

Notes and comments on the ex-post evaluation of the fisheries agreement EU- Morocco

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Report C160/11



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Summary

The present report presents a summary of the content of the ex-post evaluation of the fishing agreement between the EU and Morocco (reference below), and does not necessarily reflect the views of IMARES:

Framework Contract FISH/2006/20 :

Convention spécifique n°26 : Evaluation ex-post du protocole actuel d'accord de partenariat dans le domaine de la pêche entre l'Union Européenne et le Royaume du Maroc, étude d'impact d'un possible future protocole d'accord.

Rapport

Décembre 2010

1. Constitution of the report

This report is made of 3 parts :

The first one presents the general framework : geo-politic facts about Morocco, macro-economic situation (with a particular emphasis on the importance of the fisheries sector in the economy of the country), public policies and help for development .

The second part deals specifically with the fisheries sector, describing the main management measures applicable in Morocco, the different fleets present and their catch, the state of fish stocks, the market of fish products, importance in terms of employment.

The third part, dealing with the fishing agreement, presents the terms of the agreement, its socio-economic consequences, the development of a partnership (policy, science, economy, control) and finally an evaluation of the agreements, in terms of achievements, of financial costs, relevance, and viability.

2. Relevant facts about fisheries in Morocco

Moroccan fleets:

The Moroccan fleet is composed of 18 000 vessels representing a total of 1.2 KW of power (more than French and Spanish fishing fleets combined), made of 84% artisanal, 14% coastal and 2% industrial vessels (but respectively 10%, 40% and 50% in terms of cumulated gross tonnage).

The industrial fleet is mainly composed of trawlers targeting either cephalopods or shrimps and freezing their catch. There are some trawlers targeting small pelagic fish.

The coastal fleet is divided into long liners (demersal fish), demersal trawlers (demersal fish, cephalopods, shrimps), purse seiners (small pelagic fish) and polyvalent vessels.

Catch of the Moroccan fleet :

Morocco has caught 900 000t for a value of 710M€ in 2008 (86% from artisanal and coastal fleets and 12% from industrial fleet).

The foreign fleets in Morocco:

-10 Russian pelagic trawlers allowed to fish 100 000t / year in the south of the country (little exploitation by national fleet in the south).

- 18 Japanese tuna long liners are allowed to fish (but only 1 used that right)

- the EU fleet is composed of about 80 vessels (but fluctuating from year to year). For instance the pelagic fleet varied between 0 and 9 vessels (which is still below the number of 18 vessels allowed by the agreement). Part of the EU pelagic fleet (Baltic countries and Poland) fish consecutively in Mauritania and Morocco , following the migration of the fish (horse mackerel and mackerel).

The catches of the EU fleets are on average of 44 000t, of which 94% is from industrial pelagic trawlers mostly taken in the southern part of the country (principally horse mackerel, mackerel and sardine).
-around 30 foreign vessels are chartered by Moroccan companies to fish mainly small pelagic fish in the southern part of the country (either frozen or in refrigerated sea water). The amount of catch is around 120 000t.

Fisheries management :

The fisheries in Morocco are primarily managed by a restriction of the access through the granting of fishing licences. Some species (the main one being octopus) are also managed using TACs (determined by the national fisheries institute) which are divided into quotas for each individual boat. A very modern and efficient system has been developed to follow in real time the amount of the catch landed by the fleets.

Scientific research is done by the INRH (national fisheries research institute), employing 350 people, financed by subventions from the state and taxes on fishing licences (combined : 11M€ per year). Part of the EU agreement money was used to increase INRH budget (by 20% or more in 2008-2010).

Fisheries sector policy :

A ambitious sectorial policy, based on the so-called *halieutis* strategy, has been implemented since 2009. With three objectives : i) sustainability in the fisheries, ii) optimising the fish market, iii) improving competitiveness. These three goals are to be achieved through 16 major projects.

This policy is financed by national funds and by the international cooperation, of which the sectorial support envelop from the EU agreement is one element (but also USA and Japan). However it is estimated that by 2012, Morocco will be able to utilised less than half of amount of money paid by the EU for sectorial support.

State of the stocks:

The INRH is in charge the advice on fish stocks. Stock assessment is done by the INRH and also in CECAF working groups.

Most of the stocks are either fully exploited (sardine, Atlantic mackerel, anchovy) or overexploited (sardinellas, horse mackerel, hake, octopus, shrimps). The only stock for which the catch could be increased in the sardine in the southern part of the country (which is shared with Mauritania), but which exploitation would generate catch on horse mackerel and mackerel already overexploited. Some adverse effects of fishing are the importance of discards, the catch of some endangered shark species (bottom long line) and of marine mammals (pelagic fisheries).

3. Relevant points about the evaluation of the agreement

The cost of the agreement is of 36M€ per year (of which 10M€ for the support to the sectorial policy). Besides that, it was expected that the fishing companies would pay on average 3.4M€ per year, but due to a lower than expected use of fishing possibilities, they paid only 1.9M€ .

The fishing possibilities are :

- 20 licences for artisanal seiners in the North (used at almost 100%) : corresponds to a need of andalucian seiners to continue fishing when the fishery is closed in the gulf of Cadiz.
- 30 licences for artisanal fishing vessels in the North (used at almost 100%) : for the Spanish it is close to their normal fishing grounds, for the Portuguese it represents a productive fishery, but the cost of the licences is considered to be too high.
- 20 licences for artisanal fishing vessels in the south (used at a rate decreasing from 80% to 50% between 2007 and 2009), the fishery becomes less attractive to vessels from the Canary Islands (increasing fuel price and decreasing fish price).

- 22 licences for industrial demersal fishing vessels in the south (long line and trawlers). Hardly used because too restrictive in term of vessel size and not interesting in term of potential catch (fishing allowed only below the 200m depth line) .
- 27 licences for tuna (used at a rate decreasing from 90% to 60% between 2007 and 2009) mainly by Spanish hand line fishing vessels, which number has decreased due to the restriction on blue fin tuna fishing.
- 10 licences for small pelagic fish in the south of which 1/3 for the Netherlands (variable rate of use , between 50 and 100%). There is a limitation of the catch at 60 000t/year. The Baltic countries and to a lesser extend Poland and the UK have been the most active in this fishery. The Netherlands (1 vessel) have fished only in 2009 (about 30% of the quota). NB : the access to Moroccan waters for this vessels has been forbidden after that the transmission of VMS position was interrupted (intentional or accidental?) ; this vessels was anyway not welcome in the EEZ due to its very large size (>140m : Annelies Illena). The limited rate of use of the fishing possibilities was due to already planned fishing – strategies for this fleet when the agreement started (2007) and difficulties to exchange quotas between countries. There is a waste of fishing opportunities due to these planning problems and some companies (UK) found it easier to flag ship their vessels and fish in Morocco under charter agreements.

Compliance with the agreement :

The EU fleet has respected the agreement in terms of employment of Moroccan fishermen, but the lists of the seamen employed were not transmitted to the Moroccan authorities.

However, the clause of the agreement on the percentage of the catch to be landed in Morocco was not respected by the European fleet, mostly because of a lack of appropriate landing facilities. However, the volume of the catch by the EU fleet is not substantial compared to the volume of the Moroccan catch, and the non-compliance with this obligation has very little influence on the inshore fisheries sector industry in Morocco.

Furthermore, there are some deficiencies in the declaration of the catch (declared too late, or declaration lower than the landings).

Finally, it is reported that the pelagic fleet in some cases postponed their payments to the end of the fishing season (while they should be done before) or even didn't pay (EU fishing companies still owe 1M€ to Morocco).

Employment

The agreement contributed to the employment of 780 people (80% from Andalusia, Canary Islands in Spain and Algarve in Portugal) on the EU side and of 170 people in Morocco.

Partnership :

The partnership didn't work well. In term of development /implementation of the sectorial policy, there was very little consultation from the Moroccan authorities to the EU (except for monitoring the expenses).

The scientific partnership, via the Joint scientific committee (meeting twice) did provide a platform for discussion on on-going projects and on the effort needed on specific topics, but with no added value in terms of stock assessment (as for Mauritania, overlap with the CECAF prerogatives).

The partnership for the promotion of European investments did not give any result.

Post ex evaluation of the agreements :

Was this agreement successful in terms of realisations ?

Globally disappointing : a positive side is the presence of 80 EU vessels fishing in Morocco, for most of them (Spanish and Portuguese) traditionally fishing in adjacent fishing grounds. But the volume of the catch under the agreement is relatively limited, and mostly composed of pelagic fish, which are not sold

on the EU market. Therefore the agreement did not contribute to improve the situation of the sea food market in the EU. The agreement did not help to develop substantially the fisheries sector in Morocco (low volume of the landings generated, number of seamen employed marginal compared to the Moroccan fleet). Finally, the partnership EU-Morocco for the implementation of a policy for the fisheries sector was very limited, and the envelope for the sectorial policy support was not entirely spent (even though providing a valuable complement to the INRH budget).

Was this agreement successful in financial terms ?

Very high cost for these few results. The ratio benefits/cost for this agreement is the lowest of the all existing fisheries agreements involving the EU, mostly because the fishing possibilities were not completely used. The same results could have been reached at a lower cost if the agreement were made on more limited fishing possibilities for the EU fleet (only for the under-used categories).

Was this agreement relevant ?

For the EU : except for the category 4 (demersal trawlers), the agreement was relevant since it allowed an extension to the south of the traditional fishing grounds and contributed to release the fishing pressure on EU stocks (mainly for Southern Spain, Canary islands and Portugal).

For Morocco, it seems that this agreement is not very interesting : i) most of fish stocks are already fully or over exploited, therefore there wasn't really a need to introduce a foreign fleet to exploit their resources, and ii) the financial contribution of the agreement is negligible in the state's budget (unlike for Mauritania or Guinea) and the envelop for sectorial policy support was only partially used (due to technical constraints).

Only in the case of small pelagic fish there was some need to give an access to a foreign fleet (especially for Sardine in the south which is underexploited). But this could be done (and was done previously) without any bilateral agreement, but under charter arrangements.

Viability of the agreement

The agreement contribute to the viability of some EU fleets (and the associate industry inshore). There is no substantial impact on the Moroccan fishing sector, and it results in a slight increase in fishing pressure on Moroccan fish stocks which are already overexploited.

4. Conclusion:

The report concludes that the only positive point of the agreement is that it gives fishing possibilities for 50 vessels which really needed it to continue their activity (Southern Spain and Portugal). Otherwise the results of the agreement were disappointing compared to their cost.

The next agreement needs to better adjust the fishing possibilities negotiated to the needs of the EU fleets (to avoid low utilisation rates) and give more flexibility in the way the envelop for the sectorial policy support can be used by Morocco (to avoid its under-use).

This type of fishing agreement seems to be more adapted for developing countries such as Mauritania than for Morocco whose fisheries sector industry and the sectorial policy are further advanced. But on the other hand this agreement provides a discussion framework between EU and Morocco which have already well developed interactions in sectors other than the fisheries.

Justification

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Project Number: 4308101032

The scientific quality of this report has been peer reviewed by the a colleague scientist and the head of the department of IMARES.

Approved: Mark Dickey-Collas
Senior Scientist

Signature:

Date: 6 December 2011

Approved: Dr. ir. T.P. Bult
Head of the Fisheries department

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Date: 6 December 2011