity of access for their fleets, fisheries agreements were concluded between the EU and the third countries concerned.

Currently, the EU has 18 fisheries access agreements with ACP countries. In exchange for financial compensation provided by the EU, ACP states allow EU fleets access to their surplus resources (in theory those that are not exploited by the coastal state). Since 1994,<sup>6</sup> and as part of the compensation payments, provisions were included in the fisheries access agreements to address such development issues as fishery management and regulation, support to the small scale fisheries sector, local landings etc.

### ACP-EU Fisheries (Partnership) Agreements and their influence on ACP-EU fish trade

ACP States have netted considerable financial benefits from the compensation payments made by the EU through bilateral fisheries access agreements, in excess of the value of aid disbursements to the fishing sector. Fisheries agreement negotiations therefore dominate the EU-ACP fisheries relations. However, questions have been raised about the sustainability of such agreements signed with countries where resources are already fully or over-exploited.

To address these concerns, in June 2004, the EU Council adopted conclusions on an Integrated Framework for Fisheries Partnership Agreements (FPAs) with Third Countries. Through FPAs, the EU is proposing to change its approach to bilateral fisheries access agreements, particularly with ACP countries, in order to contribute to responsible fishing in the mutual interest of the Parties concerned. FPAs aim both to ensure that the interests of the EU distant-water fleet are protected and to strengthen conditions necessary to achieve sustainable fisheries in the waters of the partner country.

As exemplified by the latest EU-Morocco fisheries partnership agreement, signed in July 2005, EU compensation will also help create a favourable environment (resources management, research, control, etc) for the EU fishing fleets activities, which may increasingly take place under joint ventures with local partners.

### Relevance of fisheries to the ACP countries

The EU provides ACP States with their most lucrative markets for fish, accounting for around 75 % of ACP fishery exports by value.

Fisheries products are one of the few areas where ACP countries have seen their participation in world trade increase. In 2003, the value of ACP fish exports to the EU exceeded 1.74 billion Euros (1.21 billion euros worth of unprocessed fish and 0.53 billion euros worth of processed fish).

The main ACP fish exports are:

- Fresh, chilled and frozen fishery products; these account for about 60 % by volume and about 50 % by value of ACP fish exports;
- Canned fish, which accounts for about 20 % by volume and 18 % by value;
- Canned or frozen shellfish (crustaceans and molluscs), which account for about 11 % by volume and 30 % by value of ACP fish exports;
- Dried, salted or smoked fish, accounting for 4 % by volume and 3 % by value.

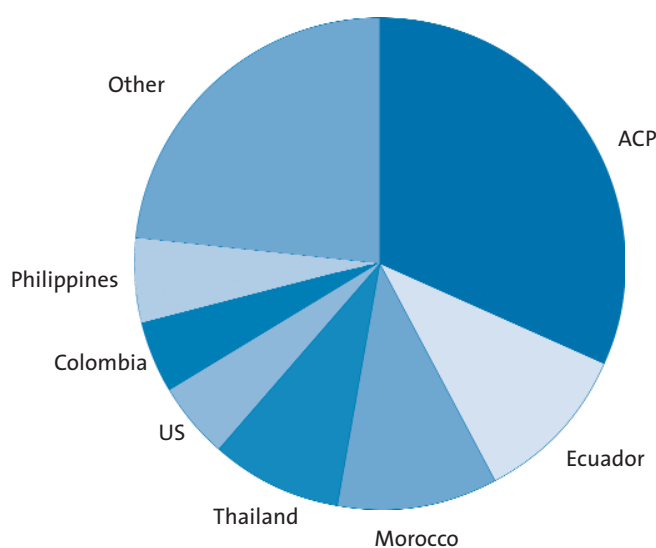
### Key fisheries issues for ACP countries

At ACP level, there is considerable scope for improving the contribution of fisheries to poverty reduction strategies. An important aspect to be noted is the central role that ACP artisanal fisheries sector activities play in food security, job creation and, increasingly, foreign exchange earnings.

ACP countries are therefore faced with a double challenge:

- the sustainable management of their fisheries resources and increasing and

2003 EU imports of processed fish in value (%)

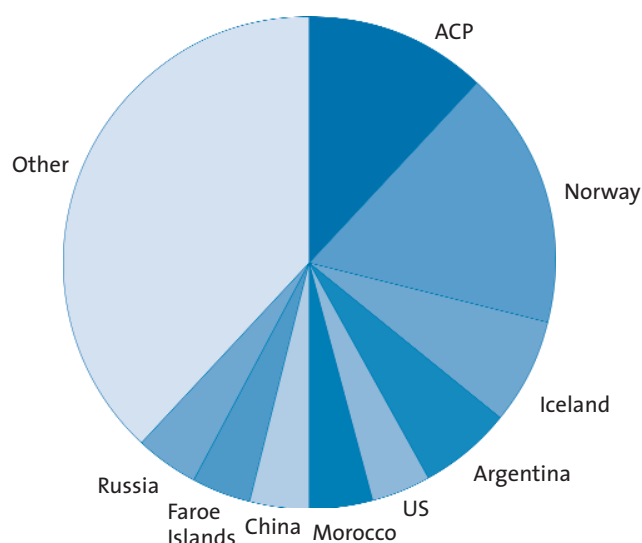


Country(ies) Share of the EU imports of processed fish in value (in %)

ACP	33
Ecuador	11
Morocco	11
Thailand	9
US	4
Colombia	4
Philippines	4
Other	24

With Total value of imports of processed fish into the EU in 2003: 1.6 bn euros

2003 EU imports of unprocessed fish in value (%)



Country(ies) Share of the EU imports of unprocessed fish in value (in %)

ACP	12
Norway	17
Iceland	7
Argentina	6
US	4
Morocco	4
China	4
Faroe Islands	4
Russia	4
Other	38

With Total value of imports of unprocessed fish into the EU in 2003: 9.87 bn euros

Source: Mackie (2004)

- redistributing the benefits derived from these resources.

### Sustainable Management of fisheries resources

The key issue in fisheries for ACP countries today is declining fish catches due to over-fishing by both national and foreign fleets. Many ACP countries also suffer from "IUU" (Illegal, Unregulated and Unreported) fishing activities. IUU fishing has important ecological as well as socio-economic impacts.

A recent report,<sup>7</sup> based on case studies from 10 ACP coastal countries, estimates that the average value of IUU catches in these countries is 23% of the value of declared catches.

### Creation and redistribution of benefits from fisheries resources

To be able to draw benefits from fish resources, provided they are managed in a sustainable way, ACP countries are also faced with issues concerning value adding and market access

#### (a) Value adding

In the case of ACP small scale processing activities, adding value operations also serve to increase the shelf life of the fish products, making it more transportable and therefore more accessible to, for example, inland populations.

In most ACP countries there is a need for investment in infrastructure - basic infrastructure (water, electricity) as well as fish processing infrastructure - in order to increase the value derived from fishery resources. Improving the returns from value adding processing demands an understanding of the markets and their dynamics at both regional and international levels, as well as the facilitation of regional integration in ACP states.

#### (b) Regional market access

The potential of regional fish trade among ACP countries is yet to be fully realized. It should be encouraged through a gradual dismantling of existing barriers, including the lack of transport infrastructure, import tariffs and burdensome bureaucratic measures.

#### (c) EU Market access

##### (i) Tariffs elimination - Erosion of ACP margins of preference

It is likely that under WTO rules, import duties on fish and fishery products will be further reduced over the years. As a consequence, ACP countries margins of preference will be eroded.

In the case of the EU, the main ACP trading partner for fisheries products, trade negotiations may provide longer implementation times for the liberalization of fish trade or mechanisms for compensation. Reducing tariff escalation between raw fish and processed fish products is also needed.

##### (ii) Technical Barriers - Sanitary and Phyto-sanitary issues

Non-tariff barriers, particularly Sanitary and Phyto-sanitary measures (frequently linked to technical standards or procedures), increasingly present obstacles to ACP exports.

##### (iii) Rules of Origin (RoO) requirements

Duty-free access for ACP exports is qualified by the rules of origin applied to

**Table 1: Overview of EPAs and related fisheries issues**

EPA regions	% of total EU fish imports (in value, 2003)
ECOWAS + Mauritania	38%
ESA	32%
SADC	25%
Caribbean	3%
Pacific	1%
CEMAC	1%

Source: Mackie (2004)

fishery products under the Cotonou Agreement (Protocol I, Annex V). To obtain duty-free access, ACP fishery products must be 'wholly obtained' in the ACP state concerned, as defined by Article 3. The main criteria for defining "originating products" are registration and flag, ownership and crewing arrangements on the fishing vessels and factory ships, which basically must be either European or ACP, therefore discriminating against third countries.

The restrictions imposed by the rules of origin have for long been a source of contention in EU-ACP fisheries relations, in particular with respect to the valuable tuna fishery. The way "originating fish" is defined effectively forces ACP processors to purchase from EU high priced suppliers (as they do not have their own tuna fleets and fish from third country vessels is not 'originating'), in order to produce originating tuna products.

This limits the expansion of ACP processing activities by restricting their possible source markets for raw products and creates an incentive for ACP States to grant EU vessels preferential access to their EEZs so as to ensure that their tuna canneries are supplied with "originating tuna".<sup>8</sup> The preferential margin offered to the ACP States for originating canned tuna (and the relatively high price they pay for the raw material) could therefore be considered as a form of upstream subsidies to EU vessels via fishery access agreements rather than a trade concession to ACP States. The ACP countries have demanded that all catches done in their waters (i.e. within their national jurisdiction) should enjoy originating status regardless of ownership of the vessel. To date however, the EU has failed to respond to these ACP requests.

### **Impact/relevance for specific ACP sub-groups**

In order to define pertinent ACP sub-groups, it is useful to consider various issues:

- *Nature and extent of fisheries resources:* This will often vary according to the geographical area. The main ACP commercial fisheries resources include demersal<sup>9</sup> species - in particular shrimp and cephalopods (octopus and squid); and pelagic<sup>10</sup> species, in particular tuna, sardines, sardinellas, etc).

Rich fishing grounds attract the interest of distant water fishing fleets, like the European, that will try and get access to them through, for example, the signing of fisheries agreements.

ACP countries with rich fishing grounds are also, in most cases, important partners for fish trade with the EU, as reflected in the shares of EU import from the various EPA regions.

- *Profile of the national fisheries sector:* The importance of small-scale and/or large-scale fishing and/or processing sectors varies for different ACP States. On one hand, these ACP fishing/processing sectors will be interested in being able to export to the EU, Asian and other markets. On the other, there may be some conflicts of interest concerning access to fish resources between national fleets and the EU and other foreign distant water fleets.

Taking note of the above, it is possible to categorize ACP states according to the common issues they share in their fisheries relations with the EU.<sup>11</sup>

### **Countries with an ACP-EU fisheries agreement**

Depending on the type of fish resources, two kinds of access agreements have been signed by the EU with ACP countries: tuna agreements and mixed<sup>12</sup> agreements.

### **Issues arising for countries having signed a Tuna Agreement with the EU**

The tuna species of greatest commercial importance are highly migratory, and move between waters under the national jurisdiction of some coastal ACP States and international waters. This migratory habit provides considerable challenges for ACP States, particularly for small islands with large Exclusive Economic Zones (EEZs), in terms of monitoring and controlling the activities of EU (and other foreign) vessels, and verifying whether the catches of tuna are being made within or outside their respective EEZs. As the compensation payments made through the ACP-EU tuna fisheries agreements are set, pro rata, according to the level of catches made, this may create an incentive for vessel operators to under-report their catches.

Generally, the EU tuna fleet operating under ACP-EU tuna fisheries agreements does not compete with local ACP fishing fleets, either on markets or fishing zones. However, some technical developments in the artisanal fishing sector (in Senegal, in the Pacific) allowing small scale rafts to fish up to the high seas, may increase such competition in the future. The sustainability of tuna fishing operations has been questioned, particularly in the case of operations using purse seines<sup>13</sup> and fish aggregating devices<sup>14</sup>, as these tend to take significant levels of by-catch and juvenile tuna.

*ACP countries with tuna fisheries agreement with the EU are mainly from two regions: (i) the Indian Ocean where the fisheries relations with the EU are based on tuna agreements ( Comoros and Seychelles, in 2004 each signed an FPA with the EU); and (ii) the Pacific Ocean, where Kiribati, the Solomon Islands and the Federated States of Micronesia (FSM) have signed tuna fisheries agreements.*

### **Issues arising for ACP countries having signed a mixed agreement with the EU**

The main ACP region where mixed agreements have been signed is West Africa (agreements with Mauritania, Senegal, Guinea Bissau, Guinea, Ivory Coast, and Gabon).

Here EU fishing operations may compete directly with local ACP fishing sectors both for resources and markets, and this raises a number of issues:

- by-catch and its utilisation;
- access to the EU market; and
- capacity for monitoring, control and surveillance (MCS).

From an economic point of view, by-catch of valuable non-target species by EU vessels represents an economic loss to the ACP States. From a social and economic point of view, landings of low value non-target species may disrupt local markets and

undermine the economic viability of local artisanal fisheries. From a conservation perspective, high levels of by-catch may damage the ecosystem and undermine sustainability.

In some cases ACP States fish catching and processing sectors compete directly with EU fishery enterprises for access to lucrative value-added export markets. In such cases, particularly where there is resource scarcity and over-fishing, ACP States may find the costs of compliance with EU hygiene and food safety regulations too high. They may therefore have no choice but to enter into fisheries agreements.

Many West African states have important small-scale fisheries, providing an important source of livelihood and food security. There is evidence<sup>15</sup> that EU and other foreign fishing activities compete both directly (for space and resources) and indirectly (for markets) with these ACP industries.

The West African fishing grounds provide the basis of the so-called "pay, fish and go" EU-ACP fisheries agreements<sup>16</sup> that are, with notable exceptions (Cape Verde has a tuna agreement with the EU), mixed agreements. The proximity of the EU (notably the port of Las Palmas in the Canary Islands) means that EU fishing fleets prefer not to land their fish locally. This in turn means that local landing provisions set up in the access agreements<sup>17</sup> are either not respected, or that only lower quality fish is landed.

### ACP countries with no access agreements

Insufficient mutual interest for establishing EU vessels access to some ACP coastal countries' resources explains why these ACP states have no fisheries access agreements. In the case of South Africa, Namibia or Angola, the ACP State refused to sign a fisheries agreement, preferring another basis for its relations with the EU. For the Caribbean, instead, the limited fishery resources means that EU vessels have little interest in access agreements.

### Key issues where broad all-ACP consensus could be built

Areas where broad ACP consensus could be built in fisheries have been explored at various recent occasions.<sup>18</sup> They include:

#### A. The need for improved fisheries management

Two particular aspects where consensus could be reached are:

#### (1) Fisheries Research for sustainable management of resources

Given the scarcity of human and financial resources in ACP countries, fisheries research needs to focus on providing information to be used for fisheries management, both at ACP national and regional level. This practically oriented fisheries research must contribute to formulating the regulatory mechanisms necessary for adjusting fishing capacity in line with available resources and stock productivity. It should also help address policy issues arising for the sector, such as the allocation of access rights to resources and the integration of artisanal fisheries into national economy.

Common challenges include: primary data collection (quality and quantity); the development of an understanding of marine eco-systems, and an ecosystems approach to fisheries management; harmonisation of systems for data analysis at regional level, and the capacity to disseminate the research results on a regular basis; the incorporation of social, environmental and economic data into fisheries analysis and management decision taking; the setting up of structures and mechanisms to enable dialogue between researchers, fishery managers and the professionals (in particular the men and women from coastal fishing communities).

#### (2) Monitoring, Control and Surveillance

Many coastal ACP countries have sizeable EEZs to police, particularly island states. But they often lack the capacity to do so in an efficient way. This leads to IUU (Illegal, Unreported, Unregulated) fishing. It also creates difficulties for ACP states to assess the quantities and value of the fish caught by local and distant-water fishing fleets in its EEZ.

The harmonisation of measures to fight IUU fishing at regional level is a priority for most ACP coastal countries: agreement on the right to pursue,<sup>19</sup> joint surveillance missions, regional register of offending fishing vessels, harmonisation of legislation on technical measures.

#### B. The need to create an enabling environment for maximising benefits from the fisheries sector

Particular attention needs to be given to small and medium scale enterprises (SMEs), including the artisanal sector,<sup>20</sup> both in the catching and processing sub-sectors, as these SMEs form the vast majority of ACP enterprises in the fisheries sector.

Two aspects deserve special attention:

#### (1) Improvement of value adding operations

In general, ACP countries have an interest

in developing joint ventures with European operators in fish processing, in order to create a local added value, rather than develop projects in the catching sector. Through joint ventures Europeans can bring capital and know-how, needed to create new processing plants or rehabilitate existing ones.

#### (2) Improving access for ACP fish products to EU markets

There is a general ACP concern that, as preferences are eroded,

- Some EU tuna fleets may be replaced by other fleets with low running costs and poor labour conditions, which tranship on the high seas, and therefore do not land in ACP harbours.
- ACP States, especially small island states, would be the net losers as they will not be able to compete, and the value adding will be done elsewhere.

### Key issues where divergences are likely to exist between ACP countries

Key areas of divergence between ACP countries will depend on:

- the extent to which ACP populations depend on fishery resources for food and livelihood, and the extent to which ACP States depend on the foreign exchange earnings from the fishery.<sup>21</sup> It also depends to a large extent on revenues from fisheries agreements and fish exports for debt service. Senegal is highly dependent on fish as a source of food and needs to balance its requirement for foreign exchange from fish exports and fishery access agreements with the requirements of its population for fish as food and livelihood;
- the nature of the fishery resources. Some countries, like Cape Verde, have rich tuna resources. Others, like Senegal, have a rich variety of other resources. The nature of the resource and the state of stocks will determine the level of interest by the EU for a fisheries agreement, thus necessitating different approaches to negotiating with the EU;
- the policy decisions of the ACP State with regard to the development of the local fisheries sector, and in particular the attitude on value added processing. Several ACP States have invested in tuna canning and other export-oriented processing operations. Yet other ACP States have formed joint venture arrangements.
- the response of ACP States to the RoO established by the EU. In many ACP States the local fishing sectors are either not capable of catching fish to the specifications required by export markets, or

are not geared up to process it. These countries, particularly those with tuna canning industries, have to rely on EU vessels to catch the fish and EU based companies to process the catch ashore. Such countries may take a laissez-faire approach to negotiations on RoO. Others, who want to develop their fleets and the fisheries within their EEZs may want to re-negotiate RoO so that any locally processed fish that is caught within their EEZs (and not just that caught by EU Member State or ACP State vessels) qualifies for originating status.

### *In short....*

In their fisheries relations with the EU, ACP countries are faced with a double challenge: managing their fisheries resources sustainably and increasing/redistributing the benefits derived from these resources. Issues to be resolved in this context include: organisation of the access to ACP fish resources for the various users, fight against IUU fishing, the improvement of regional market access for fisheries products, sanitary and phyto-sanitary issues, rules of origin requirements, etc.

The high diversity of ACP fisheries profiles (nature and extent of their resources, development of the national fisheries sector, political priorities) have resulted in a variety of fisheries relations with the EU, depending often of the interests of EU fleets to access ACP resources through fisheries agreements.

Taking into account this diversity of relations, it's however possible to define key issues where all-ACP consensus could be built, such as the need for improved fisheries management (research, Monitoring, Surveillance and Control) and the need to create a favourable environment for the profitable exploitation of their resources (improvement of value adding operations, improvement of ACP fish products' access to EU markets).

One needs also to recognise that divergences may arise between ACP countries, on issues such as the signing of access agreements with the EU, the choice of development model for their national fisheries, the review of the RoO.

## Relevance of fisheries to the EU and its likely position

### *Key issues for the EU in fisheries<sup>22</sup>*

The two main features of EU fisheries of relevance for ACP States are:

- (1) resource depletion in EU waters, where there has been a failure to achieve a sustainable balance between resources and their productivity on the one hand and fishing effort on the other; and
- (2) increasing EU dependence on external fish supplies to meet the demands of both its market (processing and consumption) and fishing sectors (employment and investment).

These two trends are the main forces driving EU external fishing policy, which in the case of ACP countries relates to the need of gaining access to ACP fishery resources. The fishery situation in the EU today therefore is both potentially promising and perilous for ACP states.

Today about 60 % of fish consumed or processed in the EU comes from outside EU waters. The growing demand for fish is for both quantity and quality. Food safety standards have been established, and strict controls are applied to ensure compliance with sanitary and phyto-sanitary standards. These standards provide a strong check on the potential for ACP States to benefit from any value addition to its fishery products, as such costly standards may encourage the cheaper export of fish in a raw or semi-processed form only.

### *Key fisheries provisions in existing EU agreements<sup>23</sup>*

Existing EU agreements address 3 main issues:

- (1) Fishery access for EU vessels (as in the case of all bilateral fisheries agreements/fisheries partnership agreements);
- (2) Market access for Third Country products on the EU market (as in the case of the EU-RSA TDCA agreement, and the EU-Mexico and EU-Chile agreements);
- (3) Reciprocal arrangements for investment in fishery enterprises (as in the case of the Chile Association Agreement).

Until recently, there was no direct linkage between agreements negotiated for fisheries access and agreements governing trade relations. Whilst successive Lomé Conventions and the Cotonou Convention contain provisions on fisheries agreements, these are not tied to the market access conditions for ACP States. However, in its most recent free trade agreements with countries that have important fisheries resources (RSA and Chile) the liberalisation of trade in fish-

eries products is linked to the opening up of third country waters to EU fleet access (through fisheries agreements and/or investment).

### **Bilateral fisheries agreements**

As part of the compensation payment negotiated under bilateral fisheries agreements, a certain proportion may be set against mutually agreed "targeted actions". These often include a number of important management and research provisions, and also occasionally provisions for fishery development (artisanal fisheries, up-grading fish processing to comply with EU standards etc). However, there is no obligation on the part of the ACP State to report on how these funds are spent.

This lack of transparency is a major constraint to promoting good governance and to ensuring that fishery development objectives are met. To date no bilateral fisheries agreement has included provisions for trade in fishery products.

### **The Euro-Mediterranean Association (MED) Agreements**

Since the first Euro-Mediterranean Conference held in November 1995, the EU and 12 Mediterranean countries have been involved in talks on 'Association Agreements'. To date, ten bilateral Association Agreements have been concluded with ten countries: Turkey (1995), Tunisia (1995), Israel (1995), Morocco (1996), Jordan (1997), the Palestinian Authority (1997), Algeria (2001), Lebanon (2002), Egypt (2004), and Syria (initialled 2004, pending Council signature).

In agreements covering fisheries (Algeria, Morocco and Tunisia), the main provisions are included under the broader area of Agricultural and Fishery Products or under Agricultural, Fisheries and Processed Agricultural Products. These cover two main areas:<sup>24</sup>

- (1) Liberalisation of trade in agricultural, fisheries and processed agricultural products (tariff concessions and tariff rate quota concessions).<sup>25</sup>
- (2) Co-operation in Agriculture and Fisheries, including: the modernisation of agriculture and fisheries, the development of sea fishing and aquaculture, diversification of output, promoting environmentally-friendly forms of fishing, evaluation and rational management of fish stocks, modernisation of infrastructure and equipment, co-operation on sanitary and phyto-sanitary techniques, development of packaging and storage techniques and the improvement of private distribution and marketing chains.

### The EU-Mexico Economic Partnership, Political Coordination and Cooperation Agreement (Global Agreement)

The Economic Partnership, Political Coordination and Cooperation Agreement, also known as the Global Agreement, between the EU and Mexico was signed on 8 December 1997 and came into force in October 2000.

For Mexican fishery products imported into the EU, and with the notable exception of tuna loins, tuna steaks and canned tuna (for which tariff-quota concessions apply), trade is to be fully liberalised by 2010. Likewise, tariff concessions and timetables are set for the import of fishery products from the EU to Mexico.

The Global Agreement states that: "In view of the socio-economic importance of their respective fisheries sectors, the Parties undertake to develop closer co-operation in this field in particular through the conclusion of a sectorial fisheries agreement, in accordance with their respective legislation, if deemed appropriate." To date (November 2005) no such agreement has been concluded.

### The TDCA with RSA

In the EU-RSA TDCA there is an explicit link between liberalisation of trade in fisheries products and the signing of a fisheries access agreement. Article 62 on Fisheries states that: "Co-operation in this area shall aim at promoting sustainable management and use of fisheries resources... This will be achieved by exchange of information... These arrangements will be set out in a mutually beneficial fisheries agreement which the Parties undertake to... complete as soon as possible". In Title II and Annex V it is made clear that the elimination of EU tariffs on South African fisheries exports will only come into effect once a fisheries agreement that is wholly acceptable to the EU is concluded.

### The EU-Chile Association Agreement

The FTA with Chile, signed in November 2002, is one of the most recent free trade agreements concluded by the EU. The agreement contains reciprocal provisions for the liberalisation of trade in fishery products. In the case of Chile, for most fishery products, with the notable exception of hake and some salmon and tuna products, tariff barriers are reduced to zero within 4 years, with a maximum transitional period of 10 years for 95% fisheries products exported from Chile to the EU. For the rest (hake, salmon and tuna products), a system of tariff quotas applies.

In the case of the EU, customs duties for all listed fishery products are reduced to zero on the entry into force of the agreement. There is also a similar schedule of tariff quotas established for various fresh hake products, processed salmon products (dried,

salted, smoked), and processed tuna (excluding loins) and hake products of EU origin for import to Chile.

In addition to these provisions, there is a separate Protocol on Fishing Enterprises. This establishes conditions for European investment in the Chilean fisheries sector. It sets out provisions under which the European owners of Chilean companies may register their vessels, buy licenses and quotas, and transfer vessels to Chile. The conditions are fully reciprocal for Chilean companies, according to the national laws of Member States.

### Likely EU strategy in EPA negotiations

It should first be noted that a significant complexity accompanies international fisheries issues within European Institutions. In the context of EPA negotiations, unlike general issues regarding trade in goods, DG Trade has no unique competence on fisheries matters; DG Fish is also involved.

From a fisheries point of view, the EU is increasingly dependent on external fish supplies to meet both its market (processing and consumption) and fishing sector (employment and investment) demands.

Therefore, in the context of EPAs, EU fisheries concerns that are likely to have an influence are:

- the interests of the EU catching sector for direct resource access (including investment in local fishing enterprises),
- the interests of EU processing and trade sectors for tariff free access to EU markets for both raw fish and certain value added fish products.

The European Commission did not include fisheries in its "Directives for the negotiations of Economic Partnership Agreements with ACP countries and regions", adopted in June 2002.<sup>26</sup> However, some key elements of the EU position for dealing with fisheries matters in EPAs were presented in December 2004.<sup>27</sup> DG Trade reiterated that general EPA objectives will also apply to fisheries: reciprocal market access, south-south integration, gradual integration of the ACP countries into the global economy, using trade policy as instrument for development (carefully managed reciprocal liberalisation, services and trade-related areas - e.g. SPS).

Specifically, in EPAs the focus on supporting the ACP fisheries development will be:

- Competitiveness (to manage erosion of preference) and improvements in overall trade performance;
- Improvement in supply side capacity (issues like SPS should be addressed);
- Duty-free access for fisheries products

will be maintained and there will be an opportunity to look again at rules of origin;

- Development of regional markets and regional trade (trade facilitation, customs, integrated markets).

In terms of broader EU-ACP fisheries relations, it is therefore likely that the EU will adopt a two-pronged approach. On one hand the EPA framework agreements will set out the broad conditions under which trade, development, and investment may take place. On the other the EU will negotiate separate bilateral Fishery Partnership Agreements (FPAs), which include the possibilities for public support to the transfer of technologies and vessels to the ACP countries involved. The signing of FPA may, like in the case of RSA, be part of the deal for the ACP to benefit from free access to EU markets.

Other elements will also condition the "free access" to the EU market, such as the compliance with the RoO and SPS measures. Given the importance of both catching and processing activities for certain European countries and the EU policy choices on consumers' safety, it is unlikely that the EU will agree to a substantial revision of the existing RoO and SPS conditions, though these clearly place significant constraints on the access of ACP fishery products to the EU market.

### In short....

Recent experience in South Africa and Chile suggest that the EU's negotiating strategy for fisheries in the context of EPAs will be to:

- make EU market access for ACP fishery products conditional on granting the EU access to ACP fishery resources;
- press for favourable conditions for direct EU investment in ACP fisheries sectors;

The EU is also likely to press for the maintenance of the status quo as regards the RoO, as these strongly favour their own domestic processing industries and (as noted below) confer strategic advantages to their distant water tuna fleet.

## Negotiation options for the ACP countries

The following general recommendations and specific issues should be considered.

### General recommendations

These recommendations will apply differently in different ACP contexts according to the characteristics of their fisheries and the existing fisheries relations with the EU.

#### The need for ACP to have a national/regional fisheries policy

A pre-requisite for ACP countries to enter into fisheries negotiations with the EU is to have a well defined fisheries policy, with clear priorities within their national fisheries development plans, taking into account the long term needs of the local (catching and processing) sectors. If not, then past experience shows that the local fisheries sector development will always be afforded second priority to the signing of a fisheries partnership with the EU, and short term benefits ('cash for access' arrangements) will be privileged over long term sustainable development.

Improved fisheries management in ACP countries should lead to more sustainable and equitable use of its fish resources, guaranteeing future supplies of fish to both local populations and to regional and international markets. In the future, funds paid by the EU for access to ACP fishing grounds through FPAs should also increasingly be allocated for such purposes.

#### The importance of developing an understanding of the fisheries sector and promoting fishery sector participation in the negotiating processes

ACP States should develop their fisheries based on an understanding of: the fragile nature of their tropical fishery ecosystems; the existing fishing sector and the social structure of the coastal communities that depend on fishing; the natural capital that fisheries represent, and the potential long term benefits to be realised from sustainable fisheries resource exploitation. ACP countries should therefore build up, through appropriate independent research, an in-depth understanding of their fisheries sector.

Full transparency, provision of appropriate information and well prepared participation of the local ACP fisheries sector to the negotiating process are important in promoting the sustainable development of ACP fisheries.

#### Pursue the development of a regional approach

A number of regional groupings of ACP countries<sup>28</sup> are developing a regional

approach for bilateral dealings with distant water fishing nations and access to markets for fish like the EU. These include the SADC (Southern African Development Community), the Common Market for Eastern and Southern Africa (COMESA), SRFC (Sub Regional Fisheries Committee-West Africa), and the FFA (Forum Fisheries Agency - Pacific).

Such efforts should be strengthened, taking particular account of the importance of participating in Regional Fisheries Management Organisations (RFMOs). It should be noted that not all ACP coastal countries are members of their relevant RFMOs. This is a major constraint for developing a regional approach to negotiations with the EU. In the short term, it should be a priority of all ACP coastal states to become active members in these RFMOs.<sup>29</sup>

Joint approaches for the negotiation of both EPAs and FPAs could be developed through such regional frameworks, based on the work and recommendations of RFMOs with the following objectives:

- the harmonisation of minimum terms and conditions for access for third country vessels to their EEZ (level of access, joint initiatives for fisheries management, research, monitoring and control, etc)
- the development of a common set of standards and criteria to guide the setting up of joint ventures and investments in the ACP fisheries sector. This is important because EPAs may include provisions for EU enterprises to become registered in ACP States (for both catching and processing fish) and for the transfer of EU vessels to these enterprises. The drawing up of a common code of conduct and common criteria for joint ventures and vessel transfers could greatly assist ACP states in avoiding the problems of stock depletion and fleet over-capacity, problems that beset the fisheries in the community waters of the EU.
- The elaboration of joint negotiating positions on such issues as RoO, where current arrangements discriminate against ACP States.
- Resources conservation issues

#### Specific elements to consider when negotiating fisheries aspects of EPAs

##### The need to achieve coherence between the provisions of EPAs and those of bilateral Fisheries Partnership Agreements

The signing of an FPA can have important repercussions on the trading capacity of an ACP country, and therefore on the implementation of an EPA. The following aspects in particular need to be given careful con-

sideration by ACP states in order to achieve coherence between regional EPAs and bilateral FPAs, and to secure long term benefits for the ACP coastal communities and fisheries sectors.

- The main issue in fisheries facing ACP countries today is declining fish catches due to over-fishing by both national and foreign fleets. If an FPA provides access to resources and/or ecosystems that are already fully exploited or over-exploited, it will hamper the long term prospects for resources renewal and will undermine the basis for developing sustainable trade in fish and fisheries products.
- As mentioned above, the restrictions imposed by RoO force ACP tuna processors to purchase from EU suppliers in order to produce originating products. Some ACP States are therefore encouraged to grant EU vessels preferential access to their EEZs so as to ensure that their tuna canneries are supplied with "originating tuna".
- The financial compensation of an FPA can be used to address trade related issues such as SPS. Support to fight IUU fishing, provided through and FPA, can also promote fish trade, in as much as it can help avoid trade sanctions against fishing products coming from IUU sources.

#### The basis for bilateral Fisheries Partnership Agreements

Whilst it may be possible to define some minimum general conditions for EU fisheries access to ACP fishing grounds, ACP States as a group may be better advised to negotiate the fisheries components of EPAs on a bilateral/regional basis and not a multilateral basis, given the diversity of situations.

Some common essential elements for future bilateral ACP-EU partnership agreements could be defined at regional level. Consulted on that topic,<sup>30</sup> ACP stakeholders mentioned the following:

- Sustainable exploitation of eco-systems, where the strengthening of institutional capacity for research, management, control and surveillance are particularly important.
- A more effective contribution to be provided by the EU fisheries sector for the social and economic development of ACP countries, through the creation of joint ventures, mainly for value adding activities
- Better education and training of people involved in the sector (catching and processing), on various aspects: catching techniques, hygienic handling of fish, management of micro-enterprises, but also on the importance of preserving marine environment (avoiding behaviour that causes marine pollution, like



servicing engines at sea), basic health education (HIV prevention, etc).

- Transparency and good governance
- The main aspect highlighted in the discussion was the importance of stakeholder participation in the decision making process of ACP-EU FPA negotiations, and several proposals were made to improve this, including:

Consultation mechanisms need to be set up which improve linkages between ACP administrations, researchers, the fishing sector and civil society. FPAs should support the establishment of consultative bodies for fisheries management and development. Contacts should also be established with EU consultative committees to facilitate cooperation in the area of fisheries management.

Meetings need to be organised between the ACP and EU fisheries sectors to prepare for the signing up of an FPA. The ACP sector development constraints, the access of ACP fish products to the EU markets and possible collaboration for adding value activities in ACP countries should be discussed in such forums. Such discussions need to take into account the level of development of local ACP enterprises, and recommendations arising from them should feed into official FPAs negotiations. Final agreements for an FPA should be reached with the full participation of the private sector on both sides.

#### Investment/establishment of fishery joint ventures

ACP States should carefully consider what is being proposed by the EU, in both EPAs or FPAs, for promoting fisheries sector investment and setting up joint enterprises.

From the ACP point of view, joint ventures should be promoted, "particularly in the processing sector where they offer the most potential benefits for ACP countries".<sup>31</sup>

For what concerns joint ventures in the catching sector, "the primary issue is conservation of fisheries resources and joint ventures should only be concluded when there is scientific data showing that these will not contribute to over-fishing or disrupt local harvesting, marketing and processing activities".<sup>32</sup>

However, on the EU side, the strong EU fishing industry lobby, mainly from the catching sector,<sup>33</sup> wants to secure support for establishing fishery enterprises in ACP countries in order to secure access to ACP fish resources for its vessels.

This was confirmed by the European Parliament last July, which asked for the reintroduction of subsidies for joint ventures, to be provided only for the catching sector, and the transfer of boats.

In ACP countries, investments are particularly needed in infrastructure - basic infrastructure (roads, water, electricity) as well as fish processing infrastructure - in order to increase the value ACP countries can derive from their fishery resources. The improvement of value adding operations for fish requires an understanding of the dynamics of markets, at regional and international level, and improving ACP regional integration.

The promotion of sustainable ACP-EU fisheries relations requires particular investment in:

- improving infrastructures and services to be used by EU fleets (harbour, landings, transporting the fish to the processing plants, etc)
- enhancing ACP capacity to address EU Sanitary and Phyto-Sanitary measures (SPS) and traceability requirements
- developing ACP regional market for fisheries products, and other alternatives to the European market, so that ACP exporters will be less dependant on EU markets for selling their products.

In cases where EU investment is promoted in ACP fisheries sector, it is important to develop a policy framework for the working environment and for environmental regulations (for discharges, use of toxic chemicals, antibiotics etc) in the enterprises set up. In that context ACP should look at the OECD guidelines for multinational enterprises.<sup>34</sup> These guidelines provide recommendations from governments to multinational enterprises operating in OECD member or adhering countries, such as the EU. They provide voluntary principles and standards for responsible business conduct in a variety of areas including employment and industrial relations, human rights, environment, information disclosure, combating bribery, consumer interests, science and technology, competition, and taxation.

#### Market access for fishery products under EPAs

ACP countries have to deal with market access issues both at regional and international level, in particular to access the EU market.

##### Regional Market Access

Regional fish trade in ACP countries has not yet realized its full potential. It should be encouraged with a gradual dismantling of existing barriers to trade, including the lack of transport infrastructure, import tariffs and burdensome bureaucratic measures.

##### EU Market access

- *Tariffs elimination - Erosion of preferences*  
ACP should negotiate for longer implementation periods for the liberalization

of fish trade or for compensation mechanisms. There is also a need to negotiate a reduction of the tariff escalation structure between raw fish and processed fish products, in order to lessen the impacts of the RoO on ACP fish trade capacity. This is particularly important for ACP fish products like tuna, that can't meet the rules of origin requirements, and then have to pay high tariffs.

- *Technical Barriers - Sanitary and Phyto-sanitary issues*

ACP countries and exporters should seek support for effectively implementing WTO agreements on Technical Barriers to Trade and on Sanitary and Phyto-sanitary issues.

Appropriate support should be sought from the EU, through the variety of instruments available (Development Cooperation, Centre for the Development of Enterprise and FPAs - provided this support is not linked to unsustainable levels of access to ACP fishery resources). In particular emphasis should be put on supporting small and medium scale ACP fisheries enterprises.

- *Rules of Origin (RoO) requirements*

There is a need to revise current rules of origin applicable to fisheries products in order to make them less restrictive and more development oriented. In order to be able to negotiate appropriate changes, there is a need for better interaction between ACP administrations and private sectors, and for a more proactive approach in formulating and promoting alternatives.<sup>35</sup>

## Notes

- 1 The difference between the costs of imports and the total value of exports
- 2 Through the United Nations Convention on the Law of the Sea (UNCLOS)
- 3 A recent example of such a conflict was the EU complaint to the WTO against Chile for closing its ports to EU vessels fishing in international waters. Chile responded by challenging the EU under the conservation provisions of the United Nations Convention on the Law of the Sea (UNCLOS).
- 4 The exact margins of preference enjoyed by ACP exporters under Cotonou depend on the trade regime applied to fishery products from competing countries that may benefit from specific free trade arrangements (as in the case of fish products from Chile under the 2002 Chile-EU Association Agreement), or other arrangements (including special GSP provisions)
- 5 The Exclusive Economic Zone (EEZ) is a belt of sea and seabed, of 200 nautical miles, adjacent to the national boundaries where the state claims preferential fishing rights and control over the exploitation of mineral and other natural resources.
- 6 The first targeted actions were introduced at the signing of the 1994 EU-Senegal fisheries protocol, after a strong campaigning by Senegalese artisanal fishworkers organisation, supported by European NGOs.
- 7 Review of Impacts of Illegal, Unreported and Unregulated Fishing on Developing Countries, MRAG, June 2005. Downloadable at [www.dfid.gov.uk/pubs/files/illegal-fishing-mrag-synthesis-report.pdf](http://www.dfid.gov.uk/pubs/files/illegal-fishing-mrag-synthesis-report.pdf)
- 8 See Block and Grynberg (2004).
- 9 Demersal fish species are species living close to the sea bed
- 10 Pelagic fish species are species living in the open sea, away from the sea bottom. They are often highly migratory and travel between several countries' Exclusive Economic Zones
- 11 These groupings do not necessarily coincide with existing trading blocks involved in EPA negotiations, or with UN classifications (Least Developed Countries, Small Islands Developing States). However, these groupings may have a particular relevance for negotiation of fisheries relations with the EU, as these relations need to envisage not only trade and market access issues but also issues arising from EU fleets access to ACP fish resources.
- 12 A mixed fisheries agreement establishes fishing opportunities for a variety of fish stocks, such as crustaceans, small pelagic species, demersal species and tuna
- 13 A type of fishing net used to surround and catch large schools of fish, particularly tuna species. The net (or seine) is pulled in a circle to surround the school then drawn shut at top and bottom, much like a purse.
- 14 A man-made floating object set at sea to attract pelagic fish such as tuna.
- 15 See for example OECD publication "Extracts from the Development Cooperation review series concerning policy Coherence, pg 48 [www.oecd.org/dataoecd/23/16/25497010.pdf](http://www.oecd.org/dataoecd/23/16/25497010.pdf)
- 16 Given the proximity of EU landing ports, West African fisheries access agreements have been described as "pay, fish and go", in as much as the EU fishing vessels, once the financial compensation is paid to the West African country, come to fish and go away, without landing in the ACP country.
- 17 Most of the fisheries access agreements have provisions for landings, but very seldom are these landings obligatory since there are also provisions in the agreement that allow EU boat owners to default on their obligations to land fish if they make a compensation payment. The quality of the landings is not stipulated, and EU boats tend to land lower value fish (both in quality and species).
- 18 These include an electronic consultation on ACP-EU fisheries relations, organised by the CTA in November 2004, and a ACP/COMSEC/CTA meeting on the same subject, organised in December 2004.
- 19 In this case, the "right to pursue" refers to the right granted by a government to another to pursue and apprehend vessels engaged in illegal fishing activities if and when they escape into its waters.
- 20 See FAO paper COFI/2005/5 "Supporting Small-scale Fisheries Through an Enabling Environment" [www.fao.org/documents/pub\\_dett.asp?lang=en&pub\\_id=168492](http://www.fao.org/documents/pub_dett.asp?lang=en&pub_id=168492) and comments in Samudra Magazine [http://icsf.net/jsp/publication/samudra/pdf/english/issue\\_40/art15.pdf](http://icsf.net/jsp/publication/samudra/pdf/english/issue_40/art15.pdf)
- 21 For example, although Mauritania is not a large fish consuming country, an important export oriented artisanal fishery for octopus has developed.
- 22 For EU communications in relation to fisheries relations with ACP countries see <http://europa.eu.int/comm/fisheries> or <http://register.consilium.eu.int/pdf/en/04/st11/st11485-re01.en04.pdf>
- 23 For a detailed discussion, see CFFA-CAPE (2005), Comparing EU Free Trade Agreements : Fisheries. ECDPM InBrief 6J. Maastricht : ECDPM with CTA -the Technical Centre for Agriculture and Rural Cooperation ACP-EU. [www.ecdpm.org/ftainbriefs](http://www.ecdpm.org/ftainbriefs) and <http://agritrade.cta.int>
- 24 Fisheries access to third country waters in the Mediterranean for European vessels is not an issue. The reason is that there are no 200-mile EEZs in the Mediterranean. Thus there is little need for the EU to enter into fisheries access arrangements with third countries in the Mediterranean
- 25 The fishery products to be imported to the EU free of customs duties from ACP include salmon, herrings, tunas, and various shellfish (crab, shrimps and prawns, lobster, mussels etc).
- 26 Available at [www.epawatch.net/general/text.php?itemID=71&menuID=24](http://www.epawatch.net/general/text.php?itemID=71&menuID=24)
- 27 Mackie (2004).
- 28 Either related to EPA configuration or deriving from Regional Fisheries Management Organisations.
- 29 A proposal was made by ACP participants to an e-consultation organised by the CTA in November 2004 on ACP-EU fisheries relations, that all ACP countries which have distant water fleets active in their EEZ should be automatically made members of the relevant RFMOs.
- 30 E-consultation on ACP-EU fisheries relations, CTA, November 2004. [www.euforic.org/docs/200504191217483457.doc](http://www.euforic.org/docs/200504191217483457.doc)
- 31 E-consultation on ACP-EU fisheries relations, CTA, November 2004. [www.euforic.org/docs/200504191217483457.doc](http://www.euforic.org/docs/200504191217483457.doc)
- 32 Expert meeting on ACP EU Fisheries relations- Maximising socio-economic benefits for the ACP fisheries communities, Brussels, 13-14th December 2004, CONCLUSIONS AND RECOMMENDATIONS
- 33 Interestingly, EU fish processing and marketing sectors are not very much involved in FPA/EPA negotiations, despite the fact that their interests, in some cases, may be more complementary to the ACP interests than those of the catching sector.
- 34 [www.oecd.org/departement/o,2688,en\\_2649\\_34889\\_1\\_1\\_1\\_1,00.html](http://www.oecd.org/departement/o,2688,en_2649_34889_1_1_1_1,00.html) and Foreign Direct Investment and the Environment, WWF, August 1999 [www.oecd.org/dataoecd/9/48/2089912.pdf](http://www.oecd.org/dataoecd/9/48/2089912.pdf)
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- Fishbase [www.fishbase.org/home.htm](http://www.fishbase.org/home.htm)
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### Acronyms

ACP	African, Caribbean and Pacific countries	IUU	Illegal, Unregulated, Unreported (fishing)
CFP	Common Fisheries Policy	LDCs	Least Developed Countries
EPA	Economic Partnership Agreement	MED	Mediterranean countries
EU	European Union	OECD	Organisation for Economic Cooperation and Development
EBA	Everything-But-Arms	RFMOs	Regional Fisheries Management Organisations
FAO	Food and Agriculture Organization of the United Nations	RoO	Rules of Origin
FTA	Free Trade Agreement	SPS	Standards for sanitary and phyto-sanitary measures
FPA	Fisheries Partnership Agreement	TBT	Technical barriers to trade
GRT	Gross Registered Tonnage	UN	United Nations
GSP	Generalised System of Preferences	UNCLOS	United Nations Convention on the Law of the Sea
		WTO	World Trade Organization.

### EPA InBrief series for 2006-2007

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