

**A SURVEY OF EXTERNAL ASSISTANCE TO THE
FISHERIES SECTOR IN DEVELOPING COUNTRIES**

**1978 to 1981
(excluding global, inter-regional and regional projects)**

prepared by

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PREPARATION OF THIS PAPER

This document is a compilation of data collected from UNDP's publications, donor agencies, FAO sources and specialized economic publications. The data shown are therefore not necessarily complete but do give an indication of trends and main fields of assistance to the fishery sector of developing countries. Subjective allocations between group of activities have sometimes had to be made after a closer review of the objectives of multi-activity projects. The period of analysis is 1978 to 1981, based on information available up to March 1982.

ABSTRACT

This paper analyzes data concerning foreign assistance to the fisheries sector of developing countries from 1978 to 1981. The analysis was carried out by type of activity assisted by external donors, through technical or capital aid. Differences between regional allocation of aid and between the various donor agencies were worked out in detailed tables.

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PREFACE

The world's fisheries are in the midst of a period of radical changes. The traditional concept of open access to common property resources is being replaced by national control over waters within which are found the majority of the world's fish resources. The extension of national jurisdiction - commonly to 200 miles - thus presents coastal countries with new and unprecedented opportunities to reap fuller benefits from the living resources off their shores.

Many countries do not presently have the physical capacities nor technical expertise to take advantage of these opportunities. They lack skills in many of the different disciplines that are required for the rational management and optimum utilization of a resource. Many countries may also lack the resources of capital or trained manpower required to establish new fishing fleets, processing plants and distribution chains. External aid is therefore often needed to enhance such technical expertise, and to acquire funds for new vessels, plants and associated infrastructure.

International and national development assistance agencies have responded to this need by means of both technical assistance and capital aid projects. The UNDP and other United Nations agencies, the World Bank, the regional development banks, regional economic groups and the development aid agencies of individual states have variously contributed to this response. Few attempts, however, have been made to examine the extent and nature of this flow of aid to the fisheries sectors in developing countries.

Such knowledge would be of value to donor agencies and recipient countries alike. The FAO has therefore undertaken an extensive survey of this flow of external aid, in collaboration with development assistance agencies. The data collected through this survey are presented and analysed in this present paper. The paper confines itself to the quantitative reportage and analysis of the data collected. It does not presume to make any qualitative assessment of the effectiveness, appropriateness or, however defined, success or failure of the aid provided. It also deals exclusively with aid provided specifically for individual countries. Reference should also be made of so-called "global", regional or inter-regional technical assistance projects not covered in this study. Assistance provided through such projects is estimated to amount to some 10-20 million US\$ per year for the period under review.

As far as possible, the tabulated data is allowed to speak for itself; an attempt has been made to keep the written text and commentary to a minimum. Only the global tables are inserted in the text; the detailed tabulations are placed in the Statistical Appendix.

The data were collected from questionnaires and other correspondence from the donor agencies, supplemented by special inputs from UNDP's own data-collection system, information provided by FAO's field project staff and cross-checks and follow-ups of aid projects variously reported in the international fisheries press and elsewhere. In all, data regarding over 1,200 country-specific fisheries aid projects were collected and analysed. However, in view of the fact that in some instances secondary sources of information were used, data on bilateral assistance are not exhaustive.

The paper provides data on the external flow of aid to the fisheries sector in developing countries by donors, regions, type of project and type of country. A general summary of the data is given for the years 1974 to 1981; the detailed analyses relate to the period 1978 to 1981. For purposes of calculation, the money allocated to each project has been apportioned to each year according to the project duration.

The analysis attempts to distinguish between capital aid (projects providing loans or direct capital inputs for vessel equipment, ports, infrastructures, etc.) and technical assistance (advice and training in fisheries research, planning, production, technology, processing, etc.). Whenever such a distinction was not clearly identifiable, in terms of the financial aid channelled to one or the other, the whole amount of the project cost has been classified under capital aid. Aid provided by the UNDP and other UN agencies such as UNICEF, UNIDO, UNCDF, by the World Bank and the regional development banks is classified as "multilateral assistance". Aid provided by the development assistance agencies of individual countries is classified as "bilateral assistance". Data regarding EEC and OPEC are reported separately. It should be noted that the survey did not extend to technical, capital or other assistance provided to the fishery sectors of developing countries by private, commercial enterprises or under joint ventures.

The survey was planned and executed by Ms. Helga Josupeit, an Associate Expert assigned to the FAO Fisheries Department by the Federal Republic of Germany, under the supervision of Dr. J.-P. Troadec, Chief, Fishery Development Planning Service, and in collaboration with her colleagues in that Service.

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CHAPTER I

Introduction and General Summary

The evidence available from the survey indicates that external aid to the fisheries sectors of developing countries, in absolute terms, rose to almost U.S.\$ 400 million in 1981, representing virtually a threefold ^{1/} increase upon 1974 and 1975 (see Table 1). However, as shown in Table 2, which adjusts the year by year data to a common 1978 value basis, using the World Bank ODA deflator - the real increase in the flow of aid was much lower, i.e. about 50 percent over the eight-year period.

The major increase has been in capital aid and in particular reflects substantial investment projects by the Inter-American Development Bank in Brazil and Mexico, and by Japanese bilateral ports construction projects in the Philippines, Pakistan and Indonesia. After reaching a peak in 1979, technical assistance has declined, both absolutely and in real terms, a reflection of the generally reduced level of funds presently being made available for such kinds of projects.

The consistent and substantial increase in bilateral capital aid is particularly noteworthy. Such aid often involves the purchase of vessels and equipment produced in the donor countries, thus enabling the industry of the donor countries to participate in this form of aid. Moreover, this trend may well continue as, also following the extension of national jurisdiction by coastal developing countries, an increasing amount of payments for fishing rights is likely to be provided by means of bilateral capital aid. An example can already be found in Senegal, where the St. Louis fishing port is being built by Poland in payment for fishing rights.

^{1/} The data set out in a review of this subject in an earlier FAO paper, which was presented (COFI/78/Inf.12) to the twelfth session of the FAO Committee on Fisheries in June 1978, indicate a four-fold increase since 1973, when concessionary aid to developing countries fisheries was estimated at US\$82 million.

Table 1

Concessionary Aid to Fisheries in Developing Countries
at current values (million US\$)
(excluding global, inter-regional and regional projects)

	<u>1974</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
TECHNICAL ASSISTANCE	35.2	47.2	53.8	47.8	57.5	79.0	72.0	67.8
Multilateral	9.9	16.8	17.4	17.1	19.2	27.6	25.3	22.6
EEC	-	-	-	0.0	0.5	1.3	1.6	3.1
OPEC	0.3	0.3	0.2	0.1	0.1	0.1	0.2	0.2
Bilateral	25.0	30.1	35.8	30.1	37.7	50.0	44.9	41.9
CAPITAL AID	104.4	89.4	111.9	115.6	136.2	207.4	262.9	329.7
Multilateral	80.4	47.4	58.0	55.7	50.2	79.3	112.6	137.8
EEC	0.9	1.0	1.4	1.4	1.5	4.1	6.5	11.6
OPEC	9.7	15.0	15.5	7.0	8.9	10.1	21.7	17.1
Bilateral	13.4	26.0	37.0	51.5	75.6	113.9	122.1	163.2
Total :	139.6	136.6	165.7	163.4	193.7	286.4	334.9	397.4

Table 2

Concessionary Aid to Fisheries in Developing Countries
in deflated terms and annual variations (million US\$)
(excluding global, inter-regional and regional projects)

	<u>1974</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Technical Assistance	50.3	65.5	68.9	53.7	57.5	71.0	59.0	51.0
Annual variation (%)		+30	+5	-12	+7	+23	-17	-15
Capital Aid	149.2	124.1	143.3	129.9	136.2	186.8	215.5	247.9
Annual variation (%)		-17	+15	-10	+5	+37	+15	+15
Total :	199.5	189.6	212.2	183.6	193.7	257.8	274.5	298.9
Annual variation (%)		-5	+12	-13	+5	+33	+6	+9

OPEC capital aid to the fisheries sector was already relatively high by the mid-1970s, and after a period where OPEC support was particularly channelled through the multilateral agency of IFAD, OPEC's direct aid to fisheries has begun to increase again. OPEC development policy is to assist the poorest countries (GDP per caput under US\$ 250), both inside and outside the Arab world (e.g. Sri Lanka, Dominican Republic and others).

The further analysis which follows in this and other sections of the paper concentrates on the years 1978, 1979, 1980 and 1981, for which more detailed data are available, permitting the more accurate identification of donors, sub-regions and objectives of projects.

Table 3 presents the regional flow of fisheries assistance. Asia receives almost half of the total, Africa 25 percent, Latin America about 15 percent, Near East 10 percent, the balance to Oceania and the Caribbean. The specific attention given to Asia is understandable as fish represents in many Asian countries more than 50 percent of animal protein supplies. Asia also accounts for about two-thirds of the total fish catch by developing countries.

Table 3

Total assistance to the fisheries sector, by region ('000 US\$)
(excluding global, inter-regional and regional projects)

	<u>Africa</u>	<u>Asia</u>	<u>Latin America</u>	<u>Oceania</u>	<u>Near East</u>	<u>Caribbean</u>
1978	50,496	97,649	28,076	2,843	11,047	3,519
1979	73,429	144,361	40,507	7,305	16,077	4,582
1980	79,849	169,649	54,825	6,608	19,260	4,716
1981	98,798	184,920	57,884	8,540	40,615	6,677

In Tables 4 and 5 the aid figures are compared with different population densities and the number of fishermen in the various regions.

Table 4

Total fisheries assistance per 1,000 inhabitants, by region
(excluding China) - (US\$)
(excluding global, inter-regional and regional projects)

	<u>Africa</u>	<u>Asia</u>	<u>Latin America</u>	<u>Oceania</u>	<u>Near East</u>	<u>Caribbean</u>
1978	153	79	81	569	42	117
1979	222	117	117	1,461	61	153
1980	242	137	159	1,321	73	157
1981	299	149	168	1,708	153	223

Oceania receives more aid per caput than the other regions, which perhaps reflects the primary importance of the fishing industry in some of the countries of the region, as well as the relatively small populations of these islands.

Table 5

Total assistance to the fisheries sector
per fisherman, by region (US\$)
(excluding global, inter-regional and regional projects)

	<u>Africa</u>	<u>Asia</u>	<u>Latin America</u>	<u>Oceania</u>	<u>Near East</u>	<u>Caribbean</u>
1978	34	18	40	38	55	47
1979	49	27	58	97	80	61
1980	53	32	78	88	96	63
1981	66	35	83	114	203	89

This table shows that the Near East receives relatively more aid for each fisherman than the other regions. The figures for Asia reflect the very large number of fishermen in the region.

Further detailed breakdowns of aid flows regionally and sub-regionally, may be found in Part I of the statistical appendix (pages 31 to 41).

CHAPTER II
Distribution of Aid by Subject Matter

The analysis of aid, especially technical assistance, into sub-sectoral activities or type of project presents some difficulties. Capital aid to purchase a fishing vessel, for example, is simple to categorize; similarly, there are no problems in categorizing a one-man technical assistance project where the expert's terms of reference clearly and simply relate to, say, advice and assistance in aquaculture. Some aid projects, however, embrace within their objectives a whole range of activities, technologies and disciplines. For example, the so-called integrated fishery development projects can embrace (as illustrated by a familiar FAO/UNDP Project for Mexico) fisheries biology and research, fishing technology, marine engineering, processing and marketing and economics/planning. In preparing this section, subjective allocations have thus sometimes had to be made after a closer review of the objectives of multi-activity projects. Table 6 presents estimates of the distribution of external aid by type of project, according to 20 broad activities covered by fisheries aid projects, further aggregated in eight groups (Table 7).

Table 6
Distribution of aid by type of assistance ('000 US\$)
(excluding global, inter-regional and regional projects)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
I. Research (incl. research vessels)	18,896	30,670	34,137	52,730
Pollution control	82	338	340	339
II. Small-scale fisheries	20,676	30,745	34,079	36,590
Cooperatives	3,549	3,655	2,693	2,112
Credits for small-scale fishermen	5,071	5,946	19,448	19,448
Motorization schemes	2,721	6,602	5,387	7,920
III. Industrial fisheries	37,630	46,438	38,053	38,172
IV. Ports	28,198	26,891	40,384	73,986
Vessels	27,812	53,849	60,818	60,886
Repair yards	0	3,000	3,000	3,000
Boat building	6,798	6,901	5,805	6,305
Equipment	1,218	5,433	4,969	4,493
V. Marketing	1,879	2,699	5,312	3,342
Processing	811	1,501	1,218	3,759
Ice plants	7,596	11,937	14,096	9,684
VI. Aquaculture	15,570	29,141	43,522	52,881
VII. Advice on Economics, Planning, Institutions	2,088	3,180	2,970	2,961
Monitoring & Surveillance	5,396	5,396	8,396	3,000
Feasibility Studies	1,251	2,653	501	550
VIII. Training	6,388	9,286	9,779	15,276

Table 7

Aid allocation by groups of subjects ('000 US\$)
(excluding global, inter-regional and regional projects)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
I. Research (incl.research vessels)	18,978	31,008	34,477	53,069
II. Small-scale fisheries	32,017	46,948	61,607	66,070
III. Industrial fisheries	37,630	46,438	38,053	38,172
IV. Vessels & Infrastructure	64,026	96,074	114,976	148,670
V. Processing & Marketing	10,286	16,137	20,626	16,785
VI. Aquaculture	15,570	29,141	43,522	52,881
VII. Economics/Planning	8,735	11,229	11,867	6,511
VIII. Training	6,388	9,286	9,779	15,276

Aid for vessels, ports and associated infrastructure accounted for about one-third of total external assistance in 1981. Ports construction accounts for about half the money in this group and the supply of fishing vessels (excluding research vessels) built by developed countries for a further 40 percent. These projects are mostly bilateral capital aid activities.

There is strong evidence of policies by both donor agencies and recipients to give greater emphasis to artisanal fisheries, rather than industrial fisheries in the period analysed.

The allocations of aid for fisheries research is substantial, and accounted for 15 percent of the total aid in 1981. It includes, however, the cost of research vessels provided under fisheries assistance programmes. The analysis set out in Table 8 shows, paradoxically, that technical assistance for research has meanwhile declined.

The data demonstrate the very sharp emphasis accorded to the aquaculture sector, funds for which more than trebled from 1978 to 1981, to become the fourth major recipient group.

Processing and marketing is likely to be under-estimated since it is often an unquantifiable part of small-scale or industrial fisheries projects, and projects which deal exclusively with this aspect of the fishing industry are very few. Although still relatively small, the increasing amount of aid for training projects is an encouraging trend.

Tables 8 and 9 show the distribution of aid to the various types of projects by aid components (technical or capital aid), and by type of donors (multilateral and bilateral), in 1978 and 1981.

Table 8

Assistance to different types of fisheries projects
by aid components ('000 US\$)
(excluding global, inter-regional and regional projects)

	1978		1981	
	Technical	Capital	Technical	Capital
I. Research	17,720	1,176	11,118	41,612
Pollution control	82	0	339	0
II. Small-scale fisheries	4,754	15,922	13,189	23,401
Cooperatives	1,179	2,370	615	1,497
Credits for small-scale fish.	0	5,071	0	19,448
Motorization	589	2,132	75	7,845
III. Industrial fisheries	3,667	33,963	1,655	36,517
IV. Ports	1,186	27,012	1,530	72,456
Vessels	552	27,260	475	60,411
Repair yards	0	0	0	3,000
Boat building	5,298	1,500	3,783	2,522
Equipment	1,165	53	935	3,558
V. Marketing	1,879	0	2,312	1,030
Processing	811	0	733	3,026
Ice plants	979	6,617	0	9,684
VI. Aquaculture	8,181	7,389	19,734	33,147
VII. Advice on Economics, Planning, Institutions	2,088	0	2,961	0
Monitoring & Surveillance	0	5,396	0	3,000
Feasibility Studies	1,251	0	550	0
VIII. Training	6,088	300	7,763	7,513

Table 8 needs little commentary. The data throws light on the, by definition, inevitably heavy capital aid provided for investment in ports, vessels (for both fishing and research) and industrial fisheries, aquaculture installations and small-scale fisheries motorisation programmes.

The capital aid component in the Monitoring and Surveillance projects reflects the provision of hardware such as surveillance vessels and airplanes.

Table 9

Total assistance to different types of fisheries projects
by type of donor ('000 US\$)
(excluding global, inter-regional and regional projects)

	1978		1981	
	Multilat.	Bilat.	Multilat.	Bilat.
I. Research	4,138	14,758	13,602	39,128
Pollution control	0	82	256	83
II. Small-scale fisheries	17,126	3,550	22,937	13,653
Cooperatives	3,537	12	1,994	118
Credits for small-scale fish.	5,071	0	19,448	0
Motorization	1,989	732	4,075	3,845
III. Industrial fisheries	15,557	22,073	26,083	12,089
IV. Ports	12,451	15,747	33,816	40,170
Vessels	2,375	25,437	20,656	40,230
Repair yards	0	0	3,000	0
Boat building	657	6,141	1,205	5,100
Equipment	0	1,218	0	4,493
V. Marketing	144	1,735	0	3,342
Processing	345	466	3,673	86
Ice plants	349	7,247	109	9,575
VI. Aquaculture	10,941	4,629	36,078	16,803
VII. Advice on Economics, Planning, Institutions	1,604	484	2,186	775
Monitoring & Surveillance	0	5,396	0	3,000
Feasibility Studies	1,147	104	0	550
VIII. Training	2,942	3,446	3,267	12,009

Table 9 shows that multilateral aid in 1981 was concentrated on ports, industrial fisheries, aquaculture and small-scale fisheries; while bilateral aid gave particular emphasis to the supply of vessels, construction of fishing ports, and the supply of research vessels.

The interest of multilateral donors in small-scale fisheries has somewhat diminished during the four years under survey, while bilateral activities in this sector increased sharply. The industrial fisheries sector saw an opposite trend; the bilateral input in this category decreased by almost 50 percent, while multilateral input into the same group doubled. Both donor groups have sharply increased the aid for aquaculture activities.

CHAPTER III
Analysis of Aid by Donors

General

Donor agencies have been divided into ten groups: (i) the World Bank group with its affiliates IBRD, IDA and IFC; (ii) the Regional Development Bank Group, i.e. the Asian Development Bank (ADB), the African Development Bank (AFDB), the West African Development Bank (BOAD), and the Inter-American Development Bank (IDB); (iii) other multilateral aid of which IFAD accounts for more than 90 percent; (iv) the UN system comprising the United Nations Development Programme (UNDP), the United Nations Capital Development Fund (UNCDF), the United Nations Interim Fund for Scientific and Technological Development (UNIFSTD), the United Nations Voluntary Fund for the Decade of Women (UNV), the Freedom from Hunger Campaign (FFHC), and FAO's Money and Medal Programme (MMP), and its Technical Cooperation Programme (TCP) (the executing agencies are FAO, UNICEF, UNESCO and UNIDO); (v) bilateral Trust Fund projects executed by FAO; (vi) non-governmental organizations, mostly churches or political groups; (vii) EEC; (viii) OPEC; (ix) "TCDC" projects, i.e. aid from one developing country to another developing country; (x) direct "bilateral" aid from developed countries to developing countries.

Table 10

Total aid to the fisheries sector by donor groups ('000 US\$)
(excluding global, inter-regional and regional projects)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
World Bank	21,333	29,874	44,399	49,119
Regional Development Banks	28,445	49,928	67,401	84,142
Other Multilateral (mainly IFAD)	1,249	1,339	2,092	2,064
UN System	14,741	18,824	19,603	17,178
Trust Funds - FAO	2,018	4,238	2,350	3,334
Non-Governmental Organizations	1,101	2,237	1,855	845
EEC	2,001	5,418	8,040	14,602
OPEC	9,047	10,180	21,970	17,358
TCDC	438	438	143	3,743
Bilateral Donors	113,257	163,785	167,054	205,049
Total :	193,630	286,261	334,907	397,434

More than a half of external aid to fisheries comes from direct bilateral donors. Regional development banks are the next, and increasingly important, source of aid. Both EEC and OPEC have also substantially increased their support to the fisheries sector, while, in relative terms, aid from the UN system has declined.

MULTILATERAL AGENCIES

World Bank

Table 11

World Bank's assistance by region ('000 US\$)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Africa	4,748	4,748	4,414	3,214
Asia	11,710	13,510	25,819	24,939
Latin America	1,500	3,820	3,820	3,820
Near East	3,375	6,276	8,826	15,626
Oceania	0	1,520	1,520	1,520
Total :	21,333	29,874	44,399	49,119

The World Bank concentrates its activities in the Asian region. The Bank's assistance to the Near East region, especially Egypt and Yemen Arab Republic, has risen from 16 percent of the total in 1978 to more than 30 percent in 1981, an increase which accounts for the greater part of the recent growth in the World Bank's total support for the fisheries sector.

The area of emphasis by the World Bank has changed in recent years, from capital intensive projects, such as some big fishing harbour projects of the early 1970s, to more labour intensive projects which assist artisanal fishermen or fishfarmers (e.g., the Lake Victoria Project in Kenya, approved in 1980; the Fisheries Development Project in Algeria, still in pipeline).

Table 12

World Bank's assistance by type of project ('000 US\$)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Research	0	0	7,600	7,600
Small-scale fisheries	6,271	4,571	4,000	2,800
Industrial fisheries	1,500	5,340	5,340	5,340
Vessels & Infrastructure	10,874	14,945	18,705	22,705
Processing & Marketing	0	0	0	0
Aquaculture	2,688	4,168	8,754	10,674
Economics/Planning	0	850	0	0
Training	0	0	0	0
Total :	21,333	29,874	44,399	49,119

Ports and other capital intensive projects account for about 50 percent of the World Bank's total aid. In the period under review, the aquaculture sector, most of which at the small-scale level, has received a four-fold increase in aid and is now the second biggest object of expenditure of the World Bank's fisheries aid.

The World Bank started in 1980 a US\$ 38.0 million project in the Philippines to assist for five years fisheries research at the Philippines Fisheries Colleges.

Asian Development Bank

Like the World Bank, the ADB has recently changed the emphasis of its fisheries aid. While in the early 1970s its projects focused on marine fishing vessels and shore-based facilities, there has recently been a notable switch to inland and aquaculture activities, and from export-oriented to local food supply and labour-intensive projects. The average size of ADB loans grew from US\$ 5.9 million in 1969-73 to about US\$ 15.0 million in 1974-78, covering about a half of the total cost of each project.

Table 13

Asian Development Bank's assistance to the fisheries sector
by type of projects ('000 US\$)
(excluding regional projects)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Research	0	0	0	0
Small-scale fisheries	8,500	16,150	12,150	12,150
Industrial fisheries	3,300	3,333	3,333	3,333
Vessels & Infrastructure	600	4,563	4,400	15,900
Processing & Marketing	0	0	0	0
Aquaculture	3,122	8,640	13,640	16,005
Economics/Planning	40	144	0	0
Training	0	0	0	0
Total :	15,562	32,830	33,523	47,388

The recent increase in the expenditure by the Bank on fish ports construction reflects mainly a project in Pakistan for the amount of US\$ 30.0 million. The small-scale marine and inland fisheries sector represents in 1981 only 25 percent of ADB's total aid compared with more than half in 1978.

African Development Bank

Assistance to the fisheries sector by the African Development Bank has been very limited, amounting to about US\$ 14 million over 1978 to 1981.

At present, the African Development Bank is providing assistance to three ongoing projects: the construction of the Conakry Fishing Port in Guinea (1977), the Fishing Boat Repair Yard in Cape Verde Islands (co-financed by EEC, 1979), and the Artisanal Fisheries Project in the Comoros Islands (1980).

Inter-American Development Bank

There has been a big increase in support to small-scale fisheries by the Inter-American Development Bank. The increase in IDB's assistance to aquaculture reflects the aquaculture component of a US\$ 66.4 million project in Brazil, a small-scale aquaculture project in the Dominican Republic, and an aquaculture project in Peru, which all started in early 1980.

Table 14

Inter-American Development Bank's assistance to fisheries sector
by type of projects ('000 US\$)
(excluding regional projects)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Research	0	0	0	0
Small-scale fisheries	5,854	6,069	20,014	20,092
Industrial fisheries	5,375	5,375	5,527	11,304
Vessels & Infrastructure	0	0	414	414
Processing & Marketing	0	0	0	0
Aquaculture	133	133	2,333	2,333
Economics/Planning	521	521	479	0
Training	0	0	0	0
Total :	11,883	12,098	28,767	34,143

A major objective of the IDB is to increase the availability of food fish for the population of the region. The projects financed by the Bank involve the acquisition of 1,773 new vessels and the aim of producing 2.5 million tons of additional fish, mainly for human consumption. In line with this policy, the Inter-American Development Bank has increased aid to the small-scale fisheries sector by almost ten times, and invested money in the development of small-scale aquaculture.

The Bank has also funded a number of small technical assistance projects, totalling about US\$ 1.0 million, primarily for grants to fishermen, cooperatives or other small-scale fishermen's organizations.

Other Multilateral Agencies (IFAD)

IFAD's assistance to the fisheries sector, now amounting at about US\$ 2 million p.a., has so far been concentrated entirely upon small-scale fisheries development in Latin America and the Near East.

UN System and Trust Fund Projects

In the period under review, multilateral assistance to the individual country's fisheries sector channelled through the UN system amounted to an average US\$ 20 million p.a., of which about 80 percent represents UNDP funded projects. From a peak of US\$ 23 million in 1979, such assistance is clearly on a decreasing trend, many donor countries preferring to allocate aid resources in most cases made scarcer by unfavourable economic situations through bilateral rather than UN executed multilateral programmes.

Table 15

UN System and Trust Fund Projects fisheries sector,
by region ('000 US\$)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Africa	7,617	10,032	9,722	8,455
Asia	4,423	5,710	6,803	7,908
Latin America	2,229	2,717	2,263	1,668
Near East	837	2,378	1,511	910
Oceania	601	1,237	823	746
Caribbean	1,052	988	831	825
Total :	16,759	23,062	21,953	20,512
Global, inter-regional and regional projects	8,671	6,738	6,927	15,178
Grand Total :	25,430	29,800	28,880	35,690

Asia and Africa again are the mayor recipients region-wise, while the research sector receives the greatest allocation. Increasing attention is being given to small-scale fisheries and to aquaculture (Table 16).

Table 16

UN System and Trust Fund Projects fisheries sector,
by type of activity ('000 US\$)
(excluding global, inter-regional and regional projects)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Research	4,059	5,623	5,069	6,048
Small-scale fisheries	2,312	3,443	2,282	4,696
Industrial fisheries	1,532	2,365	1,845	590
Vessels & Infrastructure	57	160	83	83
Processing & Marketing	725	2,418	2,203	706
Aquaculture	3,487	3,883	5,482	4,278
Economics/Planning	2,127	2,746	2,340	2,186
Training	2,460	2,424	2,649	1,925
Total :	16,759	23,062	21,953	20,512

FAO is the major executing agency for this type of aid; all but US\$ 1 to 2 million p.a. is channelled through the Organization.

EEC

The regional distribution of EEC aid is influenced by the European Community's policy to direct its assistance mainly to developing countries in Africa, Caribbean and Oceania. The EEC aid in Asia is confined to the inland/aquaculture component of the second fisheries development project in Burma, to a fishing port construction project in Pakistan and a small-scale aquaculture project in Thailand.

Table 17

EEC Projects total assistance to the fisheries sector
by region ('000 US\$)
(excluding regional projects)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Africa	1,448	3,798	6,307	7,807
Asia	0	552	952	3,352
Latin America	287	462	399	399
Near East	0	0	0	600
Oceania	157	497	273	2,023
Caribbean	109	109	109	421
Total :	2,001	5,418	8,040	14,602

Table 18

EEC assistance to the fisheries sector by type of activity ('000 US\$)
(excluding regional projects)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Research	0	0	0	0
Small-scale fisheries	224	224	1,824	3,324
Industrial fisheries	0	0	0	0
Vessels & Infrastructure	0	1,640	2,022	7,084
Processing & Marketing	109	284	284	284
Aquaculture	1,126	1,545	2,698	2,698
Economics/Planning	63	613	0	0
Training	479	1,112	1,212	1,212
Total :	2,001	5,418	8,040	14,602

In 1981 EEC fisheries assistance was centred upon fishing ports construction and equipment, accounting for almost 50 percent of the total. The sharp increase of money allocated to this category from 1980 to 1981 is due to the funding of a fishing port project in Pakistan (US\$ 12.0 million), the provision of fishing vessels to Papua New Guinea (US\$ 1.75 million), a fishing harbour in Barbados (US\$ 1.25 million) and in the Yemen People's Democratic Republic (US\$ 3.0 million).

There has been a sharp increase in the EEC support to the small-scale fisheries sector between 1978 and 1981. The major projects in this category are small-scale fisheries projects in Gambia (US\$ 3.0 million) and in Guinea-Bissau (US\$ 8.0 million), and an artisanal boat building project in Equatorial Guinea (US\$ 1.045 million). Pipeline EEC projects indicate further emphasis upon the artisanal fisheries sector, especially in Africa.

OPEC

OPEC has naturally tended to concentrate its aid in the Near East region, which in 1981 accounted for 60 percent of the total; notable projects are a US\$ 14.0 million industrial fisheries project in Tunisia, in collaboration with the Arab Fund for Economic and Social Development, and a US\$ 16.2 million project to build a fishing port in Yemen People's Democratic Republic, in conjunction with the Abu Dhabi fund. Both projects started in 1981.

Table 19

OPEC assistance to the fisheries sector by region ('000 US\$)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Africa	2,700	2,708	2,107	1,907
Asia	1,400	2,525	15,431	4,991
Latin America	0	0	0	0
Near East	4,302	4,302	4,432	10,460
Oceania	0	0	0	0
Caribbean	645	645	0	0
Total :	9,047	10,180	21,970	17,358

OPEC has concentrated its aid in building ports and providing equipment, in the development of industrial fisheries and, to a lesser extent, in the finance-ment of small-scale fisheries projects.

Table 20

OPEC assistance to the fisheries sector,
by type of project ('000 US\$)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Research	0	8	8	8
Small-scale fisheries	2,245	3,370	2,725	2,525
Industrial fisheries	3,850	3,850	5,516	5,516
Vessels & Infrastructure	2,952	2,952	13,591	9,179
Processing & Marketing	0	0	0	0
Aquaculture	0	0	0	0
Economics/Planning	0	0	0	0
Training	0	0	130	130
Total :	9,047	10,180	21,970	17,358

Bilateral Agencies

The figures shown in this section are only partially official and therefore may not provide full coverage.

In the period under review and in aggregate, bilateral donors show special interest in Asia (51% of the total aid), and Africa (31%), while activity-wise fishing ports construction and fishing vessels supply have taken up 43% of the funds.

Table 21

Bilateral assistance to the fisheries sector ('000 US\$)
(excluding global, inter-regional and regional projects)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Africa	32,715	45,763	51,153	70,601
Asia	64,181	88,883	87,049	96,923
Latin America	11,513	20,656	19,928	17,744
Near East	2,533	3,121	3,766	12,294
Oceania	1,371	3,291	3,278	3,445
Caribbean	944	2,071	1,880	4,042
Total :	113,257	163,785	167,054	205,049

Table 22

Bilateral assistance to the fisheries sector,
by type of project ('000 US\$)
(excluding global, inter-regional and regional projects)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Research	14,840	25,208	21,570	39,211
Small-scale fisheries	4,294	7,210	12,202	17,616
Industrial fisheries	22,073	26,175	16,492	12,089
Vessels & Infrastructure	48,543	69,276	73,261	89,993
Processing & Marketing	9,448	13,431	18,135	13,003
Aquaculture	4,629	10,383	10,558	16,803
Economics/Planning	5,984	6,355	9,048	4,325
Training	3,446	5,747	5,788	12,009
Total :	113,217	163,785	167,054	205,049

Table 23

Bilateral assistance to the fisheries sector, by donor countries ('000 US\$)
(excluding global, inter-regional and regional projects)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Norway	17,419	17,864	16,315	14,832
Japan	27,520	28,689	35,317	74,684
Germany, Fed.Rep.	7,281	18,363	17,662	22,240
U.S.A.	1,883	3,566	4,763	10,849
Sweden	3,296	6,171	9,265	9,229
U.K.	6,205	12,638	14,371	9,530
Netherlands	14,254	17,819	15,755	9,621
Italy	206	374	214	10,649
Denmark	8,962	29,247	24,800	18,104
Canada	5,175	5,280	8,006	7,819
Spain	8,225	8,725	8,500	8,000
Australia <u>1/</u>	3,666	4,130	4,120	453
France	6,521	8,124	6,393	7,641
Other countries <u>2/</u>	2,644	2,795	1,573	1,398
Total :	113,257	163,785	167,054	205,049

1/ 1981 data are incomplete

2/ Including USSR, Poland, New Zealand and Switzerland,
for which only partial data were available

Japan has consistently been the major bilateral donor of assistance to fisheries. Denmark, Norway, the Netherlands and, increasingly, the Federal Republic of Germany have also been particularly notable bilateral supporters of developing countries' fisheries. There has recently been a marked increase in bilateral assistance to fisheries by the USA and Italy.

A further review of bilateral aid by individual donor countries follows.

Japan

Assistance by Japan, the major bilateral donor to the fisheries sector, has steadily increased over a period when more and more developing countries have extended jurisdiction over marine areas where Japanese vessels have traditionally fished. More than 90 percent of Japanese bilateral fisheries aid goes to coastal countries, and in many cases this aid has been part of a package for fishing rights. In general Japanese fisheries aid projects are well integrated. When the supply of equipment is part of the project, a training programme is normally jointly executed to teach the correct use of the equipment. Similarly Japanese motorization projects are usually accompanied by the supply of spare parts and repair training.

Table 24

Japan bilateral fisheries aid, by region ('000 US\$)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Africa	743	3,967	4,487	8,169
Asia	22,837	20,625	22,768	57,773
Latin America	3,444	3,331	5,779	5,513
Near East	0	0	480	480
Oceania	300	550	1,582	2,600
Total :	27,520	28,689	35,317	74,684

Asia has always been the main recipient of Japanese aid; in 1981, large projects in Pakistan have even more drastically increased the importance of this region. In 1981 Japanese fisheries aid to the Africa region rose markedly, when Japan started financing projects in Madagascar, Mauritius and Somalia, each amounting to US\$ 2.0 million. The Pacific Islands are also receiving more assistance from Japan, perhaps reflecting the interest of the country in tuna fisheries. In Latin America, Japanese aid is concentrated on: a fishing port building project in Guyana, fishing vessel supply to Colombia, fisheries training projects in Brazil and Mexico, the supply of a research vessel to Argentina and fisheries equipment to Ecuador.

Table 25

Japan bilateral fisheries aid - by type of project ('000 US\$)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Research	4,214	3,381	2,895	26,376
Small-scale fisheries	765	865	3,125	6,391
Industrial fisheries	11,075	11,075	0	0
Vessels & Infrastructure	9,581	9,945	24,840	36,044
Processing & Marketing	0	150	0	1,030
Aquaculture	81	1,025	1,477	2,164
Economics/Planning	196	216	437	149
Training	1,608	2,032	2,759	2,530
Total :	27,520	28,689	35,317	74,684

In 1980 and 1981, the largest part of the aid was related to the supply of research and other fishing vessels and assistance in the construction of fishing harbours, e.g. funding a fishing port (30.0 million US\$) and a survey-research vessel (US\$ 14.0 million) in Pakistan, and the provision of a research and training vessel (US\$ 18.3 million) to Thailand. The small-scale fisheries sector is now receiving increased Japanese support, especially in Africa.

Germany, F.R.

For most of the period under review the Federal Republic of Germany has been the second biggest bilateral donor to developing countries' fisheries.

Table 26

Germany, F.R. bilateral fisheries aid - by region ('000 US\$)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Africa	190	207	3,606	5,386
Asia	3,183	5,364	3,445	1,390
Latin America	2,940	11,673	9,400	8,380
Near East	468	519	519	4,618
Oceania	0	0	0	0
Caribbean	500	600	100	2,466
Total :	7,281	18,363	17,662	22,240

The German support for the Latin American fishing industry remained strong through the years under survey. Aid to Africa, where important German (F.R.) fisheries projects are still in the pipeline, and Near East, where German aid is concentrated on Tunisia, have steadily increased.

Table 27

Germany, F.R. bilateral fisheries aid - by type of project ('000 US\$)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Research	3,249	10,052	7,779	6,434
Small-scale fisheries	0	17	983	966
Industrial fisheries	719	719	190	0
Vessels & Infrastructure	500	3,463	2,963	9,918
Processing & Marketing	114	177	2,512	2,512
Aquaculture	456	1,556	456	650
Economics/Planning	2,243	2,324	2,279	1,094
Training	0	100	100	666
Total :	7,281	18,363	17,662	22,240

Denmark

Denmark has traditionally given consistent support to the development of the fisheries sector of Third World countries; it also finances trust fund fisheries projects executed by FAO. At the direct country-to-country level, Denmark has concentrated its aid on Asia.

The most important Danish fisheries projects in Asia are a vessel supply project in Burma (US\$ 29.9 million), a research and other vessel supply project in India (US\$ 15.0 million), and several fisheries projects in Bangladesh (US\$ 15.5 million). Most Danish projects relate to the provision of equipment, normally by way of soft loans.

Table 28

Denmark bilateral fisheries aid, by region ('000 US\$)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Africa	1,225	5,175	5,175	3,758
Asia	7,737	23,822	17,975	12,696
Latin America	0	0	0	0
Near East	0	250	1,650	1,650
Oceania	0	0	0	0
Caribbean	0	0	0	0
Total :	8,962	29,247	24,800	18,104

Table 29

Denmark bilateral fisheries aid, by type of project ('000 US\$)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Research	3,424	5,822	5,822	2,398
Small-scale fisheries	0	250	250	250
Industrial fisheries	0	2,717	2,717	0
Vessels & Infrastructure	2,647	15,127	10,680	10,680
Processing & Marketing	2,891	4,711	4,711	4,345
Aquaculture	0	375	375	186
Economics/Planning	0	0	0	0
Training	0	245	245	245
Total :	8,962	29,247	24,800	18,104

Norway

Norwegian policy in assistance to the development of the fisheries sector in Third World countries has been very similar to that of Denmark; direct bilateral aid by Norway has also concentrated on Asia, in particular through the provision of fishing vessels to India, Burma and Bangladesh. Norway is also a traditionally strong supporter of fisheries development via FAO - executed Trust Fund projects.

Table 30

Norway bilateral fisheries aid - by region ('000 US\$)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Africa	616	616	616	7,066
Asia	16,803	17,133	15,584	7,651
Latin America	0	0	0	0
Near East	0	115	115	115
Oceania	0	0	0	0
Caribbean	0	0	0	0
Total :	17,419	17,864	16,315	14,832

Table 31

Norway bilateral fisheries aid - by type of project ('000 US\$)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Research	1,837	1,837	1,000	1,017
Small-scale fisheries	0	330	330	330
Industrial fisheries	0	0	0	0
Vessels & Infrastructure	12,423	12,423	11,711	3,992
Processing & Marketing	2,543	2,543	2,543	2,762
Aquaculture	0	115	115	115
Economics/Planning	0	0	0	0
Training	616	616	616	6,616
Total :	17,419	17,864	16,315	14,832

Norway is assisting the fisheries training sector in Tanzania with US\$ 18.0 million, while the fisheries processing and marketing sector was supported by the provision of ice plants and other equipment to Sri Lanka and Vietnam.

Italy

Italy's bilateral aid to the fisheries sector did not exceed US\$ 300/400,000 p.a. until 1981 when the supply of fishing vessels to Somalia represented some US\$ 10.6 million p.a.

U.S.A.

The U.S. bilateral aid to the fisheries sector has increased rapidly but remains relatively small compared with other activities financed by the United States.

Table 32

U.S.A. bilateral fisheries aid - by region ('000 US\$)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Africa	221	382	1,338	3,004
Asia	873	1,306	1,829	1,648
Latin America	675	675	155	173
Near East	0	62	62	4,645
Oceania	0	0	0	0
Caribbean	114	1,141	1,379	1,379
Total :	1,883	3,566	4,763	10,849

The big increase in 1981 was primarily due to assistance in the aquaculture sector especially in Egypt. USAID aquaculture projects are also operating in Rwanda, Kenya, Lesotho, Central Africa Republic, and Zaire. Aid to the small-scale fisheries sector has increased, particularly through a US\$ 6.5 million small-scale fisheries project in Cape Verde Islands initiated in 1981.

Table 33

U.S.A. bilateral fisheries aid - by type of project ('000 US\$)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Research	101	101	101	101
Small-scale fisheries	600	662	662	2,287
Industrial fisheries	0	0	352	352
Vessels & Infrastructure	32	32	0	0
Processing & Marketing	0	0	0	0
Aquaculture	1,150	2,771	3,648	8,109
Economics/Planning	0	0	0	0
Training	0	0	0	0
Total :	1,883	3,566	4,763	10,849

U.K.

The United Kingdom directs its assistance mainly to members of the British Commonwealth. U.K. aid to Asia reflects in particular capital intensive projects in Burma, accounting for a total of US\$ 24.61 million.

In 1978 and 1979 the British fisheries aid to Africa was concentrated on the landlocked South African countries, such as Botswana, Lesotho and Swaziland - where aquaculture projects were assisted, Tanzania (small-scale fisheries), and Seychelles (tuna fishing industry).

Table 34

U.K. bilateral fisheries aid - by region ('000 US\$)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Africa	3,994	1,610	1,443	990
Asia	222	7,390	10,937	7,754
Latin America	951	1,130	381	269
Near East	334	634	311	311
Oceania	557	1,727	1,151	206
Caribbean	147	147	148	0
Total :	6,205	12,638	14,371	9,530

U.K. aid to the fisheries sector is rather widely distributed and embraces most fishing activities. The processing-marketing sector data for 1980 reflects the provision of cold-store ice plants to Burma.

Table 35

U.K. bilateral fisheries aid - by type of project ('000 US\$)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Research	407	1,599	1,862	498
Small-scale fisheries	732	1,049	1,080	1,048
Industrial fisheries	319	319	202	202
Vessels & Infrastructure	3,243	7,861	7,113	6,965
Processing & Marketing	623	603	3,305	211
Aquaculture	692	698	658	585
Economics/Planning	99	399	22	0
Training	110	110	129	21
Total :	6,205	12,638	14,371	9,530

Netherlands

Netherlands aid to the fisheries sector is highly concentrated in Asia and Africa.

Table 36

Netherlands bilateral fisheries aid - by region ('000 US\$)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Africa	4,612	7,377	4,745	2,395
Asia	8,063	8,707	9,339	6,172
Latin America	1,163	1,319	1,255	638
Near East	360	360	360	360
Oceania	0	0	0	0
Caribbean	56	56	56	56
Total :	14,254	17,819	15,755	9,621

The recent decrease of aid to the fisheries sector is due to a change in Dutch assistance policy, from large-scale fishing vessel projects to small-scale fisheries projects. The Dutch aid to the fish processing and marketing sector consists mainly of the provision of ice plants and other equipment for fish processing and storage to Cape Verde Islands.

The aquaculture sector is the second major recipient of Dutch fisheries aid in 1981; most of the assistance to this sector is concentrated on Lao, where the Netherlands are assisting several fish culture projects for a total of US\$ 3.5 million.

Table 37

Netherlands bilateral fisheries aid - by type of project ('000 US\$)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Research	96	96	56	56
Small-scale fisheries	0	66	66	674
Industrial fisheries	718	890	558	172
Vessels & Infrastructure	11,380	12,080	10,443	6,602
Processing & Marketing	1,470	3,370	3,370	855
Aquaculture	590	1,234	1,179	1,179
Economics/Planning	0	83	83	83
Training	0	0	0	0
Total :	14,254	17,819	15,755	9,621

Sweden

Swedish aid has been concentrated on Africa, and especially on Mozambique, Angola and Guinea-Bissau. Swedish fisheries aid to Asia relates mainly to small-scale fisheries projects in Bangladesh.

Table 38

Sweden bilateral fisheries aid - by region ('000 US\$)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Africa	3,062	6,061	7,361	7,361
Asia	74	110	1,904	1,868
Latin America	0	0	0	0
Near East	160	0	0	0
Oceania	0	0	0	0
Caribbean	0	0	0	0
Total :	3,296	6,171	9,265	9,229

Table 39

Sweden bilateral fisheries aid - by type of project ('000 US\$)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Research	0	666	666	666
Small-scale fisheries	474	1,843	3,637	3,601
Industrial fisheries	1,020	1,020	1,020	1,020
Vessels & Infrastructure	1,802	1,642	2,942	2,942
Processing & Marketing	0	0	0	0
Aquaculture	0	0	0	0
Economics/Planning	0	0	0	0
Training	0	1,000	1,000	1,000
Total :	3,296	6,171	9,265	9,229

Swedish aid gives special emphasis to the small-scale fisheries sector. The Swedish aid for research and training is represented by the fisheries project in Angola.

Spain

Spain's assistance to the fisheries sector of developing countries is concentrated entirely on Africa, and there especially on Senegal where US\$ 14.5 million were provided for fishing boats and equipment from 1976-1979, and on Mauritania, where US\$ 23.0 million were given for assisting the industrialization of the local fisheries.

Canada

Canada also has given emphasis in its fisheries aid to West Africa where it supported the motorization of artisanal fishing boats and fish marketing projects, especially in Senegal and the Cameroon, and the provision of monitoring and surveillance airplanes to Senegal. Latin America also receives special attention by Canada; examples are the fisheries research projects in Brazil (US\$ 3.0 million) and Peru (US\$ 1.0 million), and small-scale fisheries projects in Colombia (US\$ 7.0 million).

Table 40

Canada bilateral fisheries aid - by region ('000 US\$)
(excluding regional projects)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Africa	2,580	2,685	5,584	5,584
Asia	214	214	50	50
Latin America	2,024	2,024	2,232	2,045
Near East	287	287	0	0
Oceania	0	0	0	0
Caribbean	70	70	140	140
Total :	5,175	5,280	8,006	7,819

Table 41

Canada bilateral fisheries aid - by type of project ('000 US\$)
(excluding regional projects)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Research	196	196	404	404
Small-scale fisheries	1,563	1,668	1,668	1,668
Industrial fisheries	200	200	200	200
Vessels & Infrastructure	287	287	0	0
Processing & Marketing	1,492	1,492	1,492	1,492
Aquaculture	452	452	187	0
Economics/Planning	120	120	3,190	3,190
Training	865	865	865	865
Total :	5,175	5,280	8,006	7,819

France

France's aid policy provides for particular assistance to ex-colonies, especially in Africa, where there has been emphasis upon industrialization projects in Cameroon, Ivory Coast and Senegal. In Latin America, France is funding inland fisheries development projects in Bolivia (US\$ 0.75 million) and in Brazil (US\$ 0.58 million). The fisheries assistance in the Pacific Islands relates to research, notably Fiji, New Caledonia and Vanuatu.

Table 42

France bilateral fisheries aid - by region ('000 US\$)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Africa	6,195	7,873	5,976	6,932
Asia	0	0	8	0
Latin America	195	195	353	353
Near East	126	0	0	0
Oceania	5	56	56	356
Caribbean	0	0	0	0
Total :	6,521	8,124	6,393	7,641

Table 43

France bilateral fisheries aid - by type of project ('000 US\$)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Research	452	504	1,155	1,455
Small-scale fisheries	0	380	380	380
Industrial fisheries	2,475	3,635	3,276	2,166
Vessels & Infrastructure	2,534	2,534	201	701
Processing & Marketing	450	0	0	0
Aquaculture	484	1,071	1,373	2,939
Economics/Planning	0	0	0	0
Training	126	0	8	0
Total :	6,521	8,124	6,393	7,641

STATISTICAL APPENDIX

REGIONAL AND SUB-REGIONAL DATA

The tables which follow are based exclusively on countries' projects, thus excluding global, inter-regional and regional projects, in view of the difficulties that would have been encountered in properly allocating the aid so provided.

AFRICA

The tables below present the data for Africa according to seven sub-regions, of which the first four are sub-regions of coastal countries, the last three land-locked. The first group - North-East Central Atlantic - includes the West African coastal countries from Mauritania in the North down to Sierra Leone. The Gulf of Guinea countries include Liberia in the West and Nigeria in the East. The third group - South-East Atlantic - lists all remaining Atlantic coastal countries. The fourth group - South-West Indian Ocean - is defined as all African countries which border the Indian Ocean. In the Southern land-locked countries group Botswana, Lesotho and Swaziland are listed, while the Eastern land-locked group contains Burundi, Rwanda, Zambia, Uganda and Malawi; the remaining land-locked countries are defined as the "Central African land-locked countries".

Table AF.1

Fisheries assistance in Africa ('000 US\$), at current values

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
TECHNICAL ASSISTANCE	15,479	24,253	25,537	26,541
Multilateral	7,885	11,174	10,757	9,058
EEC	322	539	643	2,143
OPEC	100	108	108	108
Bilateral	7,172	12,432	14,029	15,232
CAPITAL AID	35,017	49,176	54,312	70,458
Multilateral	5,748	9,986	9,525	9,425
EEC	1,126	3,259	5,664	5,664
OPEC	2,600	2,600	1,999	1,799
Bilateral	25,543	33,331	37,124	55,369
Total :	50,496	73,429	79,849	98,798

Table AF.2

Fisheries assistance in Africa at 1978 prices ('000 US\$)
and annual variations (%)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Technical Assistance	15,479	21,850	20,931	19,956
Annual variation (%)		+41	-4	-5
Capital Aid	35,017	44,302	44,520	52,976
Annual variation (%)		+26	-	+19
Total :	50,496	66,152	65,451	72,932
Annual variation (%)		+31	-1	+11

Table AF.3

The subregional allocation of fisheries aid ('000 US\$)

North-Central Atlantic (Western Africa)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
TECHNICAL ASSISTANCE	6,441	7,711	8,516	10,016
Multilateral	2,912	3,750	2,741	1,967
EEC	322	322	322	1,822
OPEC	100	100	100	100
Bilateral	3,107	3,539	5,353	6,127
CAPITAL AID	17,888	27,667	29,203	25,035
Multilateral	3,000	4,738	2,500	2,500
EEC	0	1,500	3,100	3,100
OPEC	2,400	2,400	1,799	1,799
Bilateral	12,488	19,029	21,804	17,636
Total :	24,329	35,378	37,719	35,090

Gulf of Guinea

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
TECHNICAL ASSISTANCE	1,149	1,801	1,621	1,318
Multilateral	1,111	1,495	1,355	1,035
EEC	0	217	217	217
OPEC	0	0	0	0
Bilateral	38	89	49	66
CAPITAL AID	1,460	4,347	1,969	3,518
Multilateral	0	0	111	111
EEC	0	0	0	0
OPEC	0	0	0	0
Bilateral	1,460	4,347	1,858	3,407
Total :	2,609	6,148	3,590	4,836

South-East Atlantic

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
TECHNICAL ASSISTANCE	1,321	5,197	5,738	6,254
Multilateral	0	0	0	516
EEC	0	0	100	100
OPEC	0	0	0	0
Bilateral	1,321	5,197	5,638	5,638
CAPITAL AID	1,323	2,433	3,355	5,845
Multilateral	48	48	48	3,648
EEC	0	0	522	522
OPEC	0	0	0	0
Bilateral	1,275	2,385	2,785	1,675
Total :	2,644	7,630	9,093	12,099

South-West Indian Ocean

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
TECHNICAL ASSISTANCE	4,537	6,441	5,976	4,915
Multilateral	2,770	3,928	4,331	3,461
EEC	0	0	0	0
OPEC	0	8	8	8
Bilateral	1,767	2,505	1,637	1,446
CAPITAL AID	11,820	12,203	16,976	36,450
Multilateral	1,500	4,000	5,666	3,166
EEC	0	633	633	633
OPEC	0	0	0	0
Bilateral	10,320	7,570	10,677	32,651
Total :	16,357	18,644	22,952	41,365

Land-locked Southern Africa

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
TECHNICAL ASSISTANCE	97	33	33	39
Multilateral	0	0	0	0
EEC	0	0	0	0
OPEC	0	0	0	0
Bilateral	97	33	33	39
CAPITAL AID	0	0	0	0
Total :	97	33	33	0

Land-locked Central Africa

TECHNICAL ASSISTANCE	850	1,523	1,809	2,459
Multilateral	589	1,262	1,411	1,411
EEC	0	0	4	4
OPEC	0	0	0	0
Bilateral	261	261	394	1,044
CAPITAL AID	1,126	1,126	1,126	1,126
Multilateral	0	0	0	0
EEC	1,126	1,126	1,126	1,126
OPEC	0	0	0	0
Bilateral	0	0	0	0
Total :	1,976	2,649	2,935	3,585

Land-locked Eastern Africa

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
TECHNICAL ASSISTANCE	1,084	1,547	1,844	1,540
Multilateral	503	739	919	668
EEC	0	0	0	0
OPEC	0	0	0	0
Bilateral	581	808	925	872
CAPITAL AID	1,400	1,400	1,683	283
Multilateral	1,200	1,200	1,200	0
EEC	0	0	283	283
OPEC	200	200	200	0
Bilateral	0	0	0	0
Total :	2,484	2,947	3,527	1,823

ASIA

Asia has been divided into three subregions, following not only the geographical but also the aspect of the region. The first group consists of Southern Asian countries as classified in the FAO Yearbook of Fishery Statistics, but the second group - East and South-East Asia - does not include the Democratic Republic of Korea and Lao, which have been placed into the "China (Mainland) and Asia, Other group".

Table AS.1

Fisheries assistance in Asia ('000 US\$), at current values

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
TECHNICAL ASSISTANCE	26,087	30,481	29,432	22,472
Multilateral	5,542	6,911	7,641	8,098
EEC	0	350	750	750
OPEC	0	0	0	0
Bilateral	20,545	23,220	21,041	13,624
CAPITAL AID	71,562	113,880	140,217	162,448
Multilateral	26,526	45,590	58,576	71,556
EEC	0	202	202	2,602
OPEC	1,400	2,525	15,431	4,991
Bilateral	43,636	65,663	66,008	83,299
Total :	97,649	144,361	169,649	184,920

Table AS.2

Fisheries assistance in Asia at 1978 current values ('000 US\$)
and annual variations (%)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Technical Assistance	26,087	27,460	24,125	16,896
Annual variation (%)		+5	-12	-30
Capital Aid	71,562	102,595	114,932	122,141
Annual variation (%)		+43	+12	+6
Total :	97,649	130,055	139,057	139,038
Annual variation (%)		+33	+7	-

Table AS.3

The subregional allocation of fisheries aid ('000 US\$)

<u>Southern Asia</u>				
	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
TECHNICAL ASSISTANCE	14,892	15,408	12,611	7,126
Multilateral	2,844	3,921	3,652	1,964
EEC	0	350	0	0
OPEC	0	0	0	0
Bilateral	12,048	11,137	8,959	5,162
CAPITAL AID	19,227	32,352	47,282	62,921
Multilateral	10,440	16,575	20,412	30,592
EEC	0	0	0	2,400
OPEC	0	0	12,906	2,466
Bilateral	8,787	15,777	13,964	27,463
Total :	34,119	47,760	59,893	70,047

East and South-East Asia^{1/}

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
TECHNICAL ASSISTANCE	5,694	8,998	10,996	9,927
Multilateral	2,205	2,206	2,393	4,605
EEC	0	0	0	0
OPEC	0	0	0	0
Bilateral	3,489	6,792	8,603	5,322
CAPITAL AID	48,623	73,516	84,923	91,515
Multilateral	16,086	25,115	34,364	37,164
EEC	0	202	202	202
OPEC	0	1,125	1,125	1,125
Bilateral	32,537	47,074	49,232	53,024
Total :	54,317	82,514	95,919	101,442

China (Mainland) and Asia, Other

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
TECHNICAL ASSISTANCE	5,501	6,075	5,825	5,419
Multilateral	493	784	1,596	1,529
EEC	0	0	750	750
OPEC	0	0	0	0
Bilateral	5,008	5,291	3,479	3,140
CAPITAL AID	3,712	8,012	8,012	8,012
Multilateral	0	3,800	3,800	3,800
EEC	0	0	0	0
OPEC	1,400	1,400	1,400	1,400
Bilateral	2,312	2,812	2,812	2,812
Total :	9,213	14,087	13,837	13,431

^{1/} Excludes the Democratic Republic of Korea and Lao, which have been included with China (Mainland) and Asia, Other.

LATIN AMERICA

The tables which follow refer exclusively to continental countries in Central and South America. In the latter, the group of the Pacific States comprises of Ecuador, Peru and Chile, while Colombia is identified under the Atlantic coastal States.

Table LA.1

Fisheries assistance in Latin America at current values ('000 US\$)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
TECHNICAL ASSISTANCE	9,435	12,388	9,393	7,504
Multilateral	2,693	3,486	3,032	2,710
EEC	63	63	0	0
OPEC	0	0	0	0
Bilateral	6,679	8,839	6,361	4,794
CAPITAL AID	18,641	28,119	45,432	50,380
Multilateral	13,583	15,903	31,466	37,031
OPEC	0	0	0	0
Bilateral	4,834	11,817	13,567	12,950
Total :	28,076	40,507	54,825	57,884

Table LA.2

Fisheries assistance in Latin America at 1978 values ('000 US\$), and annual variation (%)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Technical Assistance	9,435	11,160	7,699	5,642
Annual variation (%)		+18	-31	-26
Capital Aid	18,641	25,332	37,239	37,880
Annual variation (%)		+36	+47	+1
Total :	28,076	36,492	44,938	43,522
Annual variation (%)		+30	+23	-3

Table LA.3

The subregional allocation of fisheries aid ('000 US\$)

	<u>Central America</u>			
	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
TECHNICAL ASSISTANCE	2,757	2,920	2,330	1,583
Multilateral	1,529	1,625	1,408	1,052
EEC	0	0	0	0
OPEC	0	0	0	0
Bilateral	1,228	1,295	922	531
CAPITAL AID	10,854	11,274	11,407	11,407
Multilateral	10,630	11,050	11,183	11,183
EEC	224	224	224	224
OPEC	0	0	0	0
Bilateral	0	0	0	0
Total :	13,611	14,194	13,737	12,990

Continued ...

South America - Pacific

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
TECHNICAL ASSISTANCE	3,316	4,226	2,174	2,062
Multilateral	194	383	313	313
EEC	0	0	0	0
OPEC	0	0	0	0
Bilateral	3,122	3,843	1,861	1,749
CAPITAL AID	3,220	6,533	8,683	11,583
Multilateral	2,820	2,820	4,970	7,870
EEC	0	0	0	0
OPEC	0	0	0	0
Bilateral	400	3,713	3,713	3,713
Total :	6,536	10,759	10,857	13,645

South America - Atlantic

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
TECHNICAL ASSISTANCE	3,172	5,052	4,699	3,709
Multilateral	970	1,478	1,311	1,345
EEC	63	63	0	0
OPEC	0	0	0	0
Bilateral	2,139	3,511	3,388	2,364
CAPITAL AID	4,567	10,312	25,342	27,390
Multilateral	133	2,033	15,313	17,978
EEC	0	175	175	175
OPEC	0	0	0	0
Bilateral	4,434	8,104	9,854	9,237
Total :	7,739	15,364	30,041	31,099

South America - Land-locked Countries

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
TECHNICAL ASSISTANCE	190	190	190	150
Multilateral	0	0	0	0
EEC	0	0	0	0
OPEC	0	0	0	0
Bilateral	190	190	190	150
CAPITAL AID	0	0	0	0
Total :	190	190	190	150

CARIBBEAN

This area covers 22 island countries and territories in the Western Central Atlantic Ocean.

Table CA.1

Fisheries assistance in the Caribbean at current values ('000 US\$)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
TECHNICAL ASSISTANCE	2,037	3,100	3,031	2,880
Multilateral	1,593	1,529	1,503	990
EEC	0	0	0	0
OPEC	0	0	0	0
Bilateral	444	1,571	1,528	1,890
CAPITAL AID	1,482	1,482	1,685	3,797
Multilateral	228	228	1,224	1,224
EEC	109	109	109	421
OPEC	645	645	0	0
Bilateral	500	500	352	2,152
Total :	3,519	4,582	4,716	6,677

Table CA.2

Fisheries assistance in the Caribbean at 1978 values ('000 US\$)
and annual variations (%)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Technical Assistance	2,037	2,793	2,484	2,165
Annual variation (%)		+37	-11	-13
Capital Aid	1,482	1,335	1,381	2,855
Annual variation (%)		-10	+3	+106
Total :	3,519	4,128	3,865	5,020
Annual variation (%)		+17	-6	+30

OCEANIA

This regional grouping includes 27 developing island or archipelagic states, scattered over a very vast water surface in the Pacific Ocean, ranging from Melanesia to Micronesia and Polynesia.

Table OC.1

Fisheries assistance in Oceania ('000 US\$), at current values

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
TECHNICAL ASSISTANCE	1,582	3,175	1,912	1,925
Multilateral	609	1,291	831	846
EEC	157	357	157	157
OPEC	0	0	0	0
Bilateral	816	1,527	924	922
CAPITAL AID	1,261	4,130	4,696	6,615
Multilateral	706	2,226	2,226	2,226
EEC	0	140	116	1,866
OPEC	0	0	0	0
Bilateral	555	1,764	2,354	2,523
Total :	2,843	7,305	6,608	8,540

Table OC.2

Fisheries assistance in Oceania at 1978 current values ('000 US\$) and annual variations (%)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Technical Assistance	1,582	2,860	1,567	1,447
Annual variation (%)		+80	-45	-8
Capital Aid	1,261	3,721	3,849	4,973
Annual variation (%)		+200	+3	+29
Total :	2,843	6,581	5,416	6,421
Annual variation (%)		+230	-18	+19

NEAR EAST

The Near East region has been divided into three subregions, where the "Northwest African countries" include Morocco, Algeria and Tunisia, while "Near East Africa" lists Egypt, Lybia, Sudan and Djibouti. The third category contains the Arabian Peninsula and Iran, Iraq and Syria.

Table NE.1

Fisheries assistance in the Near East, at current values ('000 US\$)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
TECHNICAL ASSISTANCE	2,849	5,515	2,693	6,445
Multilateral	837	3,228	1,511	910
EEC	0	0	0	0
OPEC	0	0	130	130
Bilateral	2,012	2,287	1,052	5,405
CAPITAL AID	8,198	10,562	16,567	34,170
Multilateral	3,375	5,426	9,551	16,351
EEC	0	0	0	600
OPEC	4,302	4,302	4,302	10,330
Bilateral	521	834	2,714	6,889
Total :	11,047	16,077	19,260	40,615

Table NE.2

Fisheries assistance in the Near East at 1978 values ('000 US\$)
and annual variations (%)

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
Technical Assistance	2,849	4,968	2,207	4,846
Annual variation (%)		+74	-55	+120
Capital Aid	8,198	9,515	13,580	25,692
Annual variation (%)		+16	+43	+89
Total :	11,047	14,483	15,787	30,538
Annual variation (%)		+31	+9	+94

Table NE.3

The subregional allocation of fisheries aid ('000 US\$)

Northwest African Countries

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
TECHNICAL ASSISTANCE	963	1,690	333	676
Multilateral	344	1,357	287	250
EEC	0	0	0	0
OPEC	0	0	0	0
Bilateral	619	333	46	426
CAPITAL AID	872	5,256	5,256	12,219
Multilateral	0	4,071	4,071	4,071
EEC	0	0	0	0
OPEC	552	552	552	3,340
Bilateral	320	633	633	4,808
Total :	1,835	6,946	5,589	12,895

Near East - Africa

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
TECHNICAL ASSISTANCE	534	1,996	904	5,331
Multilateral	245	1,242	450	352
EEC	0	0	0	0
OPEC	0	0	0	0
Bilateral	289	754	454	4,979
CAPITAL AID	201	681	1,406	4,206
Multilateral	0	480	1,205	4,005
EEC	0	0	0	0
OPEC	0	0	0	0
Bilateral	201	201	201	201
Total :	735	2,677	2,310	9,537

Near East - Asia

	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
TECHNICAL ASSISTANCE	1,352	1,829	1,456	438
Multilateral	248	629	774	308
EEC	0	0	0	0
OPEC	0	0	130	130
Bilateral	1,104	1,200	552	0
CAPITAL AID	7,125	4,625	9,905	17,745
Multilateral	3,375	875	4,275	8,275
EEC	0	0	0	600
OPEC	3,750	3,750	3,750	6,990
Bilateral	0	0	1,880	1,880
Total :	8,477	6,454	11,361	18,183

