Indian Ocean Commission's Regional Fisheries and Aquaculture Strategy (2015-2025)

The role of fisheries in the regional economy

Fishery resources are one of the most important resources available to the countries of the Eastern and Southern Africa - Indian Ocean (ESA-IO) region in general and the Indian Ocean Commission (IOC) countries in particular, of great value to their food and nutritional security, livelihoods and economic growth requirements.

Two main categories of resources coexist: tuna (and associated) resources and other resources (demersal fish, crustaceans, molluscs and small pelagics). Commonly identified transnational and non-transnational fishing resources include tuna, lobsters, shrimps, crabs, bivalves, octopus, trepangs, sharks, reef species and small pelagics (e.g. mackerel). Coastal resources are considered to be over-exploited. Tuna resources, for the most part, do not show obvious signs of overexploitation, although this does not exclude the need for a precautionary approach to their management.

The cumulative domestic production of fisheries for all IOC countries is approximately 280,000 MT per year, which includes almost 130,000 MT of tuna and associated species (FAO, 2010). This level of fishery production in the IOC area does not take into account catches by foreign fleets of tuna vessels in the countries’ Exclusive Economic Zones (EEZs). Domestic fleets mainly consist of fishing units operating in coastal areas. Recently, the emergence of a domestic industrial and semi-industrial fleet targeting more oceanic resources, particularly tuna, has been observed.

Cumulative aquaculture production is around 12,000 MT per year. Madagascar is the principal contributor to this production (90%), mainly through shrimp and, to a lesser extent, carp aquaculture, if rice-fish farming is taken into consideration. Seaweed farming in Madagascar brings in more than 1,500 MT per year.

Today it is estimated that the contribution of the fisheries and aquaculture sector to regional GDP is around 5 per cent. Domestic and associated fisheries play a crucial role in food and nutrition security and poverty reduction through the creation of jobs. Offshore foreign fishing plays a significant role in terms of tax revenues and the service economy through the tuna industry.

Overall, the sector has great potential for economic and social development on a regional level. Different possible modes of operation, management and exploitation of fisheries resources are indeed transitional avenues for substantial improvement of the sector’s contribution to macroeconomic indicators. Commercial aquaculture, on the other hand, offers significant potential in terms of contributing to the economies of countries in the region.

Purpose and basis of the IOC Regional Strategy 2015-2025

The IOC Regional Fisheries and Aquaculture Strategy is a policy instrument, which aims to provide guidance and define priorities for its Member States for the management and conservation
of their fisheries resources and the sustainable development of aquaculture. The Regional Strategy also reflects the need, expressed by the countries, for enhanced cooperation to improve the management of the fisheries sector, particularly in the case of shared resources or common interests, and to realize the potential for growth and jobs related to its sustainable development. It thus lays the foundations for a comprehensive programme of regional cooperation in the fields of conservation, management and responsible and sustainable exploitation of fisheries resources as well as the sustainable development of aquaculture.

The IOC adopted a first Regional Strategy that covered the period 2009-2014. Implementation of this strategy has shown significant progress in the sustainable development and management of the sector in the IOC area. The Commission wished to adopt a new Regional Strategy for the period 2015-2025 to consolidate results and to promote a better expression of the sector’s potential contribution to the countries’ economic and social development. To this end, the IOC requested support from the SmartFish programme for the development of a new Regional Strategy through the following activities: Consultative missions to all countries in 2014 and identification of common needs; Preparation of a draft Regional Strategy by the end of 2014; Organisation of a multi-stakeholder workshop to consolidate the preliminary draft (Mauritius, February 2015); Preparation of the final draft of the Regional Strategy; Organisation of a workshop for technical validation by the relevant administrations and representatives of the sector (Seychelles, October 2015). The final document was adopted by the Council of Ministers - the IOC’s political body - in February 2016.

The context that guided the development of the new Regional Strategy encompasses the current biological, environmental, economic and social issues of fisheries and aquaculture and the priorities for the region, as well as endogenous and exogenous factors that affect the growth and sustainable development of the fisheries and aquaculture sectors.

Other elements were also taken into account in the development of the IOC’s Regional Strategy for Fisheries and Aquaculture for the period 2015-2025:

- The need for coherence with the IOC’s Strategic Development Plan (SDP) for the period 2013-2016. Approved by the Council of Ministers of 17 January 2013, the SDP affirms the need for enhanced fisheries cooperation and focuses on improving the management of common resources and greater efficiency in the fight against IUU fishing (illegal, unreported and unregulated fishing) to which the economies of countries in the region fall victim;
- The desire for an innovative approach based on more strategic planning via a process of participatory consultation (IOC-UNDP in-depth targeted action plan aimed at improving the efficiency of public action in countries of the region);
- The need for an appropriate anchor in the Pan-African Strategy in the field of fisheries and aquaculture advocated by NEPAD, which invites African countries and regional organisations, such as the IOC, to commit to reforms in the sector with regards to certain principles and objectives;
- The need to be consistent with the current strong political will to promote blue growth in the IOC area within which the sector should be a key component;
- The need for the logical alignment with activity programming, current or on-going, of Regional Fisheries Management Organisations (RFMOs) and sector development partners in the IOC area;
- The desire for other countries bordering the South- West Indian Ocean to adhere to the main principles and objectives, with a view to strengthening the relevance and effectiveness of fisheries cooperation in the ESA-IoO region.

Key achievements in the sustainable development and management of the sector

Considerable progress has been made in strengthening the monitoring of regional fisheries, through the IOC Regional Fisheries Monitoring Programme (RFMP). The organisation of joint monitoring patrols has enhanced the training of Fisheries Monitoring, Control and Surveillance Operators (MCS), improved the monitoring of EEZs in IOC countries and, as a result, has significantly reduced the risks of IUU fishing. Significant progress has also been made with the harmonization of satellite-based Vessel Monitoring Systems (VMS) and implementation of the 2009 FAO Agreement on Port States Measures to Prevent, Deter and Eliminate IUU Fishing (RFMOs, 2009).

In the field of management, numerous steps have been taken to develop and implement fisheries management plans. These steps are likely to significantly improve the conservation and sustainable management of fisheries resources. Recent and very promising initiatives in the area of participatory management of certain fisheries, including the application of seasonal closures and restricted access to resources, should also be highlighted. It should be noted that significant progress has also been made in the development of Marine Protected Areas (MPAs), which increasingly integrate more and more of the fisheries management concerns.

In the field of aquaculture, there is an emergence of commercial production systems and associated sectors, in both the marine and continental sectors (more specifically fish-farming and the rice-fish farming of carp in the Highlands of Madagascar). Species or groups of species include shrimp, sea cucumbers, mango crabs, bivalve molluscs, and certain fish species such as the tropical shad (Marine Cichlids), as well as tilapia and carp. Seafood farming is also booming.

Concerning the trade of fisheries and aquaculture products, the IOC area is faced with an increasing emphasis on the supply of exports to EU countries, and other international markets for certain products, and improving the quality of artisanal resources for national markets. Several achievements were made during the implementation of the first Regional Strategy, including: The maintenance of export levels of industrial fisheries products to EU countries; The development of new artisanal fishery product chains destined for high value-added markets (exportusurism); and, The reduction of post-harvest losses in some artisanal sectors. Results have also been observed, on a case-by-case basis, in relation to improving the quality of seafood products, which is seen as a national objective of wealth creation and food and nutritional security (training, cold chain development, improved transportation, etc.).

Furthermore, various initiatives to promote better recognition of the fisheries and aquaculture sector in national and regional strategies for food and nutrition security have also been carried out with a certain amount of success.

Key challenges

Returns from the fisheries sector, although significant, are still below the expected potential in terms of growth and jobs. This can be explained by:

- The increased overexploitation of coastal fisheries resources, resulting from a lack of access regulations (most management plans that have been adopted are open access regional) and the build-up of fishing overcapacity;
- The lack of national capacities in terms of deep sea fishing (exploitation of more oceanic resources);
- A significant level of foreign and national IUU fishing;
- Inadequate fishing agreements with foreign fleets are;
- Insufficient consideration of comparative regional advantages in the development of value chains targeting intra-regional markets and markets outside the EU;
- Insufficient funding for management services.

The development of aquaculture is still in its infancy despite its significant natural potential in the region, the emergence of different types of commercial aquaculture and increased demand for products in both domestic and international markets. Growth of this potential is also hampered by the inadequacy of the business environment (legal, fiscal, financial, etc.) and by the ineffectiveness of certain key services in relation to the development of this sector, in particular applied research and support related to aquaculture.

Research and training do not fully support public policies in the fisheries and aquaculture sector due to the low level and dispersion of the countries’ capacities and insufficient use of the possibilities offered by regional cooperation to strengthen national systems. This in an overall context of a human resources deficit in the region (researchers, engineers, specialized technicians, etc.) in relation to the needs of public and private institutions involved in the sustainable development and management of the sector.

Despite remarkable progress in regional fisheries surveillance, the conditions for strengthening and sustaining the RFMOs have yet to be met. Efforts should continue to ensure that countries are fully compliant with all the provisions contained in the MREP 2009 and related IOCT resolutions.

Many basic services in support of fisheries management, especially in small-scale fisheries (e.g. licensing, statistics, MCS, sanitary controls, etc.), are not being delivered effectively. This is due to a lack of human and financial resources available to the administrations, dysfunctions observed in governance systems and poor public-private partnerships.

National economic actors still have limited development capacities with regard to catches, recovery or trade. This is due to a lack of human capacities (entrepreneurs, seafarers and auxiliary occupations), the importance of financial, technical and/or health risks and the inadequacy of the business climate in the fisheries and aquaculture sector in general (banking, administration, regulations).

Long-term strategic vision for the sustainable development and management of the sector in the IOC area

The aim of the IOC’s Member States, through the Strategic Vision, is to: "Fully realize the sustainable and equitable growth potential of the sector (which is still poorly accounted for) and improve the accountability requirements and blue growth". This can be broken down into two long-term objectives:

1. The creation of wealth in a sustainable manner - through streamlining operations, controlling public spending so that policies (consumers of public finances) produce returns on investment and the realization of the many development opportunities in certain economic niches at different stages of the fisheries and aquaculture sectors;
2. Definition of equitable conditions for the sharing of fisheries and aquaculture resources.

In order to achieve these objectives, the strategic long-term vision is centred on five strategic components.
### Long-term Strategic Vision: Strategic Components and Sub-components

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<th>A - Strengthen fisheries governance and management systems</th>
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<td>A-1.</td>
<td>Increased awareness of the potential for sustainable growth associated with the development and management of the sector and the need for adequate and relevant public investment and funding</td>
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<td>A-2.</td>
<td>Establishment of legislative and regulatory frameworks that are better suited to the needs of fisheries management and the obligations and commitments of Member States</td>
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<td>A-3.</td>
<td>Improvement of key functions within the general administration of the fisheries sector (registration, licenses, statistics, quality control, etc.)</td>
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<td>A-4.</td>
<td>Strengthened key services to support the development and management of the fisheries sector (research, MCS, extension and communication training)</td>
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<td>A-5.</td>
<td>Accelerate the process of reforming management systems, in line with the ‘wealth approach’ advocated by the Pan-African Strategy (access regulations, clarification and security of access rights, link between MPAs and management, etc.)</td>
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<th>B - Realization of growth potential in the fisheries sector and associated activities</th>
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<td>B-1.</td>
<td>Achievement of relevant sub-sectoral strategic choices (domestication of ocean resources, development of industries and niche markets, bycatch recovery, etc.)</td>
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<td>B-2.</td>
<td>Promotion of infrastructure investments based on appropriate economic analyses</td>
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<td>B-3.</td>
<td>Improved business climate (enhanced comparative advantages of the tuna industry, promotion of new sectors, development of intra-regional trade, etc.)</td>
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|   | C - The rapid expansion of commercial aquaculture taking into account blue growth requirements and integrated coastal zone management and the promotion of public-private partnerships |

|   | D - Better consideration of the interests of the countries in the region in terms of international fisheries management and intra-regional and international trade development, in particular by strengthening the position of IOC countries in international fora and an improved capacity to comply with IOTC resolutions |

|   | E - Harmonization of policies to strengthen fisheries and aquaculture economies with national food and nutrition security policies |

### The IOC’s role in the implementation of the strategic vision

Fisheries cooperation is the only way to address the challenge of efficient fisheries governance in the IOC area and is geared towards the benefit of national economies. Economic advantages are to be found both in the reduction of individual costs of each component of the fisheries policy (pooling of costs and risks) and in the creation of specific rules for the division of benefits linked to these improvements.

Implementation of the Strategic Vision will involve the IOC playing a key role in the following areas:

- Bringing national contextual elements closer together to initiate mutually beneficial processes of cooperation and reform, taking into account that some of the national, global, or sector-specific situations appear in many similar elements in the IOC area;
- Aligning regional actions and national enhancement projects or initiatives, over time and in the allocation and management of available capacities and resources;
- Harmonization and support for preliminary capacity building in certain countries with a view to achieving a satisfactory level of efficiency in certain regional collaborative initiatives;
- Support for technical and legal workshops for the preparation of specific protocols for fisheries cooperation (e.g. strengthening and sustaining the RFMP mechanism);
- Promoting the coherence of national strategies for fisheries sector development (infrastructure, equipment, fleets, etc.) to improve their efficiency and prevent possible competition in terms of overcapacity, trade and/or outlets, comparative advantages and costs.

To enable Member States to achieve this strategic vision, the IOC has adopted an Action Plan that covers the first five years (2015-2020). The detailed action plan, together with the Strategy’s full text, is available at the following address: www.smartfish-coi.org

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Blue Tower, 5th floor, rue de l’Institut - Ebene - Mauritius
Tel: (+230) 402 6100 - Fax: (+230) 466 0160
E-mail: smartfish@fao.org - smartfish@coi-ioc.org

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Prepared by
Christophe Breuil, Consultant, SmartFish
Yann Yvergniaux, Socio-economist, SmartFish

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