

Fisheries policy content and direction in Asian APFIC member countries



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Asian APFIC member countries**

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FOREWORD

This review by the Asia-Pacific Fishery Commission (APFIC) examines the trends in fisheries and aquaculture policy in selected countries in Asia. The analysis is based on national policy documents and relevant literature as well as feedback from fisheries officials/experts in the region. The review assesses the policy status and trends relating to the use of development and/or management targets, natural resource management issues, financial, economic and marketing issues, and socio-economic and poverty issues. Some of the specific policy issues examined to see whether they are included in policy documents were: co-management; exploitation of offshore fisheries by local fleets; marine protected areas; subsidies; increases in value-added and exports; poverty reduction; and the use of alternative livelihoods. Individual country information was analysed to generate a regional synthesis of fisheries and aquaculture policy content and direction in the region, and the key drivers for change. The review highlights the differences in fisheries and aquaculture policy between countries, but also reveals a surprising degree of similarity between main policy directions, the issues included, and the strategies being used to manage the sector. Many countries' governments have initiated recent policy changes, often as a result of awareness about international views, policy changes/norms in other countries, and emerging ideas about what constitutes 'best practice'. In some cases donor projects and assistance have also been an important catalyst for policy change. The regional review suggests that much policy in the region is already well specified, and that while countries could certainly improve their policy content, greater challenges may lie in implementing policy than in improving policy itself.



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1. Introduction and some methodological comment

This paper has been prepared by Poseidon Aquatic Resource Management Ltd.¹, on behalf of FAO, as a background paper for the Asia-Pacific Fishery Commission (APFIC) forum held in Malaysia, 16 to 19 August 2006. Its main objective is to provide a *regional synthesis* of policy content and trends for fisheries and aquaculture in Asian APFIC countries. This synthesis is based on a review of fisheries policy in the following countries: Bangladesh; Cambodia; China PRC; India; Indonesia; Japan; Malaysia; Myanmar; Nepal²; Pakistan; Philippines; Republic of Korea; Sri Lanka; Thailand and Viet Nam.

As agreed with FAO at the beginning of the study, information on policy content and reasons for recent changes in these countries were collected through a desk study approach to complete a standard table template for each country. The table template (see Appendix B page 29) was structured into key sections focusing on a) the use of development and/or management targets, b) natural resource management issues, c) financial, economic and marketing issues, and d) socio-economic and poverty issues. In each section, questions were posed as to whether fisheries/aquaculture policy in a particular country included any reference to a range of different issues. The main purpose of the tables was not to summarize the complete contents of policy in each country, but rather to pick up on the extent to which countries may be adopting different issues that are topical at the present time, and which might be expected to be increasingly integrated into policy. The resulting detailed information on policy content and direction for all the individual countries reviewed is provided in tabular form in Appendix B.

In completing the individual country tables, the principal sources of information were national fisheries/aquaculture policy documents and legislation, and where possible the consultant has gone back to these core documents. However fisheries/aquaculture plans and policy statements have also been considered, other published literature has been reviewed, and experts in the region have also been consulted. References used by country are provided in Appendix A.

Individual country tables focus on fisheries/aquaculture policy, not other non-sectoral policies, although some comment is provided where possible on non-sectoral policy.

Given the necessary limitations of a desk-study of this nature on such a wide-ranging topic and including a large number of countries, the study nonetheless provides an interesting impression of key policy content and changes in the region, and provides some findings that may be both unexpected and of interest. The paper also provides some comment on the underlying ‘drivers’ resulting in recent changes in fisheries/aquaculture policies.

Finally, it should be noted that this paper focuses primarily on policy *content*, and not on its *implementation*. The distinction is important because while policy forms the basis on which the fisheries/aquaculture sector is managed, and specifying ‘good’ policy is therefore important and has its own challenges, the challenges of implementing policy once it has been defined remain a related, but separate, issue. This paper does not attempt to comment in any great detail on the extent to which stated policy is successfully being put into practice in the region. The distinction between policy content and its implementation is also important because it raises the possibility that while some

¹ Poseidon is a UK-registered company working globally to provide advice on fisheries and aquaculture issues (see www.consult-poseidon.com). Paper prepared by Graeme Macfadyen.

² There is currently no formal fisheries in Nepal. This paper therefore reports on policy in the other 14 countries for which policy documents and information have been reviewed.

issues may not be explicitly covered in documented fisheries policy, ongoing actions by governments may nevertheless be addressing such issues.

2. Regional synthesis

Information on policy content and direction in individual Asian countries has been analysed to generate a regional synthesis of the extent to which policy contains references to different issues (as explored in the table template on page 29) and the main factors driving policy content and changes. In the figures in the following text, the “spider-web” graphs are used to show the percentage of policies that include a particular issue. In interpreting the graphs, the following points should be noted:

1. Policy documents are not assumed to include an issue where its reference may only be implied, rather than being specific. For example, if policy refers to ‘credit’, but not specifically to ‘micro-finance’, then it is not referenced as including the issue;
2. It should be noted that because policy documents do not include an issue, this does not necessarily mean that a country is not involved in the concrete implementation activities related to the issue concerned³;
3. The percentage of policy documents containing reference to a particular issue is calculated by dividing the total number of policies including the issue, by the total number of policies for which the consultant is fairly certain whether the issue is included or not. Typically it has been possible to say with a high degree of certainty whether issues are included or not for more than 90 percent of individual countries’ policies; and
4. The graphs provide a clear indication of where there is most consistency within the region in terms of widespread/common references to specific issues i.e. those data points close to the outside of the “spider’s web”.

The following text provides comment and discussion on each of the four main subsections i.e. the use of targets, natural resource management issues, financial/economic and marketing issues, and socio-economic and poverty issues.

2.1 The use of policy targets

Policy documents in the region were reviewed to see whether they contain specific and quantifiable targets for a) development (i.e. production totals), and b) management, of both the aquaculture and fisheries sectors. They were also assessed for the inclusion of targets related to other issues.

Policy consistency between countries was found to be most apparent in the use of aquaculture production targets, with 85 percent of countries specifically stating planned or expected production totals in the coming years. In many cases planned increases are substantial. For example, compared to FAO data for 2004 as a base year, Malaysia plans to increase aquaculture production by 250 percent by 2010, Pakistan ~10 percent per annum, Thailand 5 percent per annum, and Viet Nam 25 percent by 2006 and 75 percent by 2010. While Indonesia is planning a 100 percent increase in aquaculture production over 2005 to 2009.

³ This relates to the slightly gray area as to whether government actions represent ‘policy’. For the sake of this paper, a fairly narrow definition of policy is assumed, and one which relates primarily to statements in formal policy and planning documents.

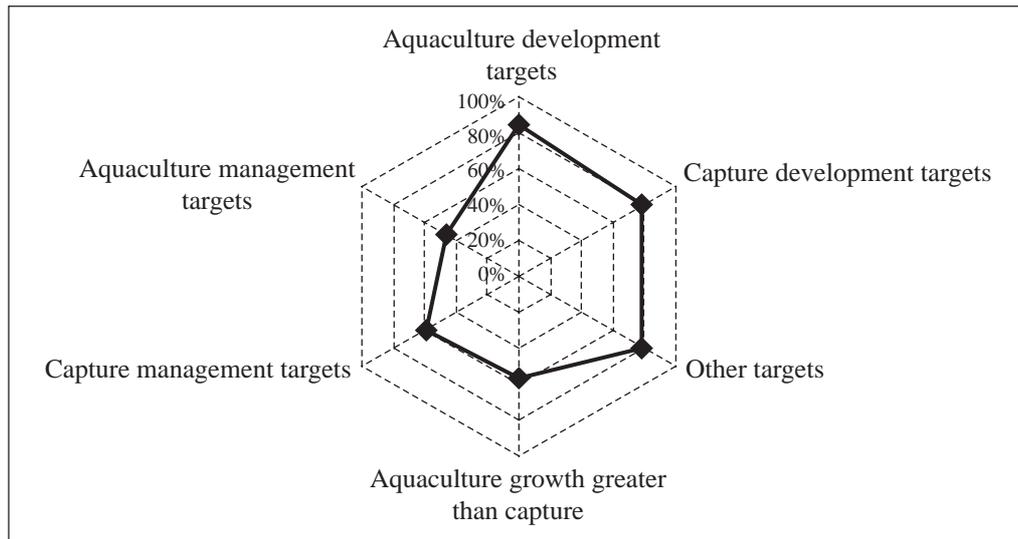


Figure 1: Use of policy targets

Seventy-nine percent (79 percent) of policies also include targets for capture fisheries production. Targeted increases in production are considerably more modest than for aquaculture, given recognition of existing levels of (over)exploitation. For example, China's and Pakistan's production targets for capture fisheries essentially aim at constant production, and Malaysia and Viet Nam have targets which imply constant or declining coastal production but increasing offshore fisheries catches. Thailand has a target of 1.7 million tonnes from Thai waters and 1.8 million tonnes from foreign waters, representing a 23 percent increase on 2004 production totals, and Indonesia plans for a 9 percent increase in capture fisheries production between 2005 and 2009.

The inclusion and relative levels of development/production targets for aquaculture and capture fisheries are thought to be driven strongly by national economic planning, which tends to focus on production and GDP increases. Overall national economic growth targets influence sector policies, as evidenced in those countries with targeted capture fisheries production increases that may be unrealistic given current stock status. FAO estimate (FAO, 2005) that three percent of marine stocks are under-exploited, 21 percent are moderately exploited and could support modest increases in fishing and in harvests, 52 percent are fully exploited. The remaining 24 percent are overexploited (16 percent), depleted (7 percent), or recovering from depletion (one percent).

Management targets for capture fisheries and aquaculture are less common than development targets and are included in only 58 percent and 46 percent of policies respectively. Cambodia's use of targets for management of capture fisheries is shown in Box 1. Some other interesting management targets include the area under organic farming in Viet Nam, Republic of Korea's intention to reduce the number of aquaculture facilities by 10 percent over the next years with new licences being issued for technologies offering the potential for high value-addition rather than production of species already 'overproduced', Japan and Republic of Korea's use of number of species under Total Allowable Catch (TAC) management, and Japan's targets of 51 Resource Recovery Plans (RRP) and area of seagrass beds and tidelands to be created (5000 ha between 2002 and 2007). Pakistan's new policy document also has specific targets for a) area of degraded mangrove to be rehabilitated, b) number of illegal, unreported and unregulated (IUU) offences, c) size of shrimp fleet, d) numbers of artificial reefs, e) rates of by-catch and discards, and f) number of protected areas and fish sanctuaries.

Box 1: Capture fisheries management targets in Cambodia

Targets for 2005-2008 include:

- At least 50 maps of fishing lots, public fisheries domain and areas for community fisheries will be prepared and printed.
- Establishing a conservation site in each community fisheries and limit fishing violations within the community fisheries.
- More than 30 ha of lake and canal will be renovated.
- 20 new conservation sites will be defined.

Indicators/targets for 2006 include

- Development of existing fish sanctuaries and assessment of 36 deep pools in Kratie and Stung Treng to determine suitable conservation areas.
- 20 maps indicating clear boundaries of flooded forest produced
- Existing community fisheries strengthened and 75 new community fisheries established.

Source: Fisheries Development Action Plan (FDAP) 2005-2008 and www.twgf.org

Seventy-nine percent (79 percent) of policies also have targets relating to ‘other’ factors. Most typically these ‘other’ targets relate to increases in:

- Exports (e.g. Indonesia has a target of US\$5 million by 2009);
- Per capita fish availability (e.g. India has a target of increasing current per capita availability of fish from 5 kg/year to 11 kg/yr);
- Self-sufficiency (e.g. Japan has a target of 65 percent self-sufficiency in fish and shellfish products for food by 2012); and/or
- Increasing contributions to GDP (e.g. Sri Lanka has a target to increase the contribution of the fisheries sector to GDP from the present level of 2.7 percent to 4 percent by 2012).

Key finding(s)/discussion point(s): The inclusion and relative use of targets in policy documents indicates that:

- a) Targeted production increases must be viewed against a background of existing production totals (2004) for the Asian and Pacific countries of 46.7 million tonnes of capture fisheries production, and 40.4 million tonnes of aquaculture production⁴. These figures compare with global capture fisheries production of 95.0 million tonnes, and global aquaculture production of 45.5⁵ million tonnes (FAO, 2004), demonstrating the quite staggering contribution of Asian and Pacific countries to global totals (49 percent of capture production and 89 percent of aquaculture production);
- b) Targets for increasing production and exports are afforded higher priority than management targets;
- c) Aquaculture is viewed in the region as offering more potential for relative growth than capture fisheries; and

⁴ Excluding aquatic plants.

⁵ Excluding aquatic plants.

- d) Capture fisheries and aquaculture production increases may both be unrealistically driven by national economic goals. For aquaculture, disease risks and issues related to land availability and feed supply may present unforeseen challenges in the future, while for capture fisheries production resource potential may prohibit any increases at all.

2.2 Natural resource management issues

The second main subgroup of issues considered in policy documents are those related to resource management issues. In this section, discussion is provided in turn on issues which are included in all policy documents (Section 2.2.1), those included in more than 70 percent but not all policy documents (Section 2.2.2), and those in less than 70 percent of policy documents (Section 2.2.3).

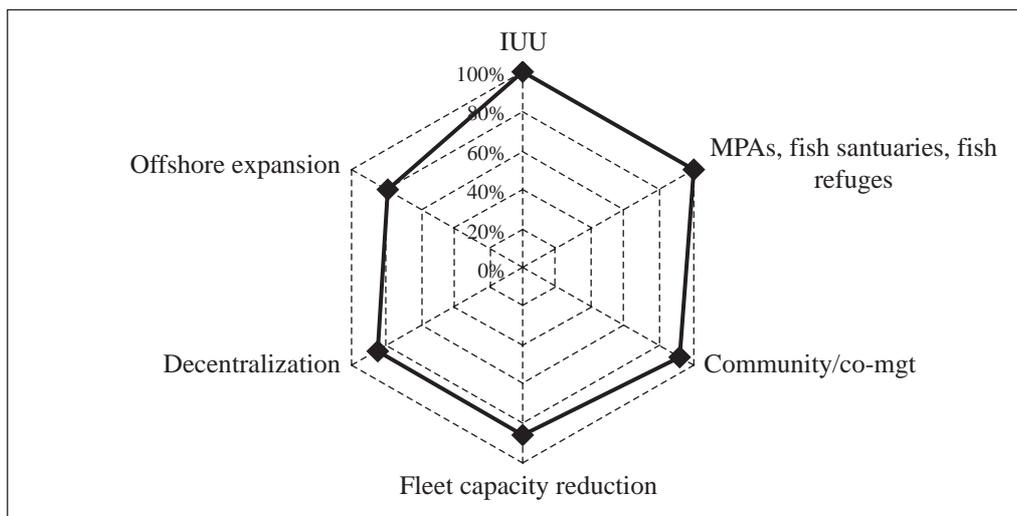


Figure 2: Natural Resource Management issues (1)

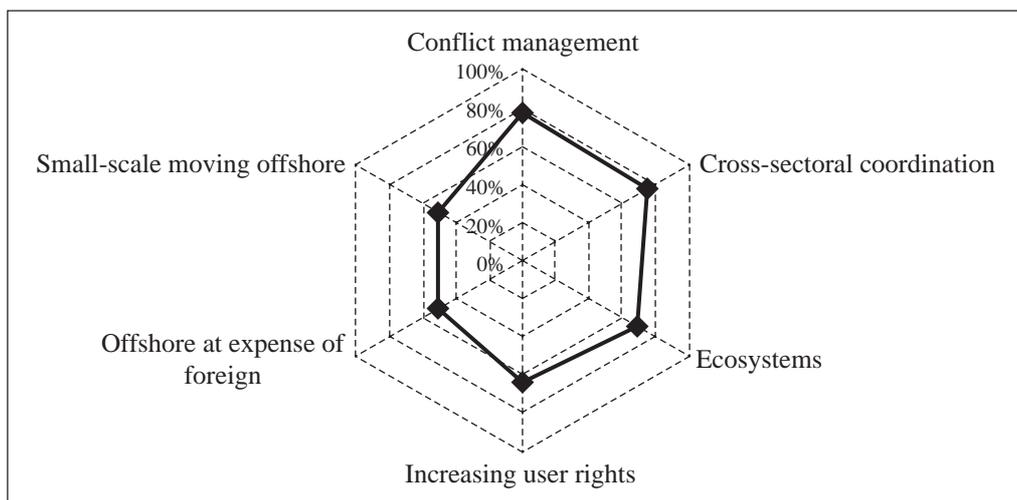


Figure 3: Natural Resource Management issues (2)

2.2.1 *Illegal, Unregulated and Unreported (IUU) fishing and Marine Protected Areas (MPAs)*

The greatest level of consistency between policy documents in different countries in Asia is found for issues relating to Illegal, Unregulated and Unreported (IUU) fishing, and the use of MPAs (or related area restrictions on fishing such as fish sanctuaries and fish refuges). All policies are found to contain references to both of these issues.

The high degree of references in policy to illegal fishing, and the need to combat it, is not surprising – the International Plan of Action (IPOA) on IUU observes that “IUU fishing occurs in virtually all fisheries, causing problems for people who are trying to manage fisheries properly”. The IPOA-IUU offers a wide variety of tools (e.g. VMS, observers, catch documentation schemes, vessel registration, etc.) for countries to use to combat IUU fishing, individually and in collaboration with other countries. Many of these tools are incorporated into national policy documents, as in the case of Japan as described in Box 2 below, where private sector initiatives are providing additional support to government sector policy on the issue.

Box 2: Some aspects of Japan’s policy on tuna IUU

To prevent, deter and eliminate IUU fishing and uncontrolled importation of catches, the “Law of Special Measures for Strengthening Conservation and Management of Tuna Resources” was established in 1996 and has been controlling trade of tunas caught by IUU and reflagged fishing vessels. Policy includes:

- Only Japanese vessels may fly the flag of Japan;
- Trade measures to help with IUU e.g. any person who intends to import bluefin tuna, southern bluefin tuna, big-eye tuna, sword fish, patagonian-toothfish or Antarctic toothfish, must submit required statistical documents or catch documents in accordance with the rules set by the relevant international fisheries organizations; and
- Transshipment regulations require permits and notification.

As a private sector initiative, the OPRT (Organization for Promotion of Responsible Tuna Fisheries) has been established in Japan with a view to promote a responsible tuna fishery. The members of the OPRT includes large-scale tuna long-line fishery organizations from China (Taiwan Province of China), Indonesia, Japan, Republic of Korea, and Philippines, as well as Japanese importers, distributors, and consumer organizations. Activities of the OPRT include (i) dissemination of information related to the IUU problems in tuna fishery, (ii) calculation of tuna landing statistics by vessel using the data obtained from Japanese import documentation materials and to report back such figures to the vessels’ flag states for their cross-checking of reported catch data, and (iii) implementation of scrapping of IUU vessels.

Source: FAO Summary Brief, 2006, OECD, 2003.

In addition to national policy documents, it should also be noted that many regional fisheries management organizations have measures in place to deal with IUU fishing. Also of significance to fisheries policy in individual countries therefore are their obligations as Contracting Parties to such organizations. The Indian Ocean Tuna Commission (IOTC) for example has a wide variety of resolutions and recommendations relating to IUU. These relate to issues such as vessel registers (e.g. Resolution 05/02 Concerning the establishment of an IOTC record for vessels authorized to operate in the IOTC area), an IUU list (Resolution 02/04 on establishing a list of vessels presumed to have carried out illegal, unregulated and unreported fishing in the IOTC area), and inspections (e.g. Resolution 05/03 relating to the establishment of an IOTC programme for inspection in port).

Marine Protected Areas (MPAs) are established for a wide range of purposes, including protecting marine species and habitats, conserving marine biodiversity, restoring fish stocks, managing tourism activities, and minimising conflicts (Pomeroy, et al., 2004). Given their multiple functions and objectives, it is also perhaps not surprising that all policy documents contain some reference to them or area closures of some kind. In reviewing policy documents, an impression is gained that area prohibitions are most widely used to protect marine species and habitats, than for the other possible reasons mentioned above:

- In China marine nature reserves are composed of core, buffer and experimental zones, in order to facilitate multiple uses and protect sensitive resources. In 2003 there were over 69 marine protected areas in China (including bays, islands, estuaries, coasts, coral reefs, mangrove swamps, coastal lagoons, marine natural history sites, seaweed beds and wetlands), covering an area of 12674 km² (PEMSEA, 2003);
- Republic of Korea has been operating Fishery Resources Protected Areas (FRPA) to protect fish habitats and spawning grounds (OECD, 2002);
- Sri Lanka's policy states that "The State shall take steps to identify environmentally sensitive areas, which have been heavily exploited and need to be protected from such exploitation and, declare them as Marine Protected Areas (MPA) when and where necessary" (Fisheries and Ocean Resources Policy document, 2002); and
- In Indonesia there are already over 5 million ha of MPAs.

2.2.2 *Community/co-management, decentralization, fleet capacity reduction, expansion of offshore fisheries, cross-sectoral coordination, and conflict management*

Schmidt (2003) notes that "while Japan is not the only country that uses co-management approaches, it is the country that has developed this approach most, reflecting the particular importance that is associated with fish and fishing as an activity and the fact that this approach has been applied through centuries." In fact many countries utilized community management systems over decades/centuries, before control and authority came to be more centralized in the second half of the 20th century. But both community management and co-management, are now gaining increasing recognition. References to community co-management in policy in the region are now surprisingly common (and are contained in 92 percent of countries' fisheries/aquaculture policy). This trend is driven by, amongst other things, an awareness of resource depletion, conflicts both within the sector and between fisheries and other sectors, and the perceived benefits of community co-management as an approach to address these issues and the relative failure of more traditional centralized management regimes.

Community co-management and improved sector governance is now being encouraged, or at least enabled, by common references in policy documents to decentralization and/or local administrations or management units being involved in fisheries management. But while community co-management is provided for in most policy documents, current community co-management initiatives on the ground remain as pilot activities only in many countries, and in some cases support is more rhetoric than reality with insufficient real transfer of powers and financial resources to local levels (Macfadyen, Cacaud and Kuemlangan, 2005). However, the rise in practical implementation of community co-management appears to be gathering pace, and is increasingly supported by policy references on the issue. While strongly driven and supported by donor projects in recent years, many governments now appear to be realizing the potential benefits of such management techniques.

References to fleet capacity reduction in policy are also very common (in 86 percent of policies), perhaps due both to obvious impacts on resources and the IPOA on the issue. Some countries such as China, Japan, Malaysia and the Republic of Korea already have vessel buyback policies and programmes in place – such decommissioning policies are widely used outside of Asia, for example in Europe. In China there are fishing vessel and power control quota for marine capture fisheries, and in 2002, China started a 5-year buy back programme to carry out policy of "minus growth" for catch of marine and inland capture fisheries. According to the programme, China will reduce 30000 fishing vessels (FAO, 2003). In other countries reference is made to capacity and measures to reduce it, but implementation is more at a planning stage. The marine action plan in Bangladesh for example

Box 3: Cambodia's policy on community management

In October 2000, Prime Minister Hun Sen initiated a reform of the fisheries sector and announced the release of 56 percent of the fishing lots from private control to be used by community fisheries. The Sub-Decree on Community Fisheries Management provides the rules and procedures for establishing and managing community fisheries throughout Cambodia.

Policy includes the statement that “Encouraging the effective establishment of community fisheries in inland and coastal areas in order to enhance the management of sustainable fisheries resources by empowering local communities;”, and one of 6 priority actions in the Fisheries Development and Action Plan 2005-2008 is “Community based fisheries management to promote local participation in fisheries management linked to livelihood diversification.”

Source: RCG Statement on policy, FDAP 2005-2008, Macfadyen et al., 2005, Sub-Decree on Community Fisheries Management.

states that “Based on the assessment of the resource prepare national allocation for the total number of mechanized commercial boats permitted”, and “Distribute allocated numbers across the districts where boats are traditionally harboured”. And India’s policy provides for “An assessment of existing fishing capacity and plans for regulating or developing one or the other sectors of EEZ would be taken up” (Comprehensive Marine Fisheries Policy, 2004). Likewise, Indonesia now has a National Plan of Action to measure capacity and address capacity reduction programmes (FAO Country Review, 2003). But in these countries, as in others such as Philippines where policy requires capacity control, active implementation of policy appears to be progressing more slowly, perhaps in part due to the more ‘open access’ nature of fisheries in these countries making capacity reduction more problematic.

As with the comments made above about obligations relating to IUU resulting from signatory to international fisheries organizations, national policy on capacity must also be viewed in the context of relevant resolutions of international organizations. Again taking the IOTC as an example, relevant resolutions include Resolution 03/01 on the limitation of fishing capacity on Contracting Parties and Cooperating non-Contracting Parties. It is worth noting here that the IOTC is unlikely to sanction increases in fishing capacity in the future due to the current stock situation, removing policy options for individual countries that are Commission Members⁶. IOTC has however granted special status to coastal countries of the Indian Ocean, which allows for some possible expansion of fleets along with a requirement to submit a fleet development plan (Resolution 03/01).

Section 2.1 on policy targets highlighted that many countries have targets for production increases from capture fisheries, even though coastal fisheries are acknowledged in almost all cases as being fully- or overexploited. Seventy nine percent of policies in the countries under review specifically refer to expansion of offshore fisheries. Many policy documents provide the impression that offshore fisheries are a panacea for inshore problems. Article 14 of China’s 1986 Fisheries Law for example specifies that “The state shall encourage and support the development of offshore and deep sea fisheries and make rational arrangement of fishing capacity for inland and inshore fisheries”. In Myanmar policy is based on the estimation that about one million tonnes of fish can be additionally exploited annually from offshore fisheries. Sri Lanka’s policy raises a note of caution however by stating that “Although a proper assessment of resources has not been done, it is assumed that these resources still remain under-utilized” (Fisheries and Ocean Resources Policy document, 2002), and

⁶ Resolutions are binding on the Commission Members, unless there is specific objection on the part of the Members. Recommendations are slightly different in that they are not binding the Members, but rely on volunteering.

the Marine Action Plan for Bangladesh provides for a “plan to collect information on deepwater fishes”. These statements indicate that in many countries, reliance on offshore fisheries may be based more on expectation than on hard science, potentially impacting on the ability of countries to realize their stated policy targets for increased fisheries production. In addition, and as noted in Section 2.2.3 below, there may be difficulties for local interests to move offshore (e.g. capital/credit, skills, etc.) or an unwillingness to do so for cultural and/or social reasons (e.g. not wanting to be away from home for long periods).⁷

Turning to references in policy to cross-sectoral coordination, fishers and fish farmers in both coastal and inland areas often compete for the water (or access to it) from which the resource is extracted (e.g. with irrigation schemes and hydro-power dams in the case of inland fisheries, and marine parks, tourism activities and general coastal development in the case of inshore fisheries). This multi-use, multi-user characteristic is a factor greatly affecting the livelihoods of fishing communities and the ability of policy makers and managers to define and implement effective policy. Taking an even wider perspective, integrated rural development initiatives aimed at creating or strengthening cross-linkages between literacy, housing, social security, health, infrastructure, etc., can also have a significant positive impact on the livelihoods of fishers, without necessarily addressing directly resource management issues. A good example of this type of approach is an FAO-funded project in Cox’s Bazaar, Bangladesh where the villages along the coast have been empowered to improve their well-being by first dealing with sanitation and health problems, then improving educational facilities, developing saving schemes and, as a last step, addressing fishery resource management and safety-at-sea issues. This type of holistic rural development approach helps to overcome the dilemma on how to conserve resources (in the longer-term) when the obvious immediate imperative is to alleviate poverty and reduce vulnerability of fishworkers and their families (Staples, D., Pers. Comm.).

Such factors highlight the need for fisheries/aquaculture sector policies to consider the impact of policies in other sectors, and where possible to promote cross-sectoral collaboration. The review of national fisheries/aquaculture policies suggests that there is wide appreciation from policy makers of the need for such cross-sectoral collaboration. Seventy five percent of policies refer in some way or another to cross-sectoral coordination. In the new Pakistan policy for example there are seven strategic axes (each with multiple activities). The first axis is specifically focused on strengthening cross-sectoral collaboration and contains more than 30 specific activities aimed at achieving this.

Finally for this group of issues, conflict management is referred to specifically in 77 percent of fisheries/aquaculture policies in the region. And even where not specifically referred to, reference is often implied by solutions related to zoning of fishing activities, and a focus on inshore/small-scale vs offshore/industrial conflicts. In Cambodia policy mentions “conflicts between private fishing lot owners and rural people regarding access to fishing areas” as a key motivation for the Prime Ministerial decree on fishing lot reforms, and one expected result of policy implementation is “conflicts over resource access will be reduced and livelihoods of fish folk are improved”. In Pakistan’s policy, under a cross-cutting strategy axis there are five specific activities on integrated coastal management aimed at reducing conflicts. In some countries policy specifically includes conflict resolution mechanisms, such as in India, Indonesia and Sri Lanka – information on the latter is provided in the Box below.

⁷ Moving fleets offshore or rebuilding fleets can benefit from an example outside the region. In Namibia, foreign capital assets were permitted, but Terms and Conditions of Licences included a ‘national content’ clause with a higher percentage of national crew content resulting in lower license fees, and a commitment to increase national content over time. Such initiatives can help to foster a gradual move offshore and nationalization of the fleet, or at least increased offshore employment, and provides additional benefits without large local capital inputs.

Box 4: Conflict resolution in Sri Lankan policy

The Special Area Management (SAM) process deals with conflict both within the fisheries sector, and between fisheries and other sectors. When conflicts among stakeholders are likely to lead to resource depletion/degradation in environmentally sensitive areas, these areas are identified first as areas needing Special Management Measures in the legislation. Management of such resources is then carried out by a SAM Committee consisting of representatives of all stakeholders. This has worked quite well in Sri Lanka. Two such management sites are the Hikkaduwa and the Rekawa coastal areas.

Disputes between user groups have been settled by government over a number of decades using a dispute resolution mechanism that has resulted in specific local regulations being made, and which can be thought of as a form of co-management. Fisheries Ordinance 1940 contains detailed provisions to deal with disputes. Sections 20 and 20A, provide regulations to appoint a Committee of Inquiry or a Commissioner to deal with fishing disputes. Many area-specific regulations have resulted from this process.

The 2002 policy document also has a section on access, which includes issues which will reduce conflict e.g. zoning, access to beaches and landing sites, etc. It states that “The State shall provide all facilitative functions to ensure that conflicts among resources users, especially between those using inland water bodies for agricultural and fisheries purposes are resolved through proper coordination of the activities of multiple stakeholders, with the support of the relevant authorities”.

Source: Macfadyen et al., 2005, Fisheries and Ocean Resources Sector Policy 2002.

2.2.3 Ecosystems management, increasing use of ‘use rights’, offshore expansion at the expense of foreign vessels, small-scale vessels moving offshore

This last group of issues relating to natural resource management was less well represented in policy in the region. This was especially the case for specific references to a) expansion of offshore fisheries at the expense of foreign vessels (in 50 percent of policies), and b) small-scale fishers moving offshore (also in 50 percent of policies). With respect to the former point, it may be because countries feel that excluding foreign vessels does not necessarily mean that local vessels will be able to exploit offshore resources, thereby just resulting in lost licence revenue for governments. This appears to be the case in Pakistan where the Deep-Sea Fishing Policy specifically refers to the failure of local vessels to move offshore for a variety of reasons including access to credit, and hence sanctions the use of offshore zones by foreign vessels. But some countries are specific in their policy about excluding foreign fishing interests. India has never signed a fisheries access agreement with a distant water fishing nation and has persisted for decades in its attempts (e.g. 1981 Charter Policy, and use of joint ventures) to develop its own offshore industrial fisheries by nationally-owned interests. And Malaysia is currently in the process of training locals to be *tekongs* (skippers) of deep-sea boats so that they can replace foreign *tekongs*.

With respect to local small-scale vessels moving offshore, some countries specifically refer to this as a policy objective e.g. India (“the small-mechanized sector would be encouraged by providing incentives for acquisition of multi-day fishing units), Malaysia, Viet Nam and Sri Lanka (“subsidies and subsidized credit granted to facilitate movement of coastal fishermen into less-exploited offshore and deep-sea resources could facilitate this transfer”). But many do not. Again this may be because of a realization of the practical and financial difficulties of small-scale fishers moving too far offshore, even though greater motorization and inshore pressure has forced many to do so. Or it may be because policy is to reduce inshore fishing pressure by other means e.g. through support for alternative livelihoods.

Only slightly better represented in policy (in 64 percent of policies) is the use of use/property rights. From an economic point of view, use rights have a special emphasis on certain characteristics, especially duration, exclusivity, and transferability. Permits and licences are therefore a weak form of right and not widely included within an interpretation of use rights (Shotton, 2000). A management system that allocates rights to a share in the fishery can take many forms. In developed countries, there have been several attempts to grant rights of access and harvest to individuals or firms e.g. in the form of individual transferable quotas (Shotton, 2000), while in the small-scale fisheries of developing countries, access and harvest rates are typically devolved to communities (Willmann, 2000; Kurien, 2000). Territorial use rights in fisheries (TURFs) are an example of allocation of property rights to a geographically-defined group (Christy, 1982).

There is of course considerable literature on the issue of rights-based fisheries management. While there is a general agreement that ‘open access’ to ocean and lakes induced by the lack of enforceable use rights have generally led to overfishing (through increases in capital inputs as well as increased numbers of fishers), restricting access to the resource means that some people will be excluded from fishing. Many countries, particularly developing countries – but not exclusively (for instance the EU in the 1990s) – have therefore been relatively reticent to limit access because of the anticipated social and political costs that would have to be borne in the transition to better fisheries management. This pattern is prevalent in Asian countries as it is elsewhere in the world, but that makes the concern no less worrying that not more policy documents in the region make specific reference to the need for use rights. Some information on policy on use rights in China and Japan is provided in Box 5.

Finally in relation to natural resource management issues, ‘ecosystems management’ is featured in ‘only’ 69 percent policies. However, given the relatively recent advent of this issue as a topical fisheries management subject, the extent of its inclusion can be considered impressive, and to have resulted from considerable focus and attention on the issue within fisheries circles in recent years, and the publication of the recent FAO Technical Guidelines to the Code of Conduct on Responsible Fisheries (CCRF) on the ecosystems approach to fisheries (FAO,2003). The lack of even wider reference in policy may be because of limitations in understanding about ecosystems, and challenges in making ecosystems approaches to fisheries management operational. But as Sri Lankan policy nicely puts it “Ecosystem considerations in fisheries management do not require that we understand all things about all components of the ecosystem. It is understood that a traditional single-species approach of fisheries management is traceable, but it is also known that it may not be sufficient. It is also understood that an ecosystem perspective is desirable, but it is complex and unpredictable. However, an Ecosystem Based Management (EBM) need not be endlessly complicated. An initial step may require only that, those who are concerned with management, consider how the harvesting of one species might impact other species in the ecosystem” (Fisheries and Ocean Resources Sector Policy, 2002). Indeed the abstract to the FAO Guidelines specifically state that “Although there are many gaps in our current knowledge of ecosystems and how they function, these guidelines stress that uncertainty should not prevent the development of operational objectives aimed at improving human well-being as well as protecting and improving the status of marine coastal ecosystems” (FAO, 2003).

Key finding(s)/discussion point(s): Some questions and issues raised by the text in Section 2.2 on natural resource management issues include:

- a) Given the prevalence of IUU fishing and the importance for stock preservation of reducing IUU fishing activity, are countries utilizing the full range of measures available, as outlined in the IPOA-IUU?
- b) Given the wide use of MPAs and area restrictions in the region, countries must evaluate the natural and socio-economic impacts of such policy measures. Are such evaluations being conducted?

Box 5: Use rights in Japan and China

China

Law seeks to use a property rights and quasi-exclusive ownership approach to manage principal ocean resources in China's territorial sea. The Law sets out a framework for classifying uses of ocean space and granting licences according to the functions classified. Article 10 of the 1986 law states that "In conformity with the overall arrangement made by the state for utilization of water areas, people's governments at and above the county level may assign state-owned water surfaces and tidal flats that have been designated for aquaculture to units under ownership by the whole people and units under collective ownership to develop aquaculture, and after examining their qualifications grant those units aquaculture licenses to confirm their rights to the use of such water surfaces and tidal flats. Ownership and rights to the use of water surfaces and tidal flats shall be protected by law and shall not be subject to encroachment by any units or individuals." The 2001 Law reinforces this by stating in that Article 6 "The State establishes a registration system for the right to the use of sea areas. Such rights shall, once registered in accordance with law, be protected by law." Numerous other articles then provide detail on the mechanisms for this.

Source: Chinese Laws of 1986, 2001 and 2002.

Japan

Sea tenure in Japanese coastal waters operates at various levels, ranging from the national government, through the prefecture and the local FCA, to the fishing squad and finally to the individual fisherman. There are essentially three main types of rights. The first is the Joint Fisheries Right (*Kyodo-Gyogyoken*). This fishery right is originally based on common ownership systems of local fishing grounds. The licence is issued only to fishery cooperatives, in which at least two-thirds of members are engaged in coastal fisheries for at least 90 days in the areas. Members of the cooperative use the licence on an individual basis. This type of fishery occurs in almost all areas throughout the Japanese coast. According to the Fisheries Law (1949) fisheries rights in the sea area under the jurisdiction of a Fishery Cooperative Association (FCA) are the bona fide personal property of the individual members of that association, to whom they are distributed by the association. Each FCA establishes regulations for the control and operation of various types of fishery in an equitable, efficient and sustained manner, as local conditions dictate. The second type of fishery rights is the Demarcated Fishery Right (*Kukaku-Gyogyoken*). This is the right to engage in aquaculture. The main types of these fisheries are hanging culture, cage culture, seabed sowing cultivation in semi-inland sea areas. The last of the three fishery rights is the Set-Net Fishery Right (*Teichi-Gyogyoken*).

Source: Fisheries Law of 1949, OECD, 2004.

- c) Effective community/co-management requires decentralization of budgets, the ability to raise and retain revenue at the local level, and coherence between community/co-management policy and legislation. Are such factors in place? (see also key conclusions about supportive policy and legislative frameworks for community/co-management in Macfadyen, Cacaud and Kuemlangan, 2005).
- d) Capacity reduction is provided for in policy in many countries. What are the relative costs and benefits (economic, social, natural and political) of different measures e.g. buy-back schemes, use/withholding of licenses, input versus output restrictions, etc., and do countries have national plans of action in place? Has progress towards implementing policy been hampered by technical issues related to measuring and assessing appropriate levels of capacity?
- e) Increased production from offshore fisheries is a stated policy objective in many countries, but the extent to which such resources actually offer potential for sustainable and meaningful increases remains unclear in many cases.

- f) What practical difficulties are small-scale fishers likely to face in moving offshore (e.g. access to credit, skills, etc.), and how can these difficulties be minimized?

2.3 Financial/economic and marketing issues

The third main group of sub-issues assessed for their inclusion in policy documents related to financial, economic, marketing and trade issues.

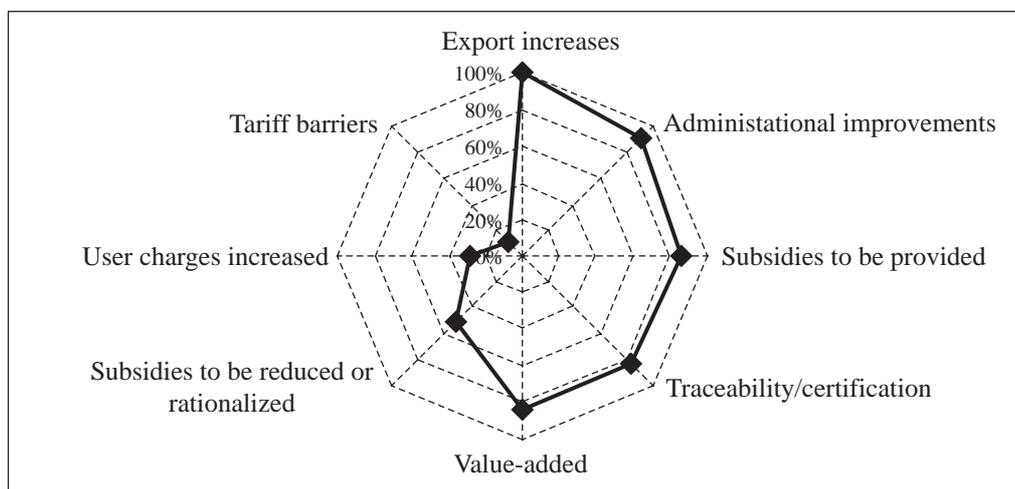


Figure 4: Financial/economic and marketing issues

2.3.1 Trade/marketing issues

An objective of ‘increasing exports’ or references to export increases are included in all fisheries/aquaculture sector policies in the region, often as a high-level policy goal. In India the first of three key policy goals is “to augment marine fish production of the country up to the sustainable level in a responsible manner so as to boost export of seafood from the country and also to increase per capita fish protein intake of the masses”. This policy goal is being supported by the Marine Products Export Development Authority, a nodal agency was set up by the Government of India in 1972 for the promotion of seafood exports from India. And in Malaysia the overriding objective of the 3rd National Agricultural Policy is “the maximization of income through the optimal utilization of resources in the sector. This includes maximizing agriculture’s contribution to national income and *export earnings* as well as maximizing income of producers.” (author’s emphasis). In Pakistan’s policy there are nine specific activities aimed at increasing access to international markets.

The wide inclusion of references to exports is not surprising given that, while trade has become an extremely contentious issue in recent years, there is little doubt that both domestic and international trade has the potential to generate enormous direct and indirect benefits, and offers huge potential for the fisheries sector to contribute to foreign exchange, economic growth, and poverty alleviation. Bangladesh for example has a stated policy objective to “achieve economic growth and earn foreign currency by exporting fish”. And in Thailand overall fisheries management objectives, as presented by the Minister when detailing the restructuring of the Department in late 2002, included “earning of foreign exchange through the use of responsible fisheries practices”.

This focus on exports must be seen in the context of some important trends in fisheries trade in recent years, which include:

- Developing countries as a group are gaining an increasingly large share of total world trade, both in terms of exports and imports (Kurien, 2004);
- An increasing share of trade is being made up of aquaculture products;
- More fish and fish products are being sold in fresh chilled or frozen form, as opposed to traditional forms of preservation in developing countries of salting or drying; and
- There is increasing consumer concern about social, environmental and health issues. These concerns are being reflected by businesses in the development of what is known as Corporate Social Responsibility (CSR), and by the increasing use of certification schemes and codes of practice. There are now a wide range of audit, traceability and certification schemes and initiatives related to standards, which are in various states of readiness – some dealing with social issues, some focusing on health/hygiene, some on technical standards (e.g. labeling), and others concentrating more on sustainability and the environment (e.g. the Marine Stewardship Council).

These trends have a number of implications and impacts, which are important to consider given that poverty and food security are also high-level policy goals in many countries.

- There have been locational shifts in post-harvest activities where aquaculture activities are located in different areas to traditional capture fisheries activities (Béné et al., in press);
- Some countries, e.g. India, are experiencing changing fishing practices, with greater levels of investment and technology in the catching sector resulting in concentration of ownership in fewer hands, landings in fewer landing centres, and locational and distributional impacts on the availability of fish to the post-harvest sector and to consumers (IMM, 2003). Hapke (1996), in her study of women fish vendors and traders in Kerala, India also notes that motorization and mechanization has changed the geography of fish production towards greater centralization of landings in particular places, from a situation where landings used to be decentralized and beach-based. This may be true of several other parts of the Asian region;
- The conclusion from eleven case studies recently completed as part of a study on food security (Kurien, 2004) was that significant employment has been created in modern fish processing activity, mainly for women, as a result of international trade, generally with good physical working conditions due to the harmonized standards of Hazard Analysis and Critical Control Point (HACCP) processing plants. But this employment generation has been at a cost – the vast majority of workers in the traditional processing sector are also women – generally middle-aged and with little education. While large numbers of them have been, and continue to be, associated with different forms of regional trade in traditionally processed products, and the remainder are employed in fish processing for domestic markets, the case studies showed that increases in the export of fishery products has resulted in a significant decline in the quantity, and also an increase in the price, of fish available to these women for processing;
- Increasing exports may have implications for domestic fish/food supply? Korea for example recognizes in its policy that strong domestic demand must also be satisfied (OECD, 2002);

- While certification, traceability and standards initiatives may offer the opportunity in some cases of higher prices and access to niche markets, there are some concerns over the possible negative impacts on developing country producers (Gardiner and Viswanathan, 2004).

The regional policy review reveals that many countries are concerned to address this latter issue, and traceability/certification is included in 83 percent of policies in the region. Some countries such as Viet Nam are focusing attention on organic aquaculture production. In many countries, including but not limited to Thailand, Viet Nam, Indonesia, India, Bangladesh, there is a strong focus on traceability, HACCP and quality improvements, especially in relation to certification/codes for aquaculture production, and especially for shrimp exports. However, while other issues with potential distributional/location impacts were not specifically examined for their inclusion in policy documents, an impression is gained that policies are generally rather silent on such issues.

References to increasing value-added are found in more than 83 percent of policy documents, and in many, but not all cases, are related to comments/objectives about increasing exports. For example Philippines' policy in the 1998 Code states a requirement for BFAR to develop value-added fishery products for domestic consumption and export. The high inclusion of this issue in policy is a recognition that limitations to increasing capture fisheries production and a strong emphasis in national planning on growth in GDP (itself a measure of value-added), require specific focus on maximizing the potential economic and financial benefits from a limited resource/output. Comments on value-added are most often tied to sections of policy related to trade and post-harvest activities. While this is in some way understandable given the obvious potential to add value through processing, it should be remembered that value-added (i.e. profit plus wages) is also generated in the catching/farming sectors. A lack of concentration on value-added *throughout the supply chain* is therefore perhaps a little surprising.

Finally in relation to trade/export issues, a very low proportion of policies in the region specifically refer to issues of tariff/trade barriers. This is also a little surprising given the often-stated impacts of tariff schedules, technical barriers to trade (TBT), Sanitary and Phytosanitary Measures (SPS), and the Generalized System of Preference (GSP), but is perhaps explained by national and regional (e.g. ASEAN) policy on tariffs being considered outside of sectoral fisheries policy. Nevertheless, such issues might be properly included in fisheries policy, at least in terms of actions to mitigate against negative impacts of international trade regimes and actions. For example, does Indonesia have sufficient fisheries/aquaculture policy on ways of dealing with potential threats to its shrimp exports i.e. anti-dumping legislation in the USA? Does Thailand have appropriate policy to ensure that that it makes the most of tuna trade opportunities with the phasing out of EU preferential tariffs to ACP producers in the coming years?

2.3.2 *Financial/economic issues*

Financial aspects of fisheries are gaining increasing recognition, and there are moves internationally towards greater 'market discipline' in the sector. Policies in the region were thus reviewed to see if they contained references to subsidies, improvements in administrative efficiency, and/or the use of user charges.

While subsidies and wider incentives leading to overexploitation should of course be guarded against, subsidies may be appropriate if they enhance or diversify livelihoods without leading to increased fishing capacity or trade distortions, and/or are used to facilitate a structural change, and/or to assist with the move to responsible fishing e.g. inshore to offshore, different fishing gears, etc. (FAO, 2005; Béné, Macfadyen and Allison, in press). A very high proportion of policies (86 percent)

make specific reference to the need to provide subsidies. Most commonly subsidies are provided under credit provision, and/or in support of specific policy objectives e.g. exports, sustainable fisheries. The range of different forms of subsidy being used in the region is extensive. But the context in which subsidies are referred to in policy documents implies a relatively careful and specific use in many countries. For example, China and Japan both provide subsidies for vessel scrapping and job redeployment, India for fleet upgrading although amounts are modest and one-time payments, Republic of Korea for co-/community management assistance based on a system of results-based performance, Malaysia and Pakistan for specific sections of the aquaculture supply chain to support/kick-start the sector (e.g. spawning, breeding and culturing). Supporting this view of selective use of subsidies is that policy in 50 percent of countries specifically refers to either reducing or rationalizing the use of subsidies. Some examples include:

- India, where policy states that welfare “schemes operated parallelly by States and the Centre would be rationalized.”
- In Philippines policy in the form of legislation states that “All existing credit guarantee schemes and funds applicable to the agriculture and fishery sectors shall be rationalized and consolidated into an Agriculture and Fisheries Credit Guarantee Fund.”
- In Sri Lanka policy requires that “Trade distorting subsidies to fisheries shall be gradually removed.” (and see Box 6)

Box 6: Use of subsidies in Sri Lanka

Sri Lanka provides an example to illustrate how powerful a subsidized credit scheme can be on the development of small-scale fisheries. The drive for craft mechanization in the late 1950's was implemented using a high rate of subsidization of crafts (of up to 50 percent) and small-scale fishermen benefited significantly from this move. Subsidies were channelled through fisheries credit cooperatives to ensure that they reached those who needed them most. But eventually they led to over capacity and inshore subsidies were withdrawn, but provided instead for offshore multi-day fishing.

Policy now provides for targeted subsidies to “help asset-poor fishermen adopt new technology, those that lead to a shift of focus from heavily exploited to under-exploited or unexploited areas, and those granted to help certain target groups or individuals to engage in economically important and sustainable fisheries activities, shall be maintained. Subsidies granted to all non-sustainable activities shall be terminated”.

Source: Macfadyen 2003 & 2002 Policy.

All governments have limited financial resources, and sectors thus have to compete for a proportion of national budgets, with budget allocations seldom matching the level perceived by fisheries/aquaculture sector managers as necessary. This implies the need use what budget is provided in a way that is most efficient, so as to maximize its impact. Ninety-two percent of countries make reference in policy to improvements in administrative efficiency, often through institutional and human resource development, but also notably through greater levels of private/public partnerships:

- The government in Pakistan for example has increasingly recognized the important role that the private sector must play if policy is to be effective;
- In Cambodia a review of financing mechanisms is part of the ongoing reform process, as in an institutional review under the auspices of the Technical Working Group on Fisheries (TWGF), which is likely to result in the Department of Fisheries evolving into a Fisheries Administration. And sector support is increasingly being planned on a programme basis to improve institutional effectiveness;

- In China the National Economic and Social Development Programme for 2001-2005, calls for “Restructuring of ownership and corporate systems, including those of the ocean industries for improved economic efficiency”;
- Korean policy recognizes the potential role of the private sector in leveraging funds, and provides for support to “20-30 promising venture capital companies each year”; and
- In Malaysia policy states that “A review and rationalization of the existing institutional arrangements will be carried out to make them more effective in supporting development and facilitating commercialization and growth of the sector.”

As noted in the recent Fisheries Technical Paper published by FAO (de Young, 2006), the costs of fisheries management in almost all countries in the region have been rising steadily in recent years, although costs may still be relatively low compared to some other countries/regions. However, policy references to increases in user payments were found to be present in only 29 percent of policies in the region, and charges imposed on private sector operators in the region virtually never cover the public costs of management (FAO, 2006). This can be viewed as worrying, given that user charges can be used to fund measures aimed at sustainable fisheries management. The reasons for so few policies including specific reference to user charges and the need to increase them, is perhaps explained by the same socio-political context in which governments have found it difficult to restrict the inflow of capital and labour into the fisheries sector with the consequence of worsening overcapitalization and overfishing (Willmann, Boonchuwong and Piumsombun, 2003). As Willmann, Boonchuwong and Piumsombun observe, “the socio-political fisheries dilemma faced by many governments in South, Southeast and East Asia is likely to be only resolvable in an orderly and peaceful manner if adequate economic compensation could be provided to those who are required to give up their acquired rights to exploit fisheries resources, however ill-defined these rights may be at present.” Increasing user charges would be one method of ensuring that necessary funds are made available in an economically rational manner, but would itself be difficult in terms of socio-political consequences.

Key finding(s)/discussion point(s): Some aspects for consideration, raised by the text above are:

- a) In focusing on export increases, policies could be clearer about the relative emphasis/reliance on exports from large-scale and/or small-scale sectors, and the potential trade-offs and distributional aspects of trade, given the inclusion of poverty and food security as an important objective in most policy documents. What policy measures/solutions (e.g. as described in the recent Technical Guidelines to the Code of Conduct on Responsible Fisheries (CCRF) on increasing the contribution of small-scale fisheries to poverty alleviation and food security (FAOb, 2005) are most appropriate in individual countries to deal with such issues?
- b) Policy comment on value-added focuses strongly on the post-harvest sector. Would more policy-focus on value-added throughout the supply chain (e.g. in the catching/farming sectors) and in related activities be useful? What lessons can be learned from value-chain analysis? (By assessing the impacts of policies, institutions and infrastructure on the ability of businesses to source, produce, and deliver/sell products, a value-chain approach allows: an assessment of relative importance of factors affecting competitiveness (e.g. input costs, transaction costs, productivity); benchmarking against global competition; identification of gaps/weaknesses in value-chain performance; and the development of targeted action programme (for the public and private sector).
- c) The issue of tariffs is not at all well covered in policy in the region, but tariffs in export markets, especially on processed products, can have a significant impact on relative competitiveness. Would it be appropriate for fisheries-sector policy to be more specific on strategies to address such issues?

- d) Is the provision of subsidies carefully justified and the period for which they are to be used specified with an exit strategy? Is there any ongoing evaluation of their effectiveness and impacts?
- e) Can countries in the region share lessons learned about methods of improving institutional efficiency?
- f) Policy in the region does not widely include objectives/strategies to increase user charges in the sector. What socio-political solutions can be found to this problem, given the potential importance of user payments in generating resource rent for government to manage and re-structure the sector towards more sustainable exploitation?

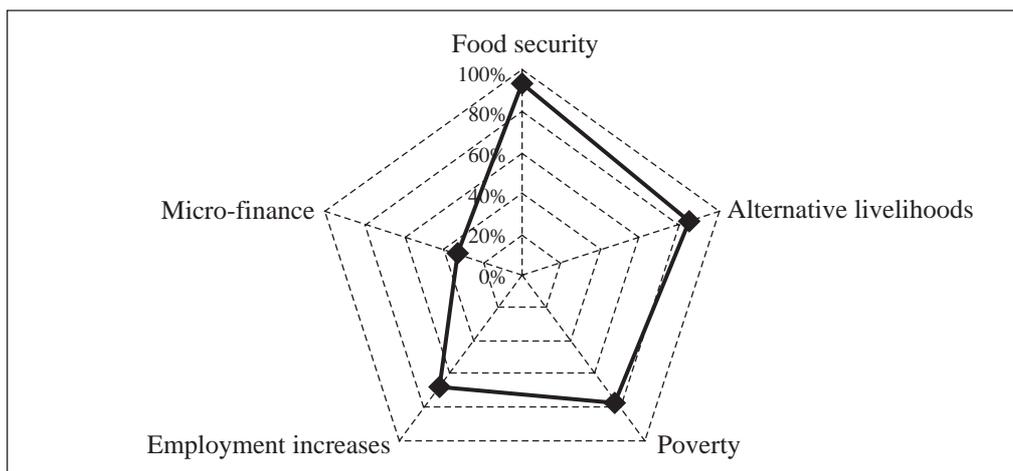


Figure 5: Socio-economic and poverty issues

2.4 Socio-economic and poverty issues

The issue of food security is included in virtually all fisheries/aquaculture policies in the region (93 percent of policies). Reasons include the obvious fact that fish is food and an important source of protein (especially where other sources of animal protein may be scarce or expensive), energy, and micronutrients. But the emphasis on food security in policy also comes from concerns about predicted rises in global population and corresponding increases in demand for food and fish, which mean that many of the food security problems present today are likely to persist⁸. At an international conference on the Sustainable Contribution of Fisheries to Food Supply held in Kyoto, Japan in 1995, the 95 participating states approved a Declaration and a Plan of Action to enhance the contribution of fisheries to human food supply. The 1996 World Food Summit stressed the connection between food security and the need for sustainable management of natural resources. The 2002 World Summit on Sustainable Development also focused on food security as a key issue and reiterated a global commitment to responsible fisheries (Béné, Macfadyen and Allison, in press). There is thus a clear relationship between sustainable fisheries management and food security, resulting in a natural inclusion of the issue in most policy documents.

As suggested by the recent FAO Guidelines to the CCRF on increasing the contribution of small-scale fisheries to poverty alleviation and food security (FAOb, 2005), the issue of food security is complex. Fish can provide for food security *directly* at the household level through fishing for consumption, and *indirectly* at both household and national levels through the generation of incomes/revenues derived from labour-wages and sales of fish, which can be used to purchase food. A country's

⁸ Estimates suggest that 840 million people globally remain classified as undernourished.

capacity to produce sufficient food to feed its population, referred to as national food self-sufficiency, is neither necessary nor sufficient to guarantee food security at the individual/household level. Some countries may be food self-sufficient, yet remain with a large proportion of their populations suffering conditions of food insecurity; other countries may not be self-sufficient yet exhibit little food insecurity due to a strong capacity to import. Food security, therefore, is brought about by a combination of individual, household, community, national and even international factors. In particular, for national self-sufficiency to ensure individual food security, it requires and presupposes efficient “trickledown” and redistribution mechanisms, and transfer-based entitlements (i.e. individual-based access to these mechanisms). Food security is also a fundamental dimension of poverty. People who are chronically poor usually lack access to adequate food. Malnutrition negatively affects peoples’ working and learning capacity, and may affect vulnerable groups living just above the poverty threshold, causing them to enter the ranks of the poor. Eliminating hunger and malnutrition, is therefore a precondition for the eradication of poverty (FAOa, 2005).

What appears evident from the review of policies in the region is that nuanced policy dealing with these different aspects of food security is still not that common. Policies tend to contain rather bland statements about food security as a key policy objective and/or expected outcome.

There is also a strong focus on poverty in fisheries/aquaculture policy in the Asian region, with poverty specifically referred to in 77 percent of policies. The level of poverty, not just in many fishing communities, but also in developing countries in general, remains high⁹. While economic growth has helped to reduce the number of poor people in the world, the positive impacts of growth on poverty have been less than expected, in part because of inequitable distribution of the benefits, population increases, political instability, and in some countries the devastating effects of the HIV/AIDS epidemic. As a result there has been a re-focusing on poverty by many NGOs, academics, development practitioners, governments, and donor agencies, for example in the form of national poverty reduction strategies. The United Nations World Summit on Sustainable Development 2002, the 2000 World Development Report published by the World Bank, the UN Millennium Declaration adopted in 2000¹⁰, and the 1996 UN World Food Summit, all considered poverty alleviation as a central priority. The re-examination of poverty alleviation strategies is also motivated by the broadening of the poverty concept, a better understanding of the causes of poverty, and the recognition of the importance of vulnerability.

While past policies and development interventions in fisheries were often implicitly aimed at reducing poverty, most were not explicitly focused on improving the living conditions of the poor. Rather, they often aimed to accelerate economic growth through technology and infrastructure development and through market-led economic policies. The lack of an explicit focus on poverty and the inequitable distributional impacts of development programmes may explain the ineffectiveness of many fishery policies and development interventions in the past. (Béné, Macfadyen and Allison, in press). Recent global focus on poverty issues, combined with the failure of many implicit rather than explicit policies to deal with poverty, help to explain the strong focus on poverty in fisheries/aquaculture policy in the region. As with food security, poverty is a high-level goal in many policies, but policies are perhaps now also more specific than in the past on the way they consider and address poverty issues, with more discussion about and linkages with:

- Welfare issues;
- Food security (e.g. in Cambodian and Vietnamese policy);

⁹ Globally around 1 000 million people are estimated to be living on less than \$1 a day; and 70 percent of the world’s poor are women.

¹⁰ The Millennium Declaration contains the commitment to halve, by the year 2015, the proportion of the world’s population whose income is less than one dollar a day.

- Benefits of community/co-management as discussed above;
- Cross-sectoral impacts (e.g. Pakistan’s policy refers to the special importance of dealing with land and water issues if poverty in the fisheries/aquaculture sector is to be effectively addressed); and
- Distributional issues (e.g. one of the goals of Sri Lankan policy is “to broaden the distribution of benefits from the fisheries sector by increasing economic livelihoods of the fisher community...”).

Employment generation is linked to poverty alleviation, and two-thirds of policies in the region specifically refer to increases in employment. Policies in Malaysia, Viet Nam and China appear to suggest a realization that increases in employment from the sector may not be possible. China’s buy-back programme over 2002-2007 is expected to arrange for 300000 fishers to be transmitted to alternative jobs. Central government is inputting around \$33million each year, with local government also contributing considerable sums in support of the programme. Few policies are specific in suggesting that overall increases in employment may have to be composed of decreases in capture fisheries sector employment offset by larger increases in employment from aquaculture. Republic of Korea’s policy is a notable example of one that recognizes reductions in capture sector employment and increases in aquaculture employment (OECD, 2002).

A high proportion of policies (85 percent) refer to alternative/supplementary employment/livelihood activities, and the promotion of alternative livelihoods has recently become a common feature of many policies. Two main approaches can be distinguished, (i) one which aims at creating supplementary livelihoods (rather than alternative ones) to reduce dependence on fishing, and (ii) approaches which aim at creating alternative livelihood opportunities outside the fishing sector (especially for those engaged in inshore fishing activities) and thus encourage people to exit from fishing activities. Both approaches are not totally exclusive, as the first alternative can also be seen as an initial step towards the creation and accumulation of sufficient capital and assets for a definitive exit out of the sector in the longer run, and the objective/motivation for both is reduced pressure on resources. But policy in the region is generally not that specific in terms of a) related strategies and actions designed to successfully achieve alternative employment creation, or b) what such alternative employment creation might be. This is perhaps because it is easy to state alternative employment as an objective, but bringing it about is not a formulaic or easy matter of just moving fishers into “basket weaving”, “eco-tourism”, or other such activities, but depends strongly on differences in cultural, social, economic and natural conditions and potentials. Cambodia’s policy seems to recognize this by stating a medium term action as “researching the potential role of rural livelihood enhancement and diversification, and livelihood alternatives to reduce the pressure on fishing resources...” (FDAP, 2005-2008, author’s emphasis).

The lack of access to affordable credit and the inability to generate savings, are major constraints for many poor small-scale fishers, fish farmers and fishworkers, who, in contrast to larger-scale entrepreneurs, often do not have easy access to credit or savings mechanisms. An emphasis on poverty alleviation in policy documents might therefore be expected to be accompanied by references to micro-finance, which has special potential for poverty alleviation as discussed below.

Informal savings schemes and credit markets are widely developed in many countries and may have positive attributes in terms of providing access to capital or assets because they are ‘closer’ to the users, more flexible, and more adapted to their needs. But the widespread use of informal credit markets and savings may be as much a function of the lack of alternative options for the poor, as of people choosing such sources per se. Governments have typically responded to these problems, with support from donor agencies, by establishing rural credit and savings institutions in the form of

cooperatives, or by forcing or encouraging commercial banks to provide cheap/subsidized credit to fisheries and other sectors. As with informal savings and credit mechanisms, such initiatives have their benefits, and there is certainly a need to increase access to general credit and savings institutions, as well as to fisheries-specific institutions. However, evidence from evaluations suggests that such formal credit programmes are often not successful, both in terms of the viability of lending institutions, and the ability of intended beneficiaries to access credit (Shetty, 2003). The problems of informal credit markets and rural credit institutions have led to a growing recognition of the importance of micro-finance as a crucial development tool for poverty alleviation. Micro-finance is the provision of a broad range of financial services such as deposits, loans, payment services, money transfers and insurance, and is characterized most commonly by small loans.

Despite the potential importance of micro-finance for poverty alleviation, a surprisingly low proportion of policies (33 percent) in the region include specific reference to it, although some countries such as Cambodia, Japan, and Pakistan are examples of countries that do. Other countries such as India and Philippines have successful micro-finance schemes even though the issue is not thought to be specifically included in formal policy (see Box 7).

Box 7: Micro-finance programmes in India and the Philippines

The National Bank for Agriculture and Rural Development (NABARD) **in India** runs what is probably the largest micro-finance programme in the world. The highlights of NABARD's programme as of March 2002 are as follows:

- Over 7.8 million poor in agriculture and other allied sectors, including fisheries and aquaculture households, are accessing banking services and micro-credits through 458000 self-help groups (SHGs). Over 2000 NGOs and 17000 branches of 444 banks are associated with the programme.
- Considering the need to upscale micro-finance interventions in the country, a micro-finance Development Fund has been set up in NABARD through initial contributions of approximately US\$20 million from the Reserve Bank of India, public sector commercial banks, and NABARD.
- Cumulative bank loans disbursed to SHGs as of 31 March 2002 stood at US\$205 million.
- Cumulative refinance by banks from NABARD for financing SHGs stood at US\$163 million as of 31 March 2002.
- More than 90 percent of SHGs have exclusively women members.
- Repayment of bank loans on time was above 95 percent from SHG members.

In the **Philippines**, the Amalbalan Women's Association (AWA), in Pangasinan, was organized in 1990 with only ten members. The women were involved with salt production/trading and fish vending. Their first loan of Peso 80000 was used as capital for these activities. This loan was followed by seven more rounds of lending with the loan size increasing to Peso 270000 by 1997, and membership increasing slightly to 22. Some women then used the loan to buy inputs for milkfish pond production such as fingerlings, fertilizers and feeds. In October 1997, the AWA was formally registered as a cooperative (AWMC), with an increased membership of 75. As a cooperative, the women were given a bigger credit line and they have taken advantage of this to increase the volume of commodities they are trading and purchase more fish pond inputs. In September 2000, AWMC took out the biggest loan since becoming a cooperative, amounting to Peso 614200. Successful repayment rates allowed them to have continuous loans, and total loans extended to the group from 1991 to 2000 amounted to Peso 3.3 million. The bigger loans have enabled the women to increase the volume of their trading activities and venture out of the province to new markets. This was helped in great measure by the "entrepreneurial" skills developed and enhanced by the project.

Source: Tietze and Villareal (2003).

Key finding(s)/discussion point(s): Analysis of some important socio-economic and poverty issues included in policy raises the following questions and observations:

- a) Would ‘better’ policy be possible with a more nuanced consideration of policy objectives and strategies related to food security?
- b) Is it really appropriate to have employment increases as a policy objective in a sector with such obvious resource problems, especially when policy may also contain commitments to capacity reduction and the importance of alternative employment/livelihoods?
- c) An objective of alternative employment activities is included in many policies, but with insufficient attention to the potential difficulties of realizing this objective. What are the key success factors in moving people out of fisheries into other sectors?¹¹
- d) Micro-finance can be a useful tool in supporting poverty alleviation. Because of the diversity of the demand for and suppliers of micro-finance services, it is not possible to prescribe or subscribe to a particular methodology or an institutional mechanism. Lending methodologies and procedures must be carefully tailored so that they appropriately serve the financial needs of the fishing, trading and fish farming communities concerned. But case studies of success stories may be useful in providing specific guidelines or examples of best practice.

3. Overall conclusions

This paper has reviewed policy in 14 Asian countries to assess policy content, trends, and drivers. Under different sections on the use of targets, natural resource management issues, financial/economic and marketing issues, and socio-economic and poverty issues, the extent to which particular issues are included in policy has been reviewed to assess the extent to which different issues are included in policy in the region. The analysis has allowed for a regional synthesis to be presented, and for some key observations and discussion points to be proposed in Section 2. In addition some more general conclusions can be drawn as follows:

1. For most issues considered, a surprisingly large number of national policies include them. Of 31 issues considered, 27 of them are included in 50 percent or more of policy documents, and 19 in more than 70 percent of policies;
2. Most countries have what might be termed “good policy content” or “best practice” contained with policy. It is clear that donor projects and support, along with recent international action on key issues, have been helpful in important issues finding their way into policy. But this can only happen with governments being receptive. Governments in the region have in their own right, and based on their own initiatives, increasingly recognized and formulated ‘good’ policy. Drivers for good policy come partly from internal national experience, but also from the sharing between policy planners and managers of their experiences and lessons learned, both within a regional context, and internationally;
3. Many policy issues are inter-related, sometimes in a complementary way, and sometime in a conflictual way. Few policies are very specific about potential trade-offs in policy objectives and content e.g. policy may contain references to sustainable management of capture fisheries as well as increasing production and employment, or to maximizing exports and food security;

¹¹ For example, the ‘CHARM project’ in Thailand provided revolving funds for supplementary/alternative livelihoods but failed to provide technical support or sufficient recognition of livelihoods outside of the sector (Banks, Bradley and Promrucksas, 2005).

4. While policy content is crucial as the starting point for good planning and management of the sector, this paper has not reviewed the extent to which policy is being implemented. Certainly within the region there are clear challenges and constraints in terms of budgets, human and institutional capacity, political will, and social and cultural constraints, many of which are likely to be raised by others during the APFIC forum. What the policy review does suggest is that some policy objectives and content may be based more on an ideal situation than on a realistic assessment of potentials. Examples raised earlier include a) greater exploitation of offshore resources when resources themselves may not be as significant as hoped, and b) plans to increase aquaculture production, which may be more difficult than thought given issues of disease and land availability;
5. The level of detail in policy documents varies considerably between countries. This is not surprising as there is something of a gray line between where policy stops and planning for implementation begins. For policy to be implemented successfully, policy goals, objectives, strategies and activities must be linked in a coherent manner, and where possible planning for implementation should feature time-bound responsibilities and indicators of success, not just for high-level policy goals but for all proposed activities. Cambodia and Pakistan are two countries that provide good examples of where such detailed planning is taking place;
6. Finally, policy is reviewed relatively often in most countries, typically every five years with an associated annual planning process. While legislation may take longer to change, formal planning processes, as well as the ability to make informal policy and planning decisions, provide considerable scope for countries to continue their progress towards policy containing ideas/issues representing best practice but which fit the specific needs of the individual country concerned.

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Individual country information on policy content

Table Template

	Policy Issue/Question	Answer	Supporting Reference
Section A: Policy Targets/Indicators			
1a.	Does policy contain specific development <i>targets</i> for capture fisheries?		
1b.	If so, pls elaborate.		
2a.	Does policy contain specific management <i>targets</i> for capture fisheries? e.g. area under MPAs, etc.		
2b.	If so, pls elaborate.		
3a.	Does policy contain specific development <i>targets</i> for aquaculture?		
3b.	If so, pls elaborate.		
4a.	Does policy contain specific management <i>targets</i> for aquaculture?		
4b.	If so, pls elaborate.		
5a.	Does policy contain any other specific <i>targets</i> or <i>indicators</i> e.g. value of exports?		
5b.	If so, what are they. (List all)		
6.	Is there a sense in development targets that aquaculture is more, less, or as important as capture fisheries production?		
Section B: Natural Resource Management			
1.	Does policy include the use of fishery co-management and/or community management?		
2.	Does fisheries policy (as opposed to national non-sectoral policy) specifically provide for decentralization/devolution of management powers and responsibilities?		
3a.	Does policy include attempts to expand national offshore fisheries e.g. through the use of larger vessels?		
3b.	If so, is such expansion at the expense of any foreign fishing interests currently operating in the country.		
4.	Does policy encourage the movement of small-scale fisheries into offshore areas, due to resource constraints and technical improvements/efficiencies?		
5a.	Does policy specifically recognize and address any issues of over capacity?		
5b.	If so, what and how.		
6a.	Does policy refer to and/or deal with IUU fishing?		
6b.	If so, in what way.		
7a.	Is policy attempting to introduce user rights to fishers?		
7b.	If so, how and in what way.		
8.	Does policy refer to need for integration/coordination with other sectoral policies?		
9a.	Does policy mention ecosystems management?		
9b.	If so, what measures are suggested.		
10.	Does policy include the use of MPAs?		
11a.	Does policy include specific measures related to conflict management?		
11b.	If so, what are they.		
Section C: Financial/economic and marketing issues			
1a.	Does policy provide for the provision of subsidies?		
1b.	What are the main form of “good” subsidies provided?		
1c.	If so, what are the main forms of “bad” subsidy provided and what is their time frame. (pls use your own judgment to decide whether subsidies (e.g. training, social support, boat building, fuel, etc.) are good or bad)		

Policy Issue/Question		Answer	Supporting Reference
2.	Is there an overall thrust/trend towards reducing or increasing the level of subsidy provided?		
3.	Does policy include increasing attempts to introduce user payments e.g. charges imposed on the fishing industry?		
4.	Does fisheries policy include mention of the need to support the traceability and/or certification of products?		
5a.	Does policy refer to increasing value-added?		
5b.	If so, how is this to be achieved.		
6.	Does policy refer to tariff barriers and/or free trade areas in the region?		
7.	Does policy seek to increase exports?		
8a.	Are there any specific policy initiatives to improve the efficiency of fisheries administrations? e.g. public/private partnerships		
8b.	If so, pls elaborate.		
Section D: Socio-economic and poverty issues			
1a.	Does policy refer to issues of poverty?		
1b.	If so, in what capacity e.g. references to PRSPs, non-fisheries sector poverty reduction strategies, etc.		
2.	Does policy include mention of, or provide for, micro-finance?		
3.	Does policy include reducing the number of those engaged in fishing maintaining current numbers, or increasing/maximizing employment?		
4.	Does policy include assistance to fishers to leave the fisheries sector or to supplement livelihoods from non-fishing activities?		
5a.	Does policy refer to food security?		
5b.	If so, to what extent (if at all) is policy specific about whether fisheries should provide direct food security (i.e. fish being consumed domestically) or indirect food security (fish exported with money then available for food imports).		
Section E: Overall impression of policy trends			
In summary, what are the main <i>trends and changes</i> in fisheries policy over the past 10 years. Please also consider in the response to this question that the seriousness with which a certain policy is pursued can often be measured by the share of the budget allocated to it, or by whether it finds expression in specific legislation or regulations.			

Bangladesh

Policy Issue/Question		Answer	Supporting Reference
Section A: Policy Targets/Indicators			
1a.	Does policy contain specific development <i>targets</i> for capture fisheries?	Not in NFP, but production increases are a key objective of the policy and 5 year plans have production targets	NFP, Mazid
1b.	If so, pls elaborate.		
2a.	Does policy contain specific management <i>targets</i> for capture fisheries? e.g. area under MPAs, etc.	No	
2b.	If so, pls elaborate.		
3a.	Does policy contain specific development <i>targets</i> for aquaculture?	Not in NFP, but production increases are a key objective of the policy and 5 year plans have production targets	NFP, Mazid
3b.	If so, pls elaborate.		
4a.	Does policy contain specific management <i>targets</i> for aquaculture?	No	
4b.	If so, pls elaborate.		
5a.	Does policy contain any other specific <i>targets</i> or <i>indicators</i> e.g. value of exports?	No, although M&E Strategy implies that such indicators should be specified	Draft M&E Strategy 2004
5b.	If so, what are they. (List all)		

Policy Issue/Question		Answer	Supporting Reference
6.	Is there a sense in development targets that aquaculture is more, less, or as important as capture fisheries production?	Boost in production under current 5-yr plan is expected to come from aquaculture more than capture fisheries.	Mazid
Section B: Natural Resource Management			
1.	Does policy include the use of fishery co-management and/or community management?	Not in policy per se, but Yes in recent action plan – “The local fishing community will be encouraged to form a fishing community based organization (FCBO) to formulate and implement a fisheries management plan.” Communities also to be used in enforcement activities. However, co-/community management activities are currently strongly driven/supported by donors and NGOs	Marine Action Plan V1. doc Macfadyen et al., 2005
2.	Does fisheries policy (as opposed to national non-sectoral policy) specifically provide for decentralization/devolution of management powers and responsibilities?	Decentralization is not explicitly addressed in fisheries policy documents and at present, the government system in Bangladesh is primarily “de-concentrated” rather than “devolved”.	Macfadyen et al., 2005
3a.	Does policy include attempts to expand national offshore fisheries e.g. through the use of larger vessels?	Yes. “Develop resource assessment methodologies to identify new fisheries potentials. Establish plan to collect information on deep water fishes”	Marine Action Plan V1. doc
3b.	If so, is such expansion at the expense of any foreign fishing interests currently operating in the country.	b. ?	
4.	Does policy encourage the movement of small-scale fisheries into offshore areas, due to resource constraints and technical improvements/efficiencies?	Yes. “From the shoreline to 1 kilometre fishing will be banned extending to 5 metre depth as implementation is achieved”. “50 metre from estuary shoreline. At mouth point of the estuary fishing will be prohibited”. “Artisanal fisheries will operate from the 5 metre depth line”. Policy states that “Small-scale fisheries contribute about 95 percent of the total fish harvested from the marine water. Emphasis will be given to the small-scale fisher folk communities in the coastal areas”, and that “Small-scale fishers in the coastal region will get fish harvesting rights. A separate fish harvest area will be demarcated for the small and large-scale fishers.”	Marine Action Plan V1. doc NFP
5a.	Does policy specifically recognize and address any issues of over capacity?	Not in policy but yes in action plan. “Based on the assessment of the resource prepare national allocation for the total number of mechanized commercial boats permitted”, and “Distribute allocated numbers across the districts where boats are traditionally harboured”.	Marine Action Plan V1. doc
5b.	If so, what and how.		
6a.	Does policy refer to and/or deal with IUU fishing?	Yes. “International collaboration with navy and coast guard to guard fishing rights against foreign illegal fishing.	Marine Action Plan V1. doc
6b.	If so, in what way.	International protocols IUU Fishing”.	
7a.	Is policy attempting to introduce user rights to fishers?	Yes through the proposition that “Artisanal fishers will be encouraged to manage their local resource by being allocated fishing in the area between 5-metre depth and 10-metre depth”. And “Fishing permits together with Identification Cards should be issued by FCBO in conjunction with local DoF (MFO).	Marine Action Plan V1. doc
7b.	If so, how and in what way.		

Policy Issue/Question		Answer	Supporting Reference
8.	Does policy refer to need for integration/coordination with other sectoral policies?	Yes. Draft M&E Strategy lists guiding policy documents, and this includes 9 policy documents in other sectors e.g. women, land, water, and environment. And Action Plan provides for “Support the formation of a Natural Resource Coordination Committee and Fisheries Management Executive Committee to support national planning of marine sector”.	Draft M&E Strategy 2004 Marine Action Plan V1. doc
9a. 9b.	Does policy mention ecosystems management? If so, what measures are suggested.	Not specifically. But one of policy objectives is “Maintain ecological balance, conserve biodiversity and improve public health”. And NFP and other related policy documents have a strong emphasis on biodiversity.	Draft M&E Strategy 2004, NFP
10.	Does policy include the use of MPAs?	Yes, thought to be include in legislation.	Legislation
11a. 11b.	Does policy include specific measures related to conflict management? If so, what are they.	Indirectly through “Existing Marine Fisheries Ordinance of 1983 should be enforced which restrict industrial vessels to the waters beyond 40 metres”, and “Small-scale fishers in the coastal region will get fish harvesting rights. A separate fish harvest area will be demarcated for the small and large-scale fishers.” But no conflict resolution measures.	Marine Action Plan V1. doc NFP
Section C: Financial/economic and marketing issues			
1a. 1b. 1c.	Does policy provide for the provision of subsidies? What are the main form of “good” subsidies provided? If so, what are the main forms of “bad” subsidy provided and what is their time frame. (pls use your own judgment to decide whether subsidies (e.g. training, social support, boat building, fuel, etc.) are good or bad)	Under policy for credit, NFP states that “Shrimp sector as the important export orientated industry, credit to shrimp culture shall be on low interest rates, income tax free and shall have tax holiday”. Government support takes a number of forms including direct tax breaks (tax holidays, accelerated depreciation, reduced rates of income tax), reductions in indirect tax (e.g. VAT, statutory duty, customs duty, etc.), funding for development projects, and banking sector support in the form of reduced interest rates. For shrimp, Govt. provides 10 percent cash incentive against shrimp export, has declared shrimp aquaculture as tax free earning, and import tax exempted for shrimp industry related equipments, medicine and chemicals.	NFP
2.	Is there an overall thrust/trend towards reducing or increasing the level of subsidy provided?	–	
3.	Does policy include increasing attempts to introduce user payments e.g. charges imposed on the fishing industry?	Not really, except small licence fees. But cost recovery is minimal, with no licenses being issued for 94 percent of the marine capture sector (by volume of landings).	FAO Country Review
4.	Does fisheries policy include mention of the need to support the traceability and/or certification of products?	Yes, under policy of transportation and marketing, “Cold-chain system will be established in fish marketing. Businesspersons will be encouraged to establish cold-chain based marketing systems.”	NFP

Policy Issue/Question		Answer	Supporting Reference
		Bangladesh has initiated a Seal of Quality Program with the assistance of the Agro-based Industry and Technology Development Project. The focus of the SSOQ is an industry-led set of standards.	
5a. 5b.	Does policy refer to increasing value-added? If so, how is this to be achieved.	Yes, policy has specified actions relating to: <ul style="list-style-type: none"> • “Establishment of hygienic fish landing centers”. • “Transportation and marketing”. • “Fish Processing- and Quality-Control” including “Value-Added Products of frozen fish will be strengthened for local and international markets”. • “Exports including “Technologies related to produce different value-added products would be encouraged, based on international demand”. 	NFP
6.	Does policy refer to tariff barriers and/or free trade areas in the region?	No.	
7.	Does policy seek to increase exports?	Yes. One of policy objectives is “Achieve economic growth and earn foreign currency by exporting fish and fisheries”. Specific policy actions include: <ul style="list-style-type: none"> • Quality control system of the Department of Fisheries will be strengthened through the implementation of quality control laws on processed fisheries products. • All fish processing plants should have their own quality control systems. Strict punishment will be taken against the exporters and owners of the plants in case of exporting below standard products. • Emphasis will be given to export shrimp of different species, fish, turtles and other aquatic species instead of existing 2 or 1 shrimp species. • Differentiation and diversification of the presentation of processed products of shrimp, fish, turtle, etc. will be initiated. Technologies related to produce different value-added products would be encouraged, based on international demand. Govt. has set up an export promotion bureau and works closely with the Bangladesh Frozen Food Exporters Association (BFFEA).	Draft M&E Strategy 2004 NFP
8a. 8b.	Are there any specific policy initiatives to improve the efficiency of fisheries administrations? e.g. public/private partnerships If so, pls elaborate.	Some. Many throughout policy document on issues such as hatchery and shrimp farming, research, exports, facility improvements, extension, etc., to ensure that private sector involved wherever possible.	NFP
Section D: Socio-economic and poverty issues			
1a. 1b.	Does policy refer to issues of poverty? If so, in what capacity e.g. references to PRSPs, non-fisheries sector poverty reduction strategies, etc.	Yes. One objective of fisheries policy is “Poverty alleviation through creating self-employment and improvement of socio-economic conditions of the fishers”.	Draft M&E Strategy 2004

Policy Issue/Question		Answer	Supporting Reference
2.	Does policy include mention of, or provide for, micro-finance?	No, but credit yes. “Sources of credit will be identified that will enable fishers to upgrade fishing technologies that help them fulfil the requirement of the Fisheries Management Plan”. The NFP has a number of actions specified under the heading of Fisheries Credit Policy to ensure access to credit by the poor at affordable interest rates.	Marine Action Plan V1. doc NFP
3.	Does policy include reducing the number of those engaged in fishing maintaining current numbers, or increasing/maximizing employment?	Policy objective is to “Poverty alleviation through creating self-employment and improvement of socio-economic conditions of the fishers”. “Credit programme to alleviate poverty and generate employment”. “Cooperation will be extended to lease out existing un-utilized khas ponds, lakes and water bodies to the trained unemployed youths”.	NFP
4.	Does policy include assistance to fishers to leave the fisheries sector or to supplement livelihoods from non-fishing activities?	Yes. AIGA will be identified to encourage fishers to seek alternative employment and reduce the fishing pressure.	Marine Action Plan V1. doc
5a. 5b.	Does policy refer to food security? If so, to what extent (if at all) is policy specific about whether fisheries should provide direct food security (i.e. fish being consumed domestically) or indirect food security (fish exported with money then available for food imports).	Yes. One of policy objectives is “Meet the demand for animal protein”. Not specific about direct or indirect.	Draft M&E Strategy 2004
Section E: Overall impression of policy trends			
In summary, what are the main <i>trends and changes</i> in fisheries policy over the past 10 years. Please also consider in the response to this question that the seriousness with which a certain policy is pursued can often be measured by the share of the budget allocated to it, or by whether it finds expression in specific legislation or regulations. No management plans exist.			

Cambodia

Policy Issue/Question		Answer	Supporting Reference
Section A: Policy Targets/Indicators			
1a.	Does policy contain specific development <i>targets</i> for capture fisheries?	Did in 2001-2006 5 year plan, but not any more	FDAP, Donnelly Pers. Comm.
1b.	If so, pls elaborate.		
2a.	Does policy contain specific management <i>targets</i> for capture fisheries? e.g. area under MPAs, etc.	<ul style="list-style-type: none"> • At least 50 maps of fishing lots, public fisheries domain and areas for community fisheries will be prepared and printed. • Establishing a conservation site in each community fisheries and limit fishing violations within the community fisheries. • More than 30 ha of lake and canal will be renovated. • 20 new conservation sites will be defined. <p>Indicators/targets for 2006 include:</p> <ul style="list-style-type: none"> • Development of existing fish sanctuaries and assessment of 36 deep pools in Kratie and Stung Treng to determine suitable conservation areas. • 20 maps indicating clear boundaries of flooded forest produced • Existing community fisheries strengthened and new seventy five (75) community fisheries established. 	FDAP 2005-2008
2b.	If so, pls elaborate.		www.twgf.org on monitoring indicators for 2006
3a.	Does policy contain specific development <i>targets</i> for aquaculture?	Did in 2001-2006 5 year plan, but not any more	Donnelly Pers. Comm.
3b.	If so, pls elaborate.		
4a.	Does policy contain specific management <i>targets</i> for aquaculture?	No	
4b.	If so, pls elaborate.		
5a.	Does policy contain any other specific <i>targets</i> or <i>indicators</i> e.g. value of exports?	Number of community fisheries – currently 480 organizations throughout the country.	FDAP, Donnelly Pers. Comm.
5b.	If so, what are they. (List all)		
6.	Is there a sense in development targets that aquaculture is more, less, or as important as capture fisheries production?	No relative importance attached to either sector in FDAP or FAP for 2006.	FDAP/FAP 2006
Section B: Natural Resource Management			
1.	Does policy include the use of fishery co-management and/or community management?	<p>Yes. Policy includes statement that “Encouraging the effective establishment of community fisheries in inland and coastal areas in order to enhance the management of sustainable fisheries resources by empowering local communities”.</p> <p>One of 6 priority actions in FDAP is “Community based fisheries management to promote local participation in fisheries management linked to livelihood diversification”.</p> <p>In October 2000, Prime Minister Hun Sen initiated a reform of the fisheries sector and announced the release of 56 percent of the fishing lots from private control to be used by community fisheries.</p>	<p>RGC Statement on Policy</p> <p>FDAP 2005-2008</p> <p>Macfadyen et al., 2005</p>

Policy Issue/Question		Answer	Supporting Reference
		Sub-Decree on Community Fisheries Management promotes co-management of fisheries resources. It provides the rules and procedures for establishing and managing community fisheries throughout Cambodia.	Sub-Decree on Community Fisheries Management
2.	Does fisheries policy (as opposed to national non-sectoral policy) specifically provide for decentralization/devolution of management powers and responsibilities?	Yes. FDAP states that “Institutions also need to be reformed to ensure effective management from the central through to the local level and for a sound legislative basis for ensuring that access rights to both land and aquatic resources are effectively protected in law”. Strong emphasis on local fisheries councils for community management. And in March 2001, the King promulgated the Law on Administration of Communes (Khum/Sangkat) and the Commune Election Law, which provided the legal framework for the establishment of elected councils in Cambodia’s 1621 communes and sangkat in February 2002. The goal of commune administration is the promotion of good governance through the sustainable utilization of local resources to satisfy people’s basic needs for present and future generations (Article 41 of the Law on Administration of Communes).	FDP 2005-2008 Macfadyen et al., 2005
3a.	Does policy include attempts to expand national offshore fisheries e.g. through the use of larger vessels?	No.	
3b.	If so, is such expansion at the expense of any foreign fishing interests currently operating in the country.		
4.	Does policy encourage the movement of small-scale fisheries into offshore areas, due to resource constraints and technical improvements/efficiencies?	No.	
5a.	Does policy specifically recognize and address any issues of over capacity?	No.	FDAP
5b.	If so, what and how.		
6a.	Does policy refer to and/or deal with IUU fishing?	Yes. Policy states that “Revising and disseminating regulations for law enforcement and crackdown of all illegal fishing activities and preserving the inundated forest”, and FDAP includes references to improved law enforcement and reducing use of illegal fishing gears.	RGC Statement on Policy FDAP
6b.	If so, in what way.		
7a.	Is policy attempting to introduce user rights to fishers?	FDAP refers to “ensuring that access rights to both land and aquatic resources are effectively protected in law”, and focuses on community “rights”.	FDAP
7b.	If so, how and in what way.		
8.	Does policy refer to need for integration/coordination with other sectoral policies?	Yes. FDAP refers to “cross-sectoral approaches into Department of Fisheries’ strategies to enable fisheries to work in harmony with other sectors such as agriculture, forestry and water management”.	FDAP

Policy Issue/Question		Answer	Supporting Reference
9a.	Does policy mention ecosystems management?	No, although policy refers for need to improve environmental degradation.	FDAP
9b.	If so, what measures are suggested.		
10.	Does policy include the use of MPAs?	FDAP refers to “lot, protected areas, reservoirs, and community fisheries refuge ponds”. Fisheries Law also refers to fish sanctuaries.	FDAP Fisheries Law
11a.	Does policy include specific measures related to conflict management?	Yes. Fishing lot reforms “were initiated by Prime Ministerial decree and aimed to the growing conflicts between private fishing lot owners and rural people regarding access to fishing areas.”, and one expected result of policy implementation is “Conflicts over resource access will be reduced and livelihoods of fish folk are improved”. Fisheries Law also refers to conflict resolution of utilization of fishing areas.	FDAP Fisheries Law
11b.	If so, what are they.		
Section C: Financial/economic and marketing issues			
1a.	Does policy provide for the provision of subsidies?	No.	FDAP
1b.	What are the main form of “good” subsidies provided?		
1c.	If so, what are the main forms of “bad” subsidy provided and what is their time frame. (pls use your own judgment to decide whether subsidies (e.g. training, social support, boat building, fuel, etc.) are good or bad)		
2.	Is there an overall thrust/trend towards reducing or increasing the level of subsidy provided?	–	–
3.	Does policy include increasing attempts to introduce user payments e.g. charges imposed on the fishing industry?	No.	FDAP
4.	Does fisheries policy include mention of the need to support the traceability and/or certification of products?	Not specifically. Although a medium action is “Developing and operating a domestic and export quality assurance system and associated facilities.” And an EU-Cambodia project starting August 1 st has stated project purposes. To provide 1) Technical Assistance (TA) to the Royal Government of Cambodia (RGC) on the basic practices for managing at international and regional levels the Standardization, Accreditation, Testing and Conformity Assessment procedures and infrastructure. 2) To encourage the national authorities to transfer to the private sector the knowledge acquired through the project (mainly in the areas of GMP and HACCP).	FDAP http://www.twgf.org
5a.	Does policy refer to increasing value-added?	Not specifically, although there are specified post-harvest actions which would help to increase value-added.	FDAP
5b.	If so, how is this to be achieved.		
6.	Does policy refer to tariff barriers and/or free trade areas in the region?	No.	

Policy Issue/Question		Answer	Supporting Reference
7.	Does policy seek to increase exports?	Yes. One of the objectives of the post-harvest fisheries programme in the FDAP is “Developing appropriate post-harvest policies and plans for the domestic and export industries to support and guide these activities.” And a medium action is “Developing and operationalising a domestic and export quality assurance system and associated facilities.”	FDAP
8a. 8b.	Are there any specific policy initiatives to improve the efficiency of fisheries administrations? e.g. public/private partnerships If so, pls elaborate.	<p>Yes, review of financing mechanisms is part of ongoing reform process, as is institutional review of DoF carried out under the auspices of the Technical Working Group on Fisheries (TWGF). And one priority action areas of FDAP 2005-2008 is “reviewing, revising and improving the policy, plans, legislation, institution and capacity (human and physical) of the Fisheries sector”.</p> <p>And through training of personnel, reform of administration, and emphasis on private sector through policy goal 4 which states that “Providing effective and adequate support is provided to help private sector development and expansion in fisheries, in particular aquaculture where Cambodia has significant comparative advantages”.</p> <p>RCG policy statement includes measures to promoting human resource development within the fisheries sector to: “ensure quality service within fisheries in order to improve socio-economic development; Providing training courses on fisheries and fisheries related laws to ensure awareness of all regulations and fisheries management processes; Encouraging and promoting fisheries research programmes”.</p> <p>And note DoF moving to being a fisheries administration.</p>	<p>FDAP</p> <p>RGC Statement on Policy</p> <p>Post-harvest Sector Guidance</p>
Section D: Socio-economic and poverty issues			
1a. 1b.	Does policy refer to issues of poverty? If so, in what capacity e.g. references to PRSPs, non-fisheries sector poverty reduction strategies, etc.	<p>Strategy is devoted to fisheries reforms which aim is law enforcement, making action plans, and strengthening all relevant institutions to achieve the national goals of environmental fisheries protection, conservation of biodiversity, socio-economic development, good governance and poverty alleviation. And policy includes “Managing and utilizing sustainable fisheries resources to enhance food security and food safety and to contribute to poverty alleviation”.</p> <p>Poverty reduction (expressed in terms of food security and socio-economic development) is identified as a priority in fisheries sector policies where these elements are seen as part of a strategy ultimately to enhance livelihoods and to enhance the nation’s prosperity.</p>	<p>RGC Statement on Policy</p> <p>Post-harvest Sector Guidance</p>

	Policy Issue/Question	Answer	Supporting Reference
		<p>The goal of the fisheries sector is to maximize the contribution of fisheries to the achievement of national development objectives especially those related to improving rural livelihoods <i>of the poor</i>, enhancing food security and the sustainable development and equitable use of the fisheries resource base. The action plan aims to achieve this goal taking into account the wider policy framework defined by the Socio-economic Development Plan and the <i>Poverty Reduction Strategy</i>, and reflecting the requirement of the Government Rectangular Strategy.</p> <p>FDAP refers to “poor” 9 times and “poverty” 4 times. Key aspect of recent forms have been fishing lot reforms to benefit small-scale fishers.</p>	FDAP 2005-2008
2.	Does policy include mention of, or provide for, micro-finance?	Yes, FAP for 2006 refers to “pilot interventions in micro-finance and “commence four (4) programmes to improve access to micro-finance service.”.	FAP 2006
3.	Does policy include reducing the number of those engaged in fishing maintaining current numbers, or increasing/maximizing employment?	Increasing. One of 6 priority action areas in FDAP aims to “Improving livelihood of poor rural people <i>by enhancing</i> the role of fish in food security, <i>employment</i> and income generation...”.	FDAP
4.	Does policy include assistance to fishers to leave the fisheries sector or to supplement livelihoods from non-fishing activities?	Yes. On medium term action is “Researching the potential role of rural livelihood enhancement and diversification, and livelihood alternatives to reduce the pressure on fishing resources from the growing rural population and collaborating with other agencies to develop these livelihood options.” And “The poverty reduction strategy suggests that the future development of the fishery must be tackled on four fronts: 1. Increasing alternative livelihoods in order to decrease exploitation of the fishery resources...”.	FDAP
5a. 5b.	Does policy refer to food security? If so, to what extent (if at all) is policy specific about whether fisheries should provide direct food security (i.e. fish being consumed domestically) or indirect food security (fish exported with money then available for food imports).	<p>Yes. The Vision for the Fisheries Sector is: “Management, conservation, and development of sustainable fisheries resources to contribute to ensuring people’s <i>food security</i> and to socio-economic development in order to enhance people’s livelihoods and the nation’s prosperity”.</p> <p>And policy includes “Managing and utilizing sustainable fisheries resources to enhance food security and food safety and to contribute to poverty alleviation”.</p> <p>The goal of the fisheries sector is to maximize the contribution of fisheries to the achievement of national development objectives especially those related to improving rural livelihoods of the poor, <i>enhancing food security</i> and the sustainable development and equitable use of the fisheries resource base. And on the 6 priority action areas in the FDAP includes enhancing the role of fish in food security.</p>	RGC Statement on Policy FDAP 2005-2008

Policy Issue/Question	Answer	Supporting Reference
Section E: Overall impression of policy trends		
Key aspect of recent forms have been fishing lot reforms. Recent policy planning strongly supported by donors.		
Important to note that:		
<ol style="list-style-type: none"> 1) That policy in the sector is influenced by the mandate of the DoF as defined by legislation and is changing as DoF moves towards being a Fisheries administration. 2) That it is subservient to the Rectangular Strategy of the government which in turn provides the basis for the National Strategic Development Plan, the Public Investment Plan and the Medium-Term Expenditure Framework. 3) Fisheries policy is also influenced by policies from a range of other sectors that relate to a range of cross-cutting issues such as food security, gender, poverty reduction, food safety, WTO etc. 4) Fisheries policy is also influenced by international obligations and commitments, not least of these is the CCRF. Cambodia is currently implementing a self-assessment of the implementation of the Code. 5) DoF is also moving much more to a people-centered service delivery agency and is putting policy-influencing mechanisms in place that allow greater feedback from communes and communities into the policy process. 6) DoF has also started to embark upon a process of sub-sector policy guidance which feeds into sector policy and reflects the realities of changes in the sub-sector and in the livelihoods of those who depend upon the sector. 		
The aim of the ongoing reform programme is to fully implement the policy and institutional reforms needed to create an efficient and effective institution capable of supporting and promoting service delivery to a decentralized government system in line with Royal Government of Cambodia's (RGC) fisheries policy. The FRP is embedded in the Fisheries Development Action Plan (FDAP) (2005-2008) and, specifically, the Fisheries Action Plan 2006 (Appendix 1) which has been agreed by the Technical Working Group on Fisheries (TWGF) which, in turn, reflects the NSDP. The FRP also responds to the Department's response to the Government's Action Plan for Harmonization and Alignment by reviewing and addressing institutional effectiveness and moving the support to the sector towards a more programmatic approach.		

China

Policy Issue/Question	Answer	Supporting Reference
Section A: Policy Targets/Indicators		
1a. Does policy contain specific development <i>targets</i> for capture fisheries? 1.b. If so, pls elaborate.	Production targets for 2005 = 46 million tonnes (total capture and culture), aquaculture = 67%, capture = 33%.	10 th 5-yr plan
2a. Does policy contain specific management <i>targets</i> for capture fisheries? e.g. area under MPAs, etc. 2b. If so, pls elaborate.	Closes area and seasons in the coastal areas, but not sure if these there are targets associated with these measures.	
3a. Does policy contain specific development <i>targets</i> for aquaculture? 3b. If so, pls elaborate.	Production targets for 2005 = 46 million tonnes (total capture and culture), aquaculture = 67%, capture = 33%.	10 th 5-yr plan
4a. Does policy contain specific management <i>targets</i> for aquaculture? 4b. If so, pls elaborate.	No.	
5a. Does policy contain any other specific <i>targets</i> or <i>indicators</i> e.g. value of exports? 5b. If so, what are they. (List all)	Exports, but again not sure if these there are targets associated.	
6. Is there a sense in development targets that aquaculture is more, less, or as important as capture fisheries production?	Emphasis is more on aquaculture expansion, and capture fisheries management/protection with increase in offshore fishing.	White Paper

Policy Issue/Question	Answer	Supporting Reference	
Section B: Natural Resource Management			
1.	Does policy include the use of fishery co-management and/or community management?	No.	
2.	Does fisheries policy (as opposed to national non-sectoral policy) specifically provide for decentralization/devolution of management powers and responsibilities?	<p>Article 6 of Law of 1986 specifies that “Departments of Fishery Administration under people’s governments at or above the county level and their fishery superintendency agencies may appoint fishery inspectors who will carry out assignments that those departments and agencies entrust to them”.</p> <p>Article 7 of the same Law states that “State superintendence of fisheries shall operate under the principle of unified leadership and decentralized administration. Marine fishery shall be under the superintendence of departments of fishery administration under the people’s governments of provinces, autonomous regions and centrally-administered municipalities contiguous to the sea, with the exception of those sea areas and fishing grounds with specially designated fishery resources that the State Council has put under direct administration of its fishery department and subordinate fishery superintendency agencies”.</p> <p>In 2001 Law Article 10 states that “The department in charge of marine administration under the State Council shall, in conjunction with the departments concerned and the people’s governments of coastal provinces, autonomous regions, and municipalities directly under the Central Government work out marine function zoning plans”.</p>	<p>Pers. Comm. Jin</p> <p>Law 1986</p> <p>2001 Law</p>
3a.	Does policy include attempts to expand national offshore fisheries e.g. through the use of larger vessels?	Yes (“China will...rationally develop and protect the offshore areas”) and distant water fishing in particular.	1998 White Paper
3b.	If so, is such expansion at the expense of any foreign fishing interests currently operating in the country.	Article 14 of 1986 law states that “The state shall encourage and support the development of offshore and deep-sea fisheries and make rational arrangement of fishing capacity for inland and inshore fisheries”.	PEMSEA, 2003 1986 Law
4.	Does policy encourage the movement of small-scale fisheries into offshore areas, due to resource constraints and technical improvements/efficiencies?	No.	Pers. Comm. Jin
5a.	Does policy specifically recognize and address any issues of over capacity?	Yes as there is Fishing Vessel and Power Control Quota for Marine Capture Fisheries. In addition, In 2002, China started to carry out policy of “minus growth” for catch of marine and inland capture fisheries. In order to achieve the goal of minus growth of her marine fishery catch, China started a 5-year buy back program in 2002. According to the program, China would reduce 30000 fishing vessels.	FAO Country Review
5b.	If so, what and how.		

Policy Issue/Question		Answer	Supporting Reference
6a.	Does policy refer to and/or deal with IUU fishing?	Yes. With respect to the domestic IUU there were 104200 vessels operated in the marine water of China in 2000. From that year, China has taken steps to deter the IUU fishing activities based on the principle of “Bring into Management and Treating Differently”. By the end of 2002, 92000 vessels have been brought into management and over 10000 vessels have been scrapped or used for other no fishing purposes. With respect to the vessels operated on high seas, in particular for tuna longline vessels, China conducted investigations on the business relation between present Chinese owners and the fishermen having been or being engaged in IUU fishing activities. China submitted a progress report on the issue to International Commission for the Conservation of Atlantic Tunas (ICCAT) Working Group on IUU Fishing in May 2002.	FAO Country Review
6b.	If so, in what way.		
7a.	Is policy attempting to introduce user rights to fishers?	Law seeks to use a property rights and quasi-exclusive ownership approach to manage the principal ocean uses and ocean resources in China’s territorial sea. The Law sets out a framework for classifying uses of ocean space and granting licences to use ocean space according to the functions classified. Article 10 of 1986 Law also states that “In conformity with the overall arrangement made by the state for utilization of water areas, people’s governments at and above the county level may assign state-owned water surfaces and tidal flats that have been designated for aquaculture to units under ownership by the whole people and units under collective ownership to develop aquaculture, and after examining their qualifications grant those units aquaculture licences to confirm their rights to the use of such water surfaces and tidal flats.... Ownership and rights to the use of water surfaces and tidal flats shall be protected by law and shall not be subject to encroachment by any units or individuals”. The 2001 Law reinforces this by stating in that Article 6 “The State establishes a registration system for the right to the use of sea areas. Such right shall, once registered in accordance with law, be protected by law.” Numerous other articles then provide detail on the mechanisms for this.	Administration Law on the Use of Ocean Space of the People’s Republic of China, effective as of January 1, 2002 Law of 1986 Law of 2001
7b.	If so, how and in what way.		
8.	Does policy refer to need for integration/coordination with other sectoral policies?	White Paper makes extensive reference to non-fishing use of seas.	White Paper
9.	Does policy mention ecosystems management?	Yes. Article 26 of 1986 Law states that “In accordance with the Marine Environmental Protection Law and the Water Pollution Prevention Law, people’s governments at all levels shall take	White Paper
9b.	If so, what measures are suggested.		

Policy Issue/Question		Answer	Supporting Reference
		measures to protect and improve the ecosystem of fishery waters, prevent pollution...".	
10.	Does policy include the use of MPAs?	Yes. White Paper refers to marine sanctuaries. Marine nature reserves are composed of core, buffer and experimental zones, in order to facilitate multiple uses and protect sensitive resources. At present, over 69 marine protected areas in PR China (including bays, islands, estuaries, coasts, coral reefs, mangrove swamps, coastal lagoons, marine natural history sites, seaweed beds and wetlands) have been developed, covering an area of 12674 km ² . The SC, concerned national agencies, and the subnational governments may designate natural reserves and take protective measures.	White Paper PEMSEA, 2003
11a.	Does policy include specific measures related to conflict management?	Yes. 1986 Law Article 12 states that "Disputes over the ownership and rights to the use of water surfaces or tidal flats that arise between units under ownership by the whole people, between units under collective ownership or between units under ownership by the whole people and units under collective ownership shall be solved through consultation between the parties concerned. If no agreement is reached through consultation, the disputes shall be handled by a people's government at or above the county level. If a party refuses to accept the decision of the people's government, it may file a suit in a people's court within 30 days after receiving notification of the decision. Before the disputes over ownership and rights to the use of certain water surfaces or tidal flats are solved, no party may disrupt fishery production in the disputed areas". And 2001 law provides for functional zoning.	1986 Law
11b.	If so, what are they.		2001 Law
Section C: Financial/economic and marketing issues			
1a.	Does policy provide for the provision of subsidies?	Yes for vessel scrapping and job redeployment... good subsidies.	
1b.	What are the main form of "good" subsidies provided?		
1c.	If so, what are the main forms of "bad" subsidy provided and what is their time frame. (pls use your own judgment to decide whether subsidies (e.g. training, social support, boat building, fuel, etc.) are good or bad)		
2.	Is there an overall thrust/trend towards reducing or increasing the level of subsidy provided?	–	
3.	Does policy include increasing attempts to introduce user payments e.g. charges imposed on the fishing industry?	A user fee scheme has been developed and implemented according to the assessments of ecosystems and socio-economic values of the sea areas, thus contributing to the sustainable use of the resources.	PEMSEA, 2003

	Policy Issue/Question	Answer	Supporting Reference
		Article 19 of 1986 law states that “Departments of Fishery Administration under the people’s governments at and above the county level shall work out overall plans and take measures to increase fishery resources in the fishery waters under their jurisdiction. These departments may collect fees from the units and individuals profited by the use of such waters and devote the money thus collected to the increase and protection of fishery resources. The procedures for collecting such fees shall be formulated by the department of fishery administration and the department of finance under the State Council, and must be approved by the State Council before going into effect”.	Law of 1986
4.	Does fisheries policy include mention of the need to support the traceability and/or certification of products?	<p>Starting end of 2002, the Chinese Ministry of Agriculture has implemented a programme called “Non Human Hazard Agriculture production”. The aim of this programme is to guide the farmers including fish farmers to farm their products according to required procedures and standards, and those products qualified will be labeled with the seal “Non human hazard agricultural products”. The programme is currently implemented on a voluntary basis.</p> <p>Aquaculture Regulation on Quality and Safety Management (2002) aims to encourage fish farmers to adopt good practices for fish farming and to provide quality and safety products for human consumption. The regulation set stringent aquaculture measures to substantially improve the safety and quality of China’s farmed aquatic products. It takes a hard look at every aspect of fish farming from the quality of water and aquatic seeds to feeds, technology, fish drugs and marketing. It stipulates that fish farmers must use pollution-free water in line with the Water Standards for Aquaculture. This, along with an emphasis on the use of disease-free aquatic seeds, is aimed at preventing outbreak of diseases. The regulations stipulate that fish farms must have permits, keep daily logs on aquaculture production and drug use, and have their products examined and labeled before selling them.</p>	Shuping, 2005
5a. 5b.	Does policy refer to increasing value-added? If so, how is this to be achieved.	Yes “restructuring fisheries to improve quality and increase income (not production) = value addition.	10 th 5-yr plan
6.	Does policy refer to tariff barriers and/or free trade areas in the region?	No. But note that until accession to WTO, Beijing historically protected its domestic shrimp sector by imposing a tariff totaling 52.1 percent (comprising a 30-percent tariff plus 17 percent VAT) on all shrimp imports.	
7.	Does policy seek to increase exports?	?	

Policy Issue/Question		Answer	Supporting Reference
8a.	Are there any specific policy initiatives to improve the efficiency of fisheries administrations? e.g. public/private partnerships	Yes. The National Economic and Social Development Programme for 2001-2005, adopted by the NPC, gives priority to the following activity which is closely associated with the COMAR area (People's Daily, 2001): Restructuring of ownership and corporate systems, including those of the ocean industries for improved economic efficiency.	PEMSEA, 2003
8b.	If so, pls elaborate.		
Section D: Socio-economic and poverty issues			
1a.	Does policy refer to issues of poverty?	?	
1b.	If so, in what capacity e.g. references to PRSPs, non-fisheries sector poverty reduction strategies, etc.		
2.	Does policy include mention of, or provide for, micro-finance?	No.	
3.	Does policy include reducing the number of those engaged in fishing maintaining current numbers, or increasing/maximizing employment?	Reducing. China started a 5-year buy back program in 2002. According to the program, China would reduce 30000 fishing vessels and arrange 300000 fishermen transmit to other jobs within the 5 years. The central government will input 33 million US dollars each year and local government will input about 1 to 1 counterpart fund in supporting the program.	FAO Country Review
4.	Does policy include assistance to fishers to leave the fisheries sector or to supplement livelihoods from non-fishing activities?	Yes see above.	
5a.	Does policy refer to food security?	Yes.	Pers. Comm. Jin
5b.	If so, to what extent (if at all) is policy specific about whether fisheries should provide direct food security (i.e. fish being consumed domestically) or indirect food security (fish exported with money then available for food imports).		
Section E: Overall impression of policy trends			
<p>In summary, what are the main <i>trends and changes</i> in fisheries policy over the past 10 years. Please also consider in the response to this question that the seriousness with which a certain policy is pursued can often be measured by the share of the budget allocated to it, or by whether it finds expression in specific legislation or regulations.</p> <p>Key changes include introduction of use rights of sea areas.</p>			

India

Policy Issue/Question		Answer	Supporting Reference
Section A: Policy Targets/Indicators			
1a.	Does policy contain specific development <i>targets</i> for capture fisheries?	See 5 below.	FAO Country Review
1b.	If so, pls elaborate.		
2a.	Does policy contain specific management <i>targets</i> for capture fisheries? e.g. area under MPAs, etc.	Not at national level.	
2b.	If so, pls elaborate.		
3a.	Does policy contain specific development <i>targets</i> for aquaculture?	See 5 below.	FAO Country Review
3b.	If so, pls elaborate.		
4a.	Does policy contain specific management <i>targets</i> for aquaculture?	Not at national level.	
4b.	If so, pls elaborate.		
5a.	Does policy contain any other specific <i>targets</i> or <i>indicators</i> e.g. value of exports?	Yes. The primary national goal for fisheries is to increase per capita availability of fish from the current level of around 5 kg/year to around 11 kg/year.	FAO Country Review
5b.	If so, what are they. (List all)		
6.	Is there a sense in development targets that aquaculture is more, less, or as important as capture fisheries production?	?	
Section B: Natural Resource Management			
1.	Does policy include the use of fishery co-management and/or community management?	<p>Yes. Co-management and/or community management are referred to in the national Comprehensive Marine Fishing Policy of 2004, in so far as “Fish aggregating devices would be promoted as a community-based activity”, and “Ornamental fish breeding and coastal cage aquaculture would be developed with a community orientation”.</p> <p>Government encourages the formation of associations in all sectors (aquaculture, inland fisheries, mariculture, coastal fishing, offshore fishing, etc.) in order to put in place an enabling framework to engage in discussions with stakeholders, to receive realistic reports of field activities, constructive recommendations for strategy and policy formulation, and to receive feedback on government proposals. And there are extensive and numerous community management regimes in place in India.</p>	<p>Marine Fishing Policy</p> <p>FAO Country Review</p>
2.	Does fisheries policy (as opposed to national non-sectoral policy) specifically provide for decentralization/devolution of management powers and responsibilities?	<p>Yes. Under the Constitution of India, fisheries within the territorial waters, which extend up to a distance of twelve nautical miles from shore, is a State subject and the primary responsibility of its development rests with the State Government.</p> <p>Items on List I (Union List) are dealt with by the Union Government, and items on List II are dealt with by State Governments. List III contains a list of items which fall under the shared responsibility of both the Union Government and the States (Concurrent List).</p>	<p>Soumya et al.</p> <p>FAO Country Review</p>

Policy Issue/Question		Answer	Supporting Reference
		There are no legal provisions in place below State level to legislate for fisheries management at the local level.	
3a.	Does policy include attempts to expand national offshore fisheries e.g. through the use of larger vessels?	Yes. India has never signed a fisheries access agreement with a distant water fishing nation (DWFN), and has persisted for decades in its attempts (e.g. 1981 Charter Policy, joint ventures) to develop its own offshore industrial fisheries by nationally-owned interests. Despite proceeding with national development of its offshore fisheries, India's inshore fisheries have always been the most important sub-sector, both in terms of catch and numbers of people depending on the fisheries. "As the bulk of incremental catch to augment annual marine fish production has to come from deep-sea sector and beyond EEZ limit, the Government would encourage introduction of more resource specific vessels of above 20 m length".	FAO Country Review
3b.	If so, is such expansion at the expense of any foreign fishing interests currently operating in the country.		Marine Fishing Policy
4.	Does policy encourage the movement of small-scale fisheries into offshore areas, due to resource constraints and technical improvements/efficiencies?	Policy advocates technology transfer to small-scale sector and "The small-mechanized sector would be encouraged by providing incentives for acquisition of multi-day fishing units".	Marine Fishing Policy
5a.	Does policy specifically recognize and address any issues of over capacity?	Yes. Policy states that "Assessment of existing fishing capacity and plans for regulating or developing one or the other sectors of EEZ would be taken up". A range of capacity reduction measures are used in different fisheries e.g. shrimp, and sardines, on East coast. A Government sub-group has been constituted to assess fishing capacity, and the Government intends to have capacity measured by 2005. In addition to this, the new deep-sea policy is mentioned in the capacity study, and is expected to address these issues.	Marine Fishing Policy
5b.	If so, what and how.		FAO Questionnaire FAO Country Review
6a.	Does policy refer to and/or deal with IUU fishing?	The extent of IUU fishing and related problems is also being assessed by a sub-group.	FAO Country Review
6b.	If so, in what way.		
7a.	Is policy attempting to introduce user rights to fishers?	Coastal Fishing Policy is defined by an open access regime, which has given rise to a sector with many entrants exploiting coastal marine resources to, and beyond, their full potential. Community use rights are afforded to certain castes of fishers, and non-fisheries specific legislation can also make provision community use rights. However, principal fisheries legislation is not thought to provide for community use rights. But recent public notice following 2004 Fischeires Policy provides detail on the optimum number of deep-sea fishing vessels of each category to be operated in EEZ in next five years, numbers of	FAO Country Review
7b.	If so, how and in what way.		No. 21001/17/2004-FY (Ind)

Policy Issue/Question		Answer	Supporting Reference
		Letters of Permission (LOPs) surrendered and numbers of LOPs which may be issued.	
8.	Does policy refer to need for integration/ coordination with other sectoral policies?	Yes. “close liaison need to be maintained with Central and State Pollution Control Board for considering suitable legislation for all industrial establishments discharging effluents in to the sea”.	Marine Fishing Policy
9a.	Does policy mention ecosystems management?	Yes. Policy states that fisherman as the main stakeholder of the marine environment has to be sensitized against the land based pollution besides educating him in responsible fishing practices, which would cause the least disturbance to the marine ecosystem including mangroves.	Marine Fishing Policy
9b.	If so, what measures are suggested.		
10.	Does policy include the use of MPAs?	Yes. The concept of no-fishing zones in open waters is gaining importance in several regions of the west coast of India (Vivekanandan, 2002). And fish sanctuaries and MPAs are part of formal policy.	FAO Country Review Policy Questionnaire, 2005
11a.	Does policy include specific measures related to conflict management?	Yes especially at State level where State Marine Fishing Regulation Acts and regulations are primarily put in place to deal with conflicts. E.g. The Tamil Nadu Marine Fisheries Act, 1983, was formulated to regulate fishing activities, protect interest of different sections, conserve fish and resolve law and order at sea. Kerala passed the Marine Fishing Regulation Act in 1980 based on the recommendations of the Majumdar Committee and banned trawlers during monsoon period June-August in 1981. There are also dispute resolution mechanisms and use of seasonal trawl bans and zonation to reduce conflicts.	Soumya et al.
11b.	If so, what are they.		FAO Questionnaire
Section C: Financial/economic and marketing issues			
1a.	Does policy provide for the provision of subsidies?	Modernization of the fleet and upgrading of infrastructure receives attention through subsidies, although amounts are modest, and one-time payments. Fishermen cooperative societies are exempted from income tax. “The small-mechanized sector would be encouraged by providing incentives for acquisition of multi-day fishing units”. “Vessels, which are landing quality fish for export would be provided with suitable incentive as in other export oriented agri-ventures”. “Special incentives would be provided for wholly Indian owned vessels for venturing into international waters and for concluding fishing arrangements with other nations under license”.	FAO Questionnaire
1b.	What are the main form of “good” subsidies provided?		FAO Country Review Marine Fishing Policy
1c.	If so, what are the main forms of “bad” subsidy provided and what is their time frame. (pls use your own judgment to decide whether subsidies (e.g. training, social support, boat building, fuel, etc.) are good or bad)		

Policy Issue/Question		Answer	Supporting Reference
2.	Is there an overall thrust/trend towards reducing or increasing the level of subsidy provided?	Reduced through targeted subsidies, and rationalization. Policy states that “Uniformity in welfare schemes that are being implemented in different regions would be ensured. Schemes operated parallelly by States and Centre would be rationalized”, and that “Greater participation of cooperatives, NGOs and local self-governance would be sought in implementation of welfare schemes for fishermen, thereby reducing the direct role of Central and State Governments in the process”.	Marine Fishing Policy
3.	Does policy include increasing attempts to introduce user payments e.g. charges imposed on the fishing industry?	Only through licence fees. Participation by operators in the fisheries to cost-sharing for fisheries management is minimal. License fees are levied in the mechanized sector, but fees are low, as are penalties applied for fisheries offences. These sources of revenue do not represent a serious contribution to the overall cost Government faces for the management of the resource.	FAO Country Review
4.	Does fisheries policy include mention of the need to support the traceability and/or certification of products?	Yes. In addition to requiring improvements in quality regimes, policy states that “Packaging and bar coding would be made mandatory for authorized sale of fish and fish products through registered outlets for ensuring food safety”.	Marine Fishing Policy
5a. 5b.	Does policy refer to increasing value-added? If so, how is this to be achieved.	Indirectly by stating that “Total utilization of harvested fish for food and non-food uses would be the central theme”. Creation of MPEDA also intended to increase value-added and exports.	Marine Fishing Policy
6.	Does policy refer to tariff barriers and/or free trade areas in the region?	No.	
7.	Does policy seek to increase exports?	Yes, the first of three key policy goals is “to augment marine fish production of the country up to the sustainable level in a responsible manner so as to boost export of seafood from the country and also to increase per capita fish protein intake of the masses”. The Marine Products Export Development Authority, a nodal agency was set up by the Govt. of India in 1972 for the promotion of seafood exports from India. Establishment of liaison offices of the Marine Products Export Development Agency in target markets.	Marine Fishing Policy
8a. 8b.	Are there any specific policy initiatives to improve the efficiency of fisheries administrations? e.g. public/private partnerships If so, pls elaborate.	No.	

Policy Issue/Question		Answer	Supporting Reference
Section D: Socio-economic and poverty issues			
1a.	Does policy refer to issues of poverty?	No specific mention of poverty in Marine Fisheries Policy, but a special section on Fishermen's Welfare.	Marine Fishing Policy
1b.	If so, in what capacity e.g. references to PRSPs, non-fisheries sector poverty reduction strategies, etc.		
2.	Does policy include mention of, or provide for, micro-finance?	No, but provision of micro-finance is notable in India through a wide variety of mechanisms e.g. South Indian Federation of Fishermen Societies and the National Bank for Agriculture and Rural Development (NABARD) in India which runs what is probably the largest micro-finance programme in the world.	
3.	Does policy include reducing the number of those engaged in fishing maintaining current numbers, or increasing/maximizing employment?	No.	
4.	Does policy include assistance to fishers to leave the fisheries sector or to supplement livelihoods from non-fishing activities?	No.	
5a.	Does policy refer to food security?	Yes. The primary national goal for fisheries is to increase per capita availability of fish from the current level of around 5 kg/year to around 11 kg/year. And the opening words of the foreword to the Comprehensive Marine Fishing Policy are: "Relevance of the Marine Fisheries Sector extends beyond the livelihood security of the large coastal population to the food security of our countrymen and our foreign exchange generation". b. Not specific.	FAO Country Review Marine Fishing Policy
5b.	If so, to what extent (if at all) is policy specific about whether fisheries should provide direct food security (i.e. fish being consumed domestically) or indirect food security (fish exported with money then available for food imports).		
Section E: Overall impression of policy trends			
<p>In summary, what are the main <i>trends and changes</i> in fisheries policy over the past 10 years. Please also consider in the response to this question that the seriousness with which a certain policy is pursued can often be measured by the share of the budget allocated to it, or by whether it finds expression in specific legislation or regulations.</p> <p>Increasing emphasis on resource sustainability whereas previously policy was focused more on conflict management.</p>			

Indonesia

Policy Issue/Question		Answer	Supporting Reference
Section A: Policy Targets/Indicators			
1a.	Does policy contain specific development <i>targets</i> for capture fisheries?	Yes, 4.97 million tonnes to 5.44 million tonnes by 2009.	2005-2009 Strategy
1b.	If so, pls elaborate.		
2a.	Does policy contain specific management <i>targets</i> for capture fisheries? e.g. area under MPAs, etc.	No.	
2b.	If so, pls elaborate.		
3a.	Does policy contain specific development <i>targets</i> for aquaculture?	Yes. Production of 5 million tonnes by 2009. Revitalizing aquaculture plan has specific area and production targets for 10 key species.	Policies on Aquaculture Development, Revitalisasi PB 2006-2009
3b.	If so, pls elaborate.	2.25 in 2005 to 4.27 in Strategy.	
4a.	Does policy contain specific management <i>targets</i> for aquaculture?	No.	
4b.	If so, pls elaborate.		
5a.	Does policy contain any other specific <i>targets</i> or <i>indicators</i> e.g. value of exports?	By 2009:	2005-2009 Strategy
5b.	If so, what are they. (List all)	<ul style="list-style-type: none"> • Increasing average-income of groups which are the target of the program becomes 1.5 million rupiah/month; • Increasing knowledge and skill of 75000 people within 5 years and 7500 apparatus; • Contribution to the gross domestic product at 5.1 percent; • Total Fisheries production at 9.7 million tonne; • Export value of fisheries products at 5 billion USD; • Fish consumption at 32.29 kg/capita/year; • Providing cumulative employment opportunities at 10.2 million people: <ul style="list-style-type: none"> a. Capture Fisheries: 3.7 million people; b. Aquaculture: 6.5 million people; • Scope of poverty alleviation program at 18 percent of coastal community population (21 million people). 	
6.	Is there a sense in development targets that aquaculture is more, less, or as important as capture fisheries production?	More given potential of sector to grow.	
Section B: Natural Resource Management			
1.	Does policy include the use of fishery co-management and/or community management?	Yes. In the Fisheries Act No. 31 of 2004, reference is made to community participation. The Act promotes community participation in fisheries management and provides for the taking into account of <i>adat</i> law (customary law and tradition). It establishes new institutions such as the Council for the Assessment of National Fisheries Development, led by the President, which consists of representatives of the private sector in addition to relevant Ministers. Furthermore, it provides for the empowerment of small-scale fishermen and fish farmers through access to credit, education and	Macfadyen et al., 2005. 2005-2009 Strategy

Policy Issue/Question	Answer	Supporting Reference
	<p>training, and development of small-scale fishermen and fish farmers groups and fisheries cooperatives. It also makes provision for the delegation of “fisheries functions” from the central Government to regional Governments, and for community participation in law enforcement through reporting of violations of fisheries laws and regulations by local communities.</p> <p>Strategy also states that “Established community participation in marine and fisheries resource management through efforts of (1) establishing the autonomous surveillance institutions, (2) provisioning surveillance facilities and infrastructure and personnel, (3) developing surveillance technology, (4) increasing community participation and roles in surveillance implementation, (5) law compliance and enforcement”.</p>	
<p>2. Does fisheries policy (as opposed to national non-sectoral policy) specifically provide for decentralization/devolution of management powers and responsibilities?</p>	<p>Yes. 1999 Autonomy Act devolves power to district level especially, rather than Provincial. But more in terms of implementation. E.g., licence issue: >30 gt central govt., 10-30 gt provincial, <10 gt district. Districts should follow national policy, but sometimes national policy not applicable in different locations, and district levels lack capacity to plan and formulate policies.</p> <p>Under the Act, budgets now go straight to the district level e.g. more than 10 percent of Ministry of Marine Affairs and Fisheries budget, and the deconcentrated budget for marine and fisheries development and management has significantly increased in recent years. Eighty percent of licence/fee revenue at province and district level can also be retained.</p>	<p>Policy Questionnaire</p>
<p>3a. Does policy include attempts to expand national offshore fisheries e.g. through the use of larger vessels?</p> <p>3b. If so, is such expansion at the expense of any foreign fishing interests currently operating in the country.</p>	<p>No.</p>	<p>Law and Strategy</p>
<p>4. Does policy encourage the movement of small-scale fisheries into offshore areas, due to resource constraints and technical improvements/efficiencies?</p>	<p>No.</p>	<p>Law and Strategy</p>
<p>5a. Does policy specifically recognize and address any issues of over capacity?</p> <p>5b. If so, what and how.</p>	<p>Said to be measuring capacity and capacity reduction programmes being used following NPOA preparation in 2003.</p>	<p>FAO Country Review and Quesitonnaire</p>
<p>6a. Does policy refer to and/or deal with IUU fishing?</p> <p>6b. If so, in what way.</p>	<p>Reported to be preparations for a National Plan of Action for IUU Fishing, and that Indonesia is introducing VMS, MCS, and strengthening its licensing, law enforcement and inter-agency enforcement capacity to address IUU fishing.</p> <p>Also strategy for 2005-2009 refers to illegal fishing as a “major problem”.</p>	<p>FAO Country Review</p> <p>Strategy for 2005-2009</p>

Policy Issue/Question		Answer	Supporting Reference
7a.	Is policy attempting to introduce user rights to fishers?	Legislation does not provide for community use rights, but village tenure over a defined area of both land and sea is strongly entrenched in the culture and recognized as legitimate by fishers even though it is not formally supported by law.	Macfadyen et al., 2005
7b.	If so, how and in what way.		
8.	Does policy refer to need for integration/coordination with other sectoral policies?	National coordinating committee prepares policy.	Policy Questionnaire
9a.	Does policy mention ecosystems management?	Yes, to the extent that the fisheries sector policy statement in the National Development Plan (REPELITA VII for 2000-2005 supported by ADB) includes efficient and sustainable management of maritime resources and the rehabilitation of damaged coastal and marine ecosystems, through improved spatial planning. And strategy says "Increasing rehabilitation and conservation of marine and fisheries resources as well as its ecosystem".	FAO TP 488
9b.	If so, what measures are suggested.		2005-2009
10.	Does policy include the use of MPAs?	Yes. Already 5 million ha of MPAs specified centrally. Under 1999 Auto Act, under 4 miles from coast is responsibility of the district, 4-12 is Provincial. Districts are now declaring their own MPAs, and already have community-based management areas, and traditional/indigenous MPAs.	Policy Questionnaire
11a.	Does policy include specific measures related to conflict management?	Yes, through conflict resolution mechanisms, and seasonal and area trawl bans. Efforts in the Ministry are concentrated on minimizing conflicts.	FAO Questionnaire
11b.	If so, what are they.		FAO TP 488
Section C: Financial/economic and marketing issues			
1a.	Does policy provide for the provision of subsidies?	No.	Law and Strategy
1b.	What are the main form of "good" subsidies provided?		
1c.	If so, what are the main forms of "bad" subsidy provided and what is their time frame. (pls use your own judgment to decide whether subsidies (e.g. training, social support, boat building, fuel, etc.) are good or bad)		
2.	Is there an overall thrust/trend towards reducing or increasing the level of subsidy provided?	–	
3.	Does policy include increasing attempts to introduce user payments e.g. charges imposed on the fishing industry?	Very little except for licence fees, but some resource recent collection in industrial fisheries. But law does allow for it by stating that "All person who derives direct benefit from the fisheries resources and its environment within the fisheries management areas of the Republic of Indonesia shall be subjected to payment of fees".	FAO Country Review 2004 Law
4.	Does fisheries policy include mention of the need to support the traceability and/or certification of products?	?	

Policy Issue/Question		Answer	Supporting Reference
5a. 5b.	Does policy refer to increasing value-added? If so, how is this to be achieved.	Yes. Fisheries management shall be carried out “to increase the productivity, quality, added value, and competitiveness”.	2004 Law
6.	Does policy refer to tariff barriers and/or free trade areas in the region?	?	
7.	Does policy seek to increase exports?	Yes. One of objectives of IMBUDKAN aquaculture programme is “to support increment of export oriented aquaculture production to increase export-earning and national food security”. And one objective of policy/legislation is to increase foreign exchange earnings.	Policies on Aquaculture Development FAO Questionnaire
8a. 8b.	Are there any specific policy initiatives to improve the efficiency of fisheries administrations? e.g. public/private partnerships If so, pls elaborate.	?	
Section D: Socio-economic and poverty issues			
1a. 1b.	Does policy refer to issues of poverty? If so, in what capacity e.g. references to PRSPs, non-fisheries sector poverty reduction strategies, etc.	Yes. Strategy says that “In this relation, the Ministry of Marine Affairs and Fisheries needs to formulate a proper development strategy appropriate with three pillars of national development strategies, namely, pro-poor, pro-job, and pro-growth”.	2005-2009 Strategy
2.	Does policy include mention of, or provide for, micro-finance?	No.	Law and Strategy
3.	Does policy include reducing the number of those engaged in fishing maintaining current numbers, or increasing/maximizing employment?	Maximizing employment, especially through aquaculture. One objective of policy/legislation is employment opportunities.	FAO Questionnaire and FAO TP 488 and 2005-2009 Strategy
4.	Does policy include assistance to fishers to leave the fisheries sector or to supplement livelihoods from non-fishing activities?	No.	Law and Strategy
5a. 5b.	Does policy refer to food security? If so, to what extent (if at all) is policy specific about whether fisheries should provide direct food security (i.e. fish being consumed domestically) or indirect food security (fish exported with money then available for food imports).	Yes, two objectives of rural aquaculture programme are “to optimize backyard productivities in order to fulfill family nutrition and to increase family income through aquaculture of consumable fish, local fish and ornamental fish”, and “to increase economic development and food security in rural areas”. And one objective of policy/legislation is supply of fish protein and fish consumption.	Policies on Aquaculture Development FAO Questionnaire and FAO TP 488
Section E: Overall impression of policy trends			
In summary, what are the main <i>trends and changes</i> in fisheries policy over the past 10 years. Please also consider in the response to this question that the seriousness with which a certain policy is pursued can often be measured by the share of the budget allocated to it, or by whether it finds expression in specific legislation or regulations.			

Japan

Policy Issue/Question		Answer	Supporting Reference
Section A: Policy Targets/Indicators			
1a.	Does policy contain specific development <i>targets</i> for capture fisheries?	Not for capture fisheries only. For total production, see A4.	–
1b.	If so, pls elaborate.		
2a.	Does policy contain specific management <i>targets</i> for capture fisheries? e.g. area under MPAs, etc.	Yes, TAC for 7 species (saury, Alaska pollack, sardine, jack mackerel, mackerel, common squid and snow crab), and Fishery Recovery Plan for overexploited species, in order to achieve sustainable fisheries and stable supply to national citizens.	The Law regarding Preservation and Management of Living Marine Resources and the Basic Law on Fisheries Policy
2b.	If so, pls elaborate.	Implementation of 51 FRPs with 76 species (including those under consideration). Target size of seagrass beds and/or tidelands to be created from 2002-2007 is 5000 ha (half size of area lost between 1978 and 1991).	
3a.	Does policy contain specific development <i>targets</i> for aquaculture?	Not for aquaculture only. See A4.	–
3b.	If so, pls elaborate.		
4a.	Does policy contain specific management <i>targets</i> for aquaculture?	Targets no, measures yes – prevention of self-induced environmental deterioration around fish farms, in order to achieve sustainable aquaculture and high-quality of cultured products.	The Law to Ensure Sustainable Aquaculture Production
4b.	If so, pls elaborate.		
5a.	Does policy contain any other specific <i>targets</i> or <i>indicators</i> e.g. value of exports?	<ul style="list-style-type: none"> • Targets for 2012. • Self-sufficiency rate target 65 percent for fish and shellfish products for food. • Self-sufficiency rate target 70 percent for seaweed products. • Volume of fish and shellfish supply for domestic consumption 10.37 million tonnes, and 8.06 million tonnes for human consumption. • Domestic fish and shellfish production 6.82 million tonnes overall with 5.26 million for human consumption. • Seaweed for domestic consumption 0.96 million tonnes. • Seaweed for domestic production 0.67 million tonnes. 	The Basic Plan for Fisheries Policy (which is based on the Basic Law on Fisheries Policy)
5b.	If so, what are they. (List all)		Endo
6.	Is there a sense in development targets that aquaculture is more, less, or as important as capture fisheries production?	As important as capture fisheries.	
Section B: Natural Resource Management			
1.	Does policy include the use of fishery co-management and/or community management?	Yes, in order to achieve the holistic utilization of sea areas. Fisheries law for many decades has recognized co/community-management. “Meiji Fishery Law” was first established in 1901, and then revised in 1949 (Shouwa Law). The Japanese fishery management regime utilizes fishery cooperatives, called Fisheries Cooperative Associations (FCAs),	The Fisheries Law, Fisheries Cooperative Association Law Macfadyen et al., 2005

	Policy Issue/Question	Answer	Supporting Reference
		<p>which are juridical persons and are granted territorial user rights (called fishing rights) established by law for capture fisheries within coastal waters of its jurisdiction. In 1948 the Fisheries Cooperative Association Law (Law No. 242, 1948) established the legal foundation of FCAs. By law, fishing rights are granted mainly to FCAs, and the FCA members are entitled to fish within that territory.</p> <p>The Marine Fisheries Resource Development Promotion Law of 1971 was amended in 1990, establishing the Resource Management Agreement System, and is also of relevance. This system encourages autonomous agreements among fishermen for the purpose of conducting resource management under more intensive and yet stricter rules than had previously been the case under prefectural fishery coordinating regulations, FCA regulations and Fishery Management Organization rules.</p>	
2.	Does fisheries policy (as opposed to national non-sectoral policy) specifically provide for decentralization/devolution of management powers and responsibilities?	<p>Decentralization is legislated to devolve decision-making power to local areas and authorities/governments in the Constitution, and in the Local Autonomy Law 1947, which is the core legislation for dealing with local government organization and management supported by other laws. The Local Autonomy Law was amended by the Law Concerning the Provision of Related Laws for the Promotion of Decentralization of Power (Omnibus Decentralization Act).</p> <p>Decentralization is also provided for under the Fisheries Law, with coordinating organizations from the national to the local level: Fishery Policy Council; Wide Area Fisheries Coordinating Committees; Local Fisheries Coordinating Committees; Local Fisheries Cooperative Associations; and more specialized FMOs. Coordination of fisheries' issues, such as rights/license distribution and local regulations, is achieved through these multilevel coordinating organizations.</p>	The Fisheries Law, Fisheries Cooperative Association Law Macfadyen et al., 2005
3a.	Does policy include attempts to expand national offshore fisheries e.g. through the use of larger vessels?	No.	Mitsutaku and Uchida Pers. Comm.
3b.	If so, is such expansion at the expense of any foreign fishing interests currently operating in the country.		
4.	Does policy encourage the movement of small-scale fisheries into offshore areas, due to resource constraints and technical improvements/efficiencies?	No.	Mitsutaku and Uchida Pers. Comm.

Policy Issue/Question		Answer	Supporting Reference
5a. 5b.	Does policy specifically recognize and address any issues of over capacity? If so, what and how.	<p>There is budget for fleet reduction. Restructuring of the fishing industry is carried out through vessel reductions and downsizing of fishing vessels in order to adjust fishing effort in proportion to the status of stocks and to secure proper financial conditions for fishers. In accordance with the “International Plan of Action for the Management of Fishing Capacity” adopted by the Fisheries Committee of the FAO in February 1999, Japan scrapped 132 tuna longline fishing vessels corresponding to about 20 percent of the vessels in this fleet segment (the financial transfer was expended in fiscal year 1998).</p> <p>Additionally, it should be noted that, as to some fisheries permitted by the Minister (Designated Fisheries), for type of fishery, the upper limit of number of vessels shall be published according to Fisheries Law on the simultaneous renewal of permission and that the number of permission tends to be decreased.</p>	<p>OECD, 2002</p> <p>Yamauti Pers. Comm., 2006</p>
6a. 6b.	Does policy refer to and/or deal with IUU fishing? If so, in what way.	<p>Yes. To prevent, deter and eliminate IUU fishing and uncontrolled importation of their catch, the “Law of Special Measures for Strengthening Conservation and Management of Tuna Resources” was established in 1996 and has been controlling trade of tunas caught by IUU and reflagged fishing vessels. Furthermore, the Organization for the Promotion of Responsible Tuna Fisheries (OPRT) was established in 2000 as an initiative taken by the tuna industries to combat IUU fishing.</p> <p>Also:</p> <ul style="list-style-type: none"> • Only Japanese vessels may fly the flag of Japan. • There are also trade measures to address IUU issues e.g. any person, who intends to import bluefin tuna, southern bluefin tuna, big-eye tuna, sword fish, patagonian-toothfish or Antarctic toothfish, shall submit required statistical documents or catch documents in accordance with the rules set by the relevant international fisheries organizations. • Positive list scheme which was adopted by each RFMO and implemented by its members including Japan. • Transshipment regulations require permits and notification. <p>As a private sector initiative, the OPRT (Organization for Promotion of Responsible Tuna Fisheries) has been established in Japan with a view to promote responsible tuna fishery. The members of the OPRT includes large-scale tuna long-line fishery organizations from China, Chinese Taipei, Indonesia, Japan, Republic of</p>	<p>FAO Summary Brief, 2006</p> <p>OECD, 2003</p>

Policy Issue/Question	Answer	Supporting Reference
	<p>Korea, and the Philippines, as well as Japanese importer, distributor, consumer organizations. Activity of the OPRT includes (i) to disseminate information related to the IUU problems in tuna fishery, (ii) to calculate the landing statistics of tuna by vessel by vessel using the data obtained from Japanese import documentation materials and to report back such figures to the vessels' flag states for their cross-checking of reported catch data, and (iii) to implement scrapping of IUU vessels.</p>	
<p>7a. Is policy attempting to introduce user rights to fishers? 7b. If so, how and in what way.</p>	<p>Already implemented. Yes, according to the Fisheries Law (1949) fisheries rights in the sea area under the jurisdiction of a Fisheries Cooperative Association (FCA) are the bona fide personal property of the individual members of that association, to whom they are distributed by the association. Each FCA, who is licensed by a local governor based on its fishing ground utilization plans, establishes regulations for the control and operation of various types of fishery in an equitable, efficient and sustained manner, as local conditions dictate. Sea tenure in Japanese coastal waters operates at various levels, ranging from the national government, through the prefecture and the local FCA, to the fishing squad and finally to the individual fisherman.</p> <p>Basically 3 main types of rights.</p> <p>The first is the Collective Fisheries Right (Kyodo-Gyogyoken). This fishery is originally based on common ownership systems of local fishing grounds. The license is issued only to fishery cooperatives, in which at least two-thirds of members are engaged in coastal fisheries for at least 90 days in the areas. Members of the cooperative use the license on an individual basis. This type of fishery occurs in almost all areas throughout the Japanese coast.</p> <p>The second type of fishery rights is the Demarcated Fishery Right (Kukaku-Gyogyoken). This is the right to engage in aquaculture. The main types of these fisheries are hanging culture, cage culture, seabed sowing cultivation in semi-inland sea areas.</p> <p>The last of the three fishery rights is the Set-Net Fishery Right (Teichi-Gyogyoken).</p>	<p>Fisheries Law, Souyma et al.</p> <p>OECD, 2004</p>
<p>8. Does policy refer to need for integration/ coordination with other sectoral policies?</p>	<p>Not specifically. But the Basic Plan for Fisheries Policy refer to promotion of closer connection between people involved in fishery and processing and distribution business, and promotion of blue tourism, opportunities to experience fisheries and direct marketing of fishery products. These are supposed to be examples of integration/ coordination with other sectoral policies.</p>	<p>Yamauti, 2006 Pers. Comm.</p>

Policy Issue/Question		Answer	Supporting Reference
9a.	Does policy mention ecosystems management?	Yes, multi-species Fishery Recovery Plan, and implementation of MPA (see B10).	The Basic Plan for Fisheries Policy (which is based on the Basic Law on Fisheries Policy) OECD, 2002
9b.	If so, what measures are suggested.	The "Environmental Assessment Law" was enacted in 1999 in order to ensure proper consideration of the environment in the decision-making process for development. The Government has made efforts to secure "blue and rich sea" through dredging of sludge and development of seaweed lands and tidal lands in the coastal areas which are negatively affected by polluted water drained from household and industries.	
10.	Does policy include the use of MPAs?	Yes, to protect spawning stocks, juvenile fish and enhance resources.	The Law to Conserve Fisheries Resources
11a.	Does policy include specific measures related to conflict management?	Yes, various levels and scales of coordinating organizations have been instituted.	Fisheries Law
11b.	If so, what are they.	To resolve conflicts by autonomous bases.	
Section C: Financial/economic and marketing issues			
1a.	Does policy provide for the provision of subsidies?	a: Subsidies exist, but not sure if the policy explicitly includes the provision of such.	Mitsutaku and Uchida Pers. Comm. OECD, 2002 Schmidt OECD, 2002
1b.	What are the main forms of "good" subsidies provided?	There are no market price support or direct payments subsidies, but there are soft loans available and payments for fleet reduction.	
1c.	What are the main forms of "bad" subsidy provided and what is their time frame? (pls use your own judgment to decide whether subsidies (e.g. training, social support, boat building, fuel, etc.) are good or bad)	And as noted in Schmidt, "support provided by the central government to the FCAs is of high significance. The support includes legal, technical and financial assistance and may be an additional reason for the longevity of the community-based fisheries management system in Japan. The support to the FCAs and the financial transfers to port infrastructure in Japan are the principal Government financial transfers to the fishing industry which in 2001 totaled JPY 313 billion". The unemployment insurance and pension systems for the fishing industry are basically the same as in other industries. However, fishers who lose their jobs due to restructuring receive a special allowance in addition to the standard unemployment allowance in order to promote transfers to new jobs.	
2.	Is there an overall thrust/trend towards reducing or increasing the level of subsidy provided?	There seems to be a trend to reduce subsidies, especially because of the availability of finance.	Mitsutaku and Uchida Pers. Comm. Gov. annual report 2004
3.	Does policy include increasing attempts to introduce user payments e.g. charges imposed on the fishing industry?	No/little. Generally felt that costs for management services should be covered by the government because these services bring public benefit.	OECD, 2001

Policy Issue/Question		Answer	Supporting Reference
4.	Does fisheries policy include mention of the need to support the traceability and/or certification of products?	“Japanese Agricultural Standard (JAS) Law” was revised in 1999 to require labeling of all food products. The labeling of fish and fishery products has to include descriptions of the place of origin for fresh fish and of materials used for processed fishery products.	FAO Summary Brief 2006
5a. 5b.	Does policy refer to increasing value-added? If so, how is this to be achieved.	Yes, to provide high valued-added and demand-driven products.	White Paper on Fisheries Policy on 2006
6.	Does policy refer to tariff barriers and/or free trade areas in the region?	?	
7.	Does policy seek to increase exports?	Yes.	Mitsutaku and Uchida Pers. Comm.
8a. 8b.	Are there any specific policy initiatives to improve the efficiency of fisheries administrations? e.g. public/private partnerships If so, pls elaborate.	Yes. The Basic Plan for Fisheries Policy refers to efficient administration and prioritize financial support with a view to utilize finite budget as effectively as possible.	Yamauti, Mitsutaku and Uchida Pers. Comm.
Section D: Socio-economic and poverty issues			
1a. 1b.	Does policy refer to issues of poverty? If so, in what capacity e.g. references to PRSPs, non-fisheries sector poverty reduction strategies, etc.	No. However, “during recent years, fisheries managers have begun to focus more on the social aspects and functions of fisheries. This has largely developed in response to the fact that fishing profits have been falling. In fisheries where fisheries remuneration is largely based on so-called “share basis” the effects of fewer fish have immediate income consequences for skipper and crew alike, and hence also impact the coastal communities that are dependent on fish as a source of employment and livelihood”.	Mitsutaku and Uchida Pers. Comm. Schmidt
2.	Does policy include mention of, or provide for, micro-finance?	Yes, fisheries cooperatives associations run banking.	The Fisheries Cooperative Association Law
3.	Does policy include reducing the number of those engaged in fishing maintaining current numbers, or increasing/maximizing employment?	Yes, increase the number of younger fishermen, esp. at rural areas. The number of fishermen are continuously declining.	The Basic Plan of Fisheries Policy
4.	Does policy include assistance to fishers to leave the fisheries sector or to supplement livelihoods from non-fishing activities?	Yes, see B5.	Mitsutaku and Uchida Pers. Comm. Schmidt
5a. 5b.	Does policy refer to food security? If so, to what extent (if at all) is policy specific about whether fisheries should provide direct food security (i.e. fish being consumed domestically) or indirect food security (fish exported with money then available for food imports).	Yes, see B4.	Mitsutaku and Uchida Pers. Comm. Schmidt

Policy Issue/Question	Answer	Supporting Reference
Section E: Overall impression of policy trends		
<p>In summary, what are the main <i>trends and changes</i> in fisheries policy over the past 10 years. Please also consider in the response to this question that the seriousness with which a certain policy is pursued can often be measured by the share of the budget allocated to it, or by whether it finds expression in specific legislation or regulations.</p> <p>The decline in the number of fishermen and the resource level of several species, as well as increasing import of fishery products and rising fuel prices, are the main issues in last ten years. Recently, however, the marine ecosystem management is also attracting attentions. The seriousness of a certain policy would be measured by the size of the budget in some cases, but the size of budget itself is very inflexible in many cases (number of officers, as well). So, large budgets are often allocated out of date policies. The aims of new laws, plans or amendments are more appropriate to judge the seriousness and the direction of national policy.</p> <p>National government and local fishermen are motivators of most policy changes.</p>		

Malaysia

Policy Issue/Question	Answer	Supporting Reference
Section A: Policy Targets/Indicators		
1a. Does policy contain specific development <i>targets</i> for capture fisheries? 1b. If so, pls elaborate.	a. Yes. Coastal and inland capture fisheries are depleting due to over fishing. b. To maintain existing capture production of 900000 tonnes from the coastal waters and then to increase production from deep-sea to 500000 tonnes.	Statement from DoF Malaysia Website www.dof.gov.my www.myaquatic.com/Department/objectives.htm
2a. Does policy contain specific management <i>targets</i> for capture fisheries? e.g. area under MPAs, etc. 2b. If so, pls elaborate.	?	
3a. Does policy contain specific development <i>targets</i> for aquaculture? 3b. If so, pls elaborate.	In the 3 rd Malaysia National Agriculture Policies, by year 2010, Malaysia's aquaculture development target is to produce 600 000 metric tonnes (Marine aquaculture production = 400000 mt, Freshwater aquaculture production = 200000 mt). Because of depleting capture fisheries. Targets by commodity/species: <ul style="list-style-type: none"> ● Freshwater aqua/fish = 200000 mt ● Marine shrimp = 150000 mt ● Marine fish = 120000 mt ● Marine mollusk = 130 000 mt ● Seaweed = 26 000 mt 	In 3 rd Malaysia National Agriculture Policies
4a. Does policy contain specific management <i>targets</i> for aquaculture? 4b. If so, pls elaborate.	Yes, to identify suitable sites and then establish and gazette the sites as Aquaculture Industrial Zones in all the states in Malaysia. E.g. in Sabah, a total of 63342 hectares have been identified to be gazetted as Aquaculture Industrial Zones.	In 3 rd Malaysia National Agriculture Policies
5a. Does policy contain any other specific <i>targets</i> or <i>indicators</i> e.g. value of exports? 5b. If so, what are they. (List all)	To achieve a balance of trade of RM4 billion per year through the contribution of the 10 established major products. To guarantee a minimum net income of RM3000 per month for fisheries entrepreneurs. To ensure the income of fisherman exceeds the poverty level.	Malaysian Fisheries Department Website/3 rd National Agriculture Policy

Policy Issue/Question		Answer	Supporting Reference
6.	Is there a sense in development targets that aquaculture is more, less, or as important as capture fisheries production?	Both as important: Aquaculture production target = 600000 tonnes Capture fisheries production target = 900000 tonnes. NAP3 states that “the fisheries industry, particularly deep-sea fishing and aquaculture, will be further developed on a commercial and integrated basis”.	3 rd National Agriculture Policy
Section B: Natural Resource Management			
1.	Does policy include the use of fishery co-management and/or community management?	Yes. e.g. Sabah has already successfully implemented the Sabah Tagal System: A sustainable Community-based (Co-management) riverine fisheries management. Because of the depleting riverine fisheries resource in Sabah, the Sabah Fisheries Department and the local community (especially the indigenous community) are interested and committed in the system.	It is incorporated in the Sabah Inland Fisheries & Aquaculture Enactment 2003
2.	Does fisheries policy (as opposed to national non-sectoral policy) specifically provide for decentralization/devolution of management powers and responsibilities?	Decentralization is not much underway yet, although the 14 States do have control over some inshore licensing and implementation of policy. In fact FAO TP 488 suggests that strong central control has been one of the reasons for management success.	FAO TP 488
3a. 3b.	Does policy include attempts to expand national offshore fisheries e.g. through the use of larger vessels? If so, is such expansion at the expense of any foreign fishing interests currently operating in the country.	Yes. Yes. The Department is in the process of training locals to be tekongs (skippers) of deep-sea boats so that they can replace foreign tekongs.	Pers. Comm. Wong
4.	Does policy encourage the movement of small-scale fisheries into offshore areas, due to resource constraints and technical improvements/efficiencies?	Yes. The government is encouraging the local companies to expand their coastal vessels and to go offshore/deep-sea where the resources are still under-exploited.	3 rd Malaysia National Agriculture Policy
5a. 5b.	Does policy specifically recognize and address any issues of over capacity? If so, what and how.	Yes, by having exit plan for coastal fishermen to go into aquaculture. And Management of Fishing Capacity by setting a moratorium on issuance of new licenses for the coastal areas, setting fishing zones for conservation, and limiting vessels size and fishing gears.	3 rd National Agriculture Policy FAO TP 488
6a. 6b.	Does policy refer to and/or deal with IUU fishing? If so, in what way.	Yes. They implemented a stricter zoning system to protect small, less mobile coastal fishers; set up 40 MPAs to rejuvenate stocks (1994) and enhance tourism in the sector; strengthened vessel identification requirements; implemented an inter-agency law enforcement mechanism (MECC) of national defence, customs, marine police, fisheries, and now including the new coast guard to jointly protect the EEZ; and strengthened their fisheries laws. For the prevention, deterrence and elimination of Illegal, Unreported and Unregulated Fishing (IUU),	FAO TP 488

Policy Issue/Question		Answer	Supporting Reference
		Malaysia now requires all vessels fishing in Malaysian waters to be licensed, carry the Malaysian flag and implement a strong MCS system for compliance.	
7a.	Is policy attempting to introduce user rights to fishers?	?	
7b.	If so, how and in what way.		
8.	Does policy refer to need for integration/ coordination with other sectoral policies?	?	
9a.	Does policy mention ecosystems management?	Yes. Biodiversity also mentioned.	
9b.	If so, what measures are suggested.	Not sure.	
10.	Does policy include the use of MPAs?	Yes. A series of marine parks have been established in the coastal waters. Fishing within two nautical miles of the marine parks is prohibited.	FAO TP 488
11a.	Does policy include specific measures related to conflict management?	Yes to the extent that management is based on a system of zones (0-5, 5-12, 12-30, >30) with different zones for different vessel sizes. For each zone the optimum number of fishing vessels has been determined based on estimation of maximum sustainable yield.	
11b.	If so, what are they.		
Section C: Financial/economic and marketing issues			
1a.	Does policy provide for the provision of subsidies?	Yes. Fuel, training, boat building, fishing net and engines. Social support.	ADB-RETA 5945 Project Website, WorldFish Center
1b.	What are the main forms of “good” subsidies provided?	Suitable finance policies, investment and tax incentives, and other investment incentives for certain fishery activities and products are available.	
1c.	What are the main forms of “bad” subsidy provided and what is their time frame? (pls use your own judgment to decide whether subsidies (e.g. training, social support, boat building, fuel, etc.) are good or bad)	Among these activities spawning, breeding and culturing of aquatic products, offshore fishing, harvesting and processing of aquatic products, and processing of aquaculture feeds are important.	
2.	Is there an overall thrust/trend towards reducing or increasing the level of subsidy provided?	Yes.	3 rd National Agriculture Policy
3.	Does policy include increasing attempts to introduce user payments e.g. charges imposed on the fishing industry?	Licence fees, but not sufficient to cover management costs.	FAO TP 488
4.	Does fisheries policy include mention of the need to support the traceability and/or certification of products?	Yes.	3 rd National Agriculture Policy
5a.	Does policy refer to increasing value-added?	Yes.	3 rd National Agriculture Policy
5b.	If so, how is this to be achieved.	Encouraging more downstream processing on most of the fish production.	
6.	Does policy refer to tariff barriers and/or free trade areas in the region?	Not sure.	
7.	Does policy seek to increase exports?	Yes, the overriding objective of NAP3 is the maximization of income through the optimal utilization of resources in the sector. This includes maximizing agriculture’s contribution to national income and <i>export earnings</i> as well as maximizing income of producers.	3 rd National Agriculture Policy

Policy Issue/Question		Answer	Supporting Reference
8a.	Are there any specific policy initiatives to improve the efficiency of fisheries administrations? e.g. public/private partnerships	Yes. NAP3 states that “A review and rationalization of the existing institutional arrangements will be carried out to make them more effective in supporting agricultural development and facilitating commercialization and growth of the sector. Currently, the Government plays a leading role in the sector’s development through the provision of various support services and infrastructural facilities. Notwithstanding the Government’s commitment, the private sector also contributes significantly towards the sector’s development especially in the plantation sub-sector.” And there are specific measures designed to ensure public/private collaboration.	3 rd National Agriculture Policy
8b.	If so, pls elaborate.		
Section D: Socio-economic and poverty issues			
1a.	Does policy refer to issues of poverty?	a. Yes, there are still many poor fishermen, mostly the indigenous community. b. Not sure.	3 rd National Agriculture Policy
1b.	If so, in what capacity e.g. references to PRSPs, non-fisheries sector poverty reduction strategies, etc.		
2.	Does policy include mention of, or provide for, micro-finance?	Yes, through the Agriculture Bank, other government agencies provide loans and credit to fishermen and fish farmers.	3 rd National Agriculture Policy
3.	Does policy include reducing the number of those engaged in fishing maintaining current numbers, or increasing/maximizing employment?	Reducing.	3 rd National Agriculture Policy
4.	Does policy include assistance to fishers to leave the fisheries sector or to supplement livelihoods from non-fishing activities?	Yes, to go into aquaculture, agriculture, etc. Surplus fishermen are diverted to the tourism sector, ferrying tourists to the parks, acting as tour or even dive guides.	3 rd National Agriculture Policy
5a.	Does policy refer to food security?	Yes, as a specific objective of NAP3.	3 rd National Agriculture Policy
5b.	If so, to what extent (if at all) is policy specific about whether fisheries should provide direct food security (i.e. fish being consumed domestically) or indirect food security (fish exported with money then available for food imports).		
Section E: Overall impression of policy trends			
<p>In summary, what are the main <i>trends and changes</i> in fisheries policy over the past 10 years. Please also consider in the response to this question that the seriousness with which a certain policy is pursued can often be measured by the share of the budget allocated to it, or by whether it finds expression in specific legislation or regulations.</p> <p>The policy trends in Malaysia now are:</p> <ul style="list-style-type: none"> • to at least maintain production of coastal capture fisheries by introducing good fisheries resource management and conservation; • to increase aquaculture production to offset the depleting production from capture fisheries; • to increase production of inland capture fisheries by reviving the depleting resource through fisheries co-management; and • to increase deep-sea production by encouraging more local vessels to venture into deep-sea fishing. 			

Policy Issue/Question	Answer	Supporting Reference
	<p>In the 9th Malaysia National Development Plan (2006-2010), big allocations are given to agriculture and fisheries development. In Sabah State, Inland Fisheries and Aquaculture Enactment 2003 is towards increase fish production with proper management control. In the Federal government level, it is stated in the Malaysia Fisheries Act 1985.</p> <p>Also note relevant to Section D above the Fisheries Development Authority of Malaysia (FDAM). FDAM is a statutory body established in 1971 with the objective of upgrading the social and economic status of the fishing communities, including fishermen, fish farmers and processors. FDAM has the authority to regulate fish marketing in the country. The establishment of landing complexes in major landing points, and the provision of auctioning service in such complexes are attempts to reduce the economic dependency of fishermen on the middlemen or wholesalers, hence increasing their income.</p> <p>Importance of CIDA support in improved policy.</p>	

Myanmar

Policy Issue/Question	Answer	Supporting Reference
Section A: Policy Targets/Indicators		
1a. Does policy contain specific development <i>targets</i> for capture fisheries?	30 years long-term plan (2001-2031) targets production of 4.15 million metric tonne from all fishery sector.	Policy poster
1b. If so, pls elaborate.		
2a. Does policy contain specific management <i>targets</i> for capture fisheries? e.g. area under MPAs, etc.	?	
2b. If so, pls elaborate.		
3a. Does policy contain specific development <i>targets</i> for aquaculture?	Aquaculture to develop 200000 acres with 5 tonnes per acre production rate by 2031. The Government of Myanmar published in 1999, a special plan to increase and develop shrimp and fish culture on 48583 ha and 26291 ha, respectively by 2003.	Policy poster
3b. If so, pls elaborate.		
4a. Does policy contain specific development <i>targets</i> for aquaculture?	?	
4b. If so, pls elaborate.		
5a. Does policy contain any other specific <i>targets</i> or <i>indicators</i> e.g. value of exports?	Export of 1.149 million tonne value of 2373 million US\$.	Policy poster
5b. If so, what are they. (List all)		
6. Is there a sense in development targets that aquaculture is more, less, or as important as capture fisheries production?	More. A Livestock and Fisheries Development Committee has been organized and a task force set up to work on a three-year plan for extended breeding and production of fish and shrimp.	FAO Country Review FAO TP 431
Section B: Natural Resource Management		
1. Does policy include the use of fishery co-management and/or community management?	?	
2. Does fisheries policy (as opposed to national non-sectoral policy) specifically provide for decentralization/devolution of management powers and responsibilities?	?	
3a. Does policy include attempts to expand national offshore fisheries e.g. through the use of larger vessels?	Yes. National fish production is expected to develop at a medium pace for the next few years. Total landing of marine catch is also expected to increase. The increase in marine fish production is	FAO Country Review BurmaNet New

Policy Issue/Question		Answer	Supporting Reference
3b.	If so, is such expansion at the expense of any foreign fishing interests currently operating in the country.	expected primarily to derive from deep-sea fishing. It is estimate that about 1 million tonnes of fish can be additionally exploited annually from this source. In 2001 Myanmar introduced new and stringent requirements on any Thai vessel operating in Myanmar's waters, effectively making it very difficult for Thai vessels to do so.	http://www.burmalibrary.org/reg.burma/archives/200108/msg00064.html
4.	Does policy encourage the movement of small-scale fisheries into offshore areas, due to resource constraints and technical improvements/efficiencies?	?	
5a. 5b.	Does policy specifically recognize and address any issues of over capacity? If so, what and how.	Yes, to the extent that a moratorium has been placed on the issuance of new or additional fishing licences for vessels to harvest in coastal waters. This is to ensure that the current high fishing pressure on the limited coastal fisheries resources will not be increased, and over time should result in reduced capacity. Myanmar responded favourably to the IPOA for the Management of Fishing Capacity, by putting in place: (i) a monitoring system, and (ii) a licensing regime. Every fishing activity in Myanmar's fishery industry is controlled by the licensing and registration system to control both the fishing vessels and their gear, under the current Fisheries Law and Union of Myanmar Foreign Investment Law 1995. Any attempt by fishermen to change the tonnage or engine power of fishing vessels or to construct fishing vessels require permission from the Director General of DoF and nautical approval from the respective authority.	FAO Country Review
6a. 6b.	Does policy refer to and/or deal with IUU fishing? If so, in what way.	The country responded favourably to the IPOA to Prevent, Deter and Eliminate IUU Fishing, through its current MCS system, and claims it bans vessels from its waters that practice re-flagging to avoid regional conservation and management measures.	FAO TP 488
7a. 7b.	Is policy attempting to introduce user rights to fishers? If so, how and in what way.	?	
8.	Does policy refer to need for integration/coordination with other sectoral policies?	?	
9. 9b.	Does policy mention ecosystems management? If so, what measures are suggested.	?	
10.	Does policy include the use of MPAs?	There are nursery area closures and no take zones. The State, having been empowered by the Forest Law 1992, declared all mangrove forests as protected areas. Fishing within three hundred	FAO Country Review FAO TP 488 FAO TP 431

Policy Issue/Question		Answer	Supporting Reference
		yards around mangrove areas is strictly prohibited. In order to ensure the sustainable development of aquaculture techniques and to promote mangrove-friendly aquaculture practices strict guidelines were laid down by the Department of Fisheries.	
11a.	Does policy include specific measures related to conflict management?	Yes. Two fishing zones have been established through a licensing scheme whereby zones are designated for specific fishing gear, classes of fishing vessels and ownership. This is an attempt to provide equitable allocation of resources and reduce conflicts between traditional and commercial fishers. Basically, the two fishing zones are: Fishing Zone 1, for coastal fisheries, extending from the shoreline to 5 nm in the northern area and to 10 nm in southern coastal areas; and Fishing Zone 2, from the outer limit of the Fishing Zone 1 out to the EEZ limit. Amending of the Fisheries Law of 1989 was to provide a more comprehensive legal framework to manage fisheries in national waters. This law was formulated to integrate and strengthen the legal framework relating to marine and inland fisheries and to, amongst other things, “strengthen systematically administrative activities to reduce conflict among the fishing communities”.	FAO Country Review
11b.	If so, what are they.		
Section C: Financial/economic and marketing issues			
1a.	Does policy provide for the provision of subsidies?	An enterprise covered by the Foreign Investment Law is entitled to a tax holiday period of three consecutive years inclusive of the year of commencement of production or services and also to a further reasonable period, provided the Commission considers such extension is appropriate in the interest of the State. In addition, the enterprise may obtain any or all of the following exemptions and reliefs: a. Exemption or relief from tax on profit held in reserve and ploughed back into the business within one year. b. Accelerated depreciation of capital assets. c. Relief from up to 50 percent of income tax on the profits arising from the export of goods produced by the enterprise concerned. d. Allowance for research and development expenditure which is necessarily incurred within the State. e. Right to carry forward and set-off losses up to three consecutive years from the year the loss is sustained. f. Right to deduct an amount of income tax paid to the State on behalf of a foreign employee from the assessable income of the enterprise.	FAO TCP Report 1998
1b.	What are the main form of “good” subsidies provided?		
1c.	If so, what are the main forms of “bad” subsidy provided and what is their time frame. (pls use your own judgment to decide whether subsidies (e.g. training, social support, boat building, fuel, etc.) are good or bad)		

Policy Issue/Question		Answer	Supporting Reference
		g. Exemption or relief from customs duties and/or other taxes on machinery equipment, components, spareparts, instruments and other materials imported during the period of construction. h. Similar exemption or relief on raw materials imported in the first three years' commercial production following the completion of construction.	
2.	Is there an overall thrust/trend towards reducing or increasing the level of subsidy provided?	?	
3.	Does policy include increasing attempts to introduce user payments e.g. charges imposed on the fishing industry?	Yes. Amending of the Fisheries Law of 1989 was to provide a more comprehensive legal framework to manage fisheries in national waters. This law was formulated to integrate and strengthen the legal framework relating to marine and inland fisheries and to, amongst other things, "get more revenue through fishery taxation".	FAO Country Review
4.	Does fisheries policy include mention of the need to support the traceability and/or certification of products?	?	
5a. 5b.	Does policy refer to increasing value-added? If so, how is this to be achieved.	?	
6.	Does policy refer to tariff barriers and/or free trade areas in the region?	?	
7.	Does policy seek to increase exports?	Sectoral and policies and objectives include to "increase meat and fish production for domestic consumption and share the surplus with other countries". Particular emphasis on shrimp. The national development goals and aspirations include food security, higher farm income, employment generation to absorb excess rural labour, and increase in export earnings.	FAO Country Review FAO TP 431
8a. 8b.	Are there any specific policy initiatives to improve the efficiency of fisheries administrations? e.g. public/private partnerships If so, pls elaborate.	Yes, DoF has also entered into several joint ventures with the private sector (both local and foreign companies) for fisheries operations.	FAO Country Review
Section D: Socio-economic and poverty issues			
1a. 1b.	Does policy refer to issues of poverty? If so, in what capacity e.g. references to PRSPs, non-fisheries sector poverty reduction strategies, etc.	Sectoral and policies and objectives include to "improve the socio-economic status of livestock and fisheries communities under the guidance of the Head of State".	FAO Country Review
2.	Does policy include mention of, or provide for, micro-finance?	?	
3.	Does policy include reducing the number of those engaged in fishing maintaining current numbers, or increasing/maximizing employment?	Increasing. The national development goals and aspirations include food security, higher farm income, employment generation to absorb excess rural labour, and increase in export earnings.	FAO TP 431
4.	Does policy include assistance to fishers to leave the fisheries sector or to supplement livelihoods from non-fishing activities?	?	

Policy Issue/Question		Answer	Supporting Reference
5a.	Does policy refer to food security?	Sectoral and policies and objectives include to “increase meat and fish production for domestic consumption and share the surplus with other countries”. The national development goals and aspirations include food security, higher farm income, employment generation to absorb excess rural labour, and increase in export earnings.	FAO Country Review FAO TP 431
5b.	If so, to what extent (if at all) is policy specific about whether fisheries should provide direct food security (i.e. fish being consumed domestically) or indirect food security (fish exported with money then available for food imports).		
Section E: Overall impression of policy trends			
In summary, what are the main <i>trends and changes</i> in fisheries policy over the past 10 years. Please also consider in the response to this question that the seriousness with which a certain policy is pursued can often be measured by the share of the budget allocated to it, or by whether it finds expression in specific legislation or regulations.			

Pakistan

Policy Issue/Question		Answer	Supporting Reference	Principal Driver (who?)	Principal Motivation (why?)
Section A: Policy Targets/Indicators					
1a.	Does policy contain specific development <i>targets</i> for capture fisheries?	The targeted production growth rate for the overall sector (including capture and culture, from marine and inland areas) has been established at 10 percent per annum. This target corresponds to the extra production needed to increase fish consumption from 1.2 kg to 5 kg per capita per year. It is unlikely that capture fisheries can grow at such a pace, and most of the production increases will come from aquaculture. However, policy contains some specific targets with respect to numbers of vessels equipped to target under-exploited resources.	National policy and strategy for fisheries and aquaculture development in Pakistan (2006) Part 1 and 2	Government, FAO, stakeholders through participatory policy development process over a one year period, and involving field level, district, provincial and national consultation through workshops and discussions.	The fisheries and aquaculture sectors have been gaining an increasing importance in the development policies. Since 1998, overall fish production has decreased by nearly 2 percent per annum. Ten Year Perspective Development Plan 2001-11 states that agricultural development will focus on producing high-value crops, fisheries, livestock and dairy products. The recently approved Poverty
1b.	If so, pls elaborate.				
2a.	Does policy contain specific management <i>targets</i> for capture fisheries? e.g. area under MPAs, etc.	Yes. Second part of 2006 policy document provides targets for indicators for all proposed activities in support of policy strategies and goals. For capture fisheries these include targets relating to a) area of degraded mangrove to be rehabilitated, b) number of IUU offences, c) size of shrimp fleet, d) numbers of artificial reefs, e) rates of by-catch and discards, f) number of protected areas and fish sanctuaries.	National policy and strategy for fisheries and aquaculture development in Pakistan (2006) Part 1 and 2		
2b.	If so, pls elaborate.				
3a.	Does policy contain specific development <i>targets</i> for aquaculture?	See 1 above. Plus Part 2 of the new policy document includes specific targets related to a) percent of potential areas in high priority zones brought under farming, b) area of land allocated to aquaculture, c) numbers of demonstration sites in high priority zones.	See 1 above		
3b.	If so, pls elaborate.				
4a.	Does policy contain specific management <i>targets</i> for aquaculture?	Yes. Second part of 2006 policy document provides targets for indicators for all proposed activities in support of policy strategies and goals. For aquaculture these include targets relating to a) registration of	National policy and strategy for fisheries and aquaculture		
4b.	If so, pls elaborate.				

Policy Issue/Question		Answer	Supporting Reference	Principal Driver (who?)	Principal Motivation (why?)
		fish farmers, b) specification of National Environmental Quality Standards, c) pollution issues.	development in Pakistan (2006) Part 2		
5a.	Does policy contain any other specific <i>targets</i> or <i>indicators</i> e.g. value of exports?	The new policy document has a strategy axis focussing on post harvest issues, with a wide range of activities and associated indicators proposed, relating to issues such as a) infrastructure development, b) output from pre-processing plants, c) number of boats with ice making facilities, d) quality control inspections e) utilization of bycatch f) 5 of fish transported in refrigerated containers g) number of export points to overseas markets, and h) establishment of export processing zones.	National policy and strategy for fisheries and aquaculture development in Pakistan (2006) Part 2		
5b.	If so, what are they. (List all)				
6.	Is there a sense in development targets that aquaculture is more, less, or as important than capture fisheries production?	Yes, in the sense that aquaculture is more likely to contribute to 10 percent per annum growth, and therefore to economic growth, food security, poverty alleviation. But policy provides equal focus in terms of activities to capture and aquaculture fisheries, and between marine and inland.	National policy and strategy for fisheries and aquaculture development in Pakistan (2006) Part 1 and 2		Reduction Strategy Paper (PRSP) of Pakistan, emphasizes the significant role of the fisheries sector.
Section B: Natural Resource Management					
1.	Does policy include the use of fishery co-management and/or community management?	Yes. The new policy has specified activities which include: a) engage in, and support, fisheries interests in all coastal area management and planning processes through a mechanism for cross-sectoral integration and participatory decision-making, b) create “District Fisheries and Aquaculture Development Committees” constituted of representatives of Fisheries/Aquaculture, Agriculture, Irrigation, WAPDA and banks to enhance the coordination and development of fisheries and aquaculture-related activities at district level, and c) <i>five</i> specific activities relating to the need to recognize and promote the role of communities in fisheries management in coastal and inland areas.	National policy and strategy for fisheries and aquaculture development in Pakistan (2006) Part 1 and 2	See response for Section A	Increasing recognition by government about the need for greater levels of participation.
2.	Does fisheries policy (as opposed to national non-sectoral policy) specifically provide for decentralization/devolution of management powers and responsibilities?	Yes. Strategy axis B of the new policy (institutional improvements and developments within the fisheries and aquaculture sectors) specifically mentions decentralization, and also provides a strong focus on devolution of management powers and decision-making from national government to district and provincial levels.	National policy and strategy for fisheries and aquaculture development in Pakistan (2006) Part 1 and 2		

Policy Issue/Question		Answer	Supporting Reference	Principal Driver (who?)	Principal Motivation (why?)
3a.	Does policy include attempts to expand national offshore fisheries e.g. through the use of larger vessels?	Yes. In addition to the 2006 policy document, a previous policy document on deep-sea fishing policy (entirely consistent and incremental to the 2006 policy document, and therefore still part of national policy) focuses on zones (shore to 12 nm, 12-35 nm, and outside 35 nm). Policy is now to reserve 0-12 nm for the small-scale/artisanal sector, 12-35 nm for medium-sized vessels (100-250 GRT), and outside 35 nm for industrial vessels (300 + GRT). Foreign vessels not excluded in 35 + nm zone as there is a realization that previous attempts to restrict industrial fishing to local investment has not been successful.	Deep-Sea Fishing Policy of 1995, as amended in 2001		Previous reservation of up to 35 nm for local small-scale interests did not result in local entrepreneurs establishing their own fleets, and resulted in under-exploitation of 23-35 nm zone.
3b.	If so, is such expansion at the expense of any foreign fishing interests currently operating in the country.				
4.	Does policy encourage the movement of small-scale fisheries into offshore areas, due to resource constraints and technical improvements/efficiencies?	Yes, see above, but a realization that to date this has not been successful. Also an awareness that many inshore resource are overexploited.	Deep-Sea Fishing Policy of 1995, as amended in 2001, and 2006 policy document		
5a.	Does policy specifically recognize and address any issues of over capacity?	Yes, under a strategy axis dealing with capture fisheries, specific activities focus on controlling fleet size and capacity, and relevant indicators are specified for this.	National policy (2006) Part 1 and 2	See response for Section A	
5b.	If so, what and how.				
6a.	Does policy refer to and/or deal with IUU fishing?	Yes. New policy requires Pakistan to sign up to international commitments/IPOAs on IUU. Other activities in the policy document specifically deal with IUU in inland and coastal waters, and for enhanced inter-ministry/department collaboration and staff dedicated to control IUU.			
6b.	If so, in what way.				
7a.	Is policy attempting to introduce user rights to fishers?	No.	N/a		N/a
7b.	If so, how and in what way.				
8.	Does policy refer to need for integration/co-ordination with other sectoral policies?	Yes. Of the 7 strategic axes in the policy (each with multiple activities tied to them), the first is specifically on strengthening of cross-sectoral collaboration and contains more than 30 specific activities.	2006 Policy document Parts 1 and 2.		Recognition of importance, especially in relation to water flows, land issues, power, and financial issues.

Policy Issue/Question		Answer	Supporting Reference	Principal Driver (who?)	Principal Motivation (why?)
9a.	Does policy mention ecosystems management?	Yes, in relation to training requirements, and also management of inland and marine capture fisheries.	2006 Policy document Parts 1 and 2.		Awareness of this issues is important.
9b.	If so, what measures are suggested.				
10.	Does policy include the use of MPAs?	Yes, it specified protected areas for coastal fisheries, and the provision of fish sanctuaries for inland capture fisheries.	2006 Policy document Parts 1 and 2.		Seen as important for sustainable management.
11a.	Does policy include specific measures related to conflict management?	Yes, under a cross-cutting strategy axis there are 5 specific activities on integrated coastal management, specifically aimed at reducing conflicts. Policy activities also include revision of legislation to remove/avoid conflicts.	2006 Policy document Parts 1 and 2.		Conflict regarding deep-sea resource management.
11b.	If so, what are they.				
Section C: Financial/economic and marketing issues					
1a.	Does policy provide for the provision of subsidies?	Yes, specifically as financial incentives to attract private sector investment needed to kick-start inland and coastal aquaculture. Factors mentioned in the policy as being appropriate for subsidies include fuel and electricity costs, hatchery establishment costs, farm machinery.	2006 Policy document Parts 1 and 2.	See response for Section A.	Perception that without such subsidies, it will be difficult to interest private sector investment. Measure is seen as short-term only as a catalyst.
1b.	What are the main forms of “good” subsidies provided?				
1c.	What are the main forms of “bad” subsidy provided and what is their time frame? (pls use your own judgment to decide whether subsidies (e.g. training, social support, boat building, fuel, etc.) are good or bad)				
2.	Is there an overall thrust/trend towards reducing or increasing the level of subsidy provided?	No.	N/a	See response for Section A.	N/a
3.	Does policy include increasing attempts to introduce user payments e.g. charges imposed on the fishing industry?	No.	N/a		N/a
4.	Does fisheries policy include mention of the need to support the traceability and/or certification of products?	Not specifically mentioned, but under strategy axis on post-harvest issues, activities do include issues relating to quality assurance schemes and HACCP, and to general improvements in quality.	2006 Policy document Parts 1 and 2.		Relatively poor export performance to date.
5a.	Does policy refer to increasing value-added?	Yes. Under strategy axis on post-harvest issues there are around 25 specific activities, almost all of which could be expected to increased value-added (e.g. through quality	2006 Policy document Parts 1 and 2.		Very little processing and added-value taking
5b.	If so, how is this to be achieved.				

Policy Issue/Question		Answer	Supporting Reference	Principal Driver (who?)	Principal Motivation (why?)
		improvements, access to international markets, infrastructure developments). Five of these activities are specifically addressed at increasing value-added through a) bycatch utilization, b) demonstration processing facilities, c) private sector processing facilities, and d) focus on small-scale processing.			place at present.
6.	Does policy refer to tariff barriers and/or free trade areas in the region?	Yes. In two contexts. Firstly duty free import of some items. And secondly there is policy activity to evaluate impacts of WTO.	2006 Policy document Parts 1 and 2		Awareness of potential impacts.
7.	Does policy seek to increase exports?	Yes. Strategy axis 3 includes 9 specific activities all aimed at increasing access to international markets.	2006 Policy document Parts 1 and 2		Relatively poor export performance to date.
8a. 8b.	Are there any specific policy initiatives to improve the efficiency of fisheries administrations? e.g. public/private partnerships If so, pls elaborate.	Yes, government is focusing strongly on private/public sector collaboration. Under cross-cutting axes, many activities require improved consultation and joint activities. Against all policy activities, partnerships are specified, and throughout the policy activities there is strong public/private sector cooperation required. An emphasis on the freeing-up the private sector to drive economic growth in the fisheries sector reflects wider government approached to development at present which focus strongly on agro-business.	2006 Policy document Parts 1 and 2	Government mainly	Government sees the private sector as being important, and more effective than government, in driving growth, and its own role as more facilitatory.
Section D: Socio-economic and poverty issues					
1a. 1b.	Does policy refer to issues of poverty? If so, in what capacity e.g. references to PRSPs, non-fisheries sector poverty reduction strategies, etc.	Yes. One of the 3 principal goals of policy is to “increase the contribution of the fisheries and aquaculture sectors to poverty alleviation”. Policy text refers to the United Nations World Summit on Sustainable Development 2002, the 2000 World Development Report published by the World Bank, the UN Millennium Declaration adopted in 2000 ¹² , and the 1996 UN World Food Summit, and the fact that all considered poverty alleviation as a central priority. Issues of land and water access are given strong priority in policy activities. PRSP does not features fisheries at all.	2006 policy document Part 1 and 2	Government	Supporting PRSP, and recognition that poverty levels, especially in many fishing communities are high
2.	Does policy include mention of, or provide for, micro-finance?	Yes, there is a specific activity to “support alternative and/or complementary livelihood activities in fishing communities through increasing access to credit and savings schemes and the provision of micro-finance initiatives”.	2006 policy document Part 1 and 2	See response for Section A	Important in accessing the very poor

¹² The Millennium Declaration contains the commitment to halve, by the year 2015, the proportion of the world’s population whose income is less than one dollar a day.

Policy Issue/Question		Answer	Supporting Reference	Principal Driver (who?)	Principal Motivation (why?)
3.	Does policy include reducing the number of those engaged in fishing, maintaining current numbers, or increasing/maximizing employment?	Policy contains 6 activities aimed at diversification of income generating activities and employment creation. These don't specifically require employment numbers to be cut, maintained or increased, but could result a variety of those outcomes. Increasing employment is not one of the three overall policy goals (which focus on poverty alleviation, food security, and economic growth).	2006 policy document Part 1 and 2	See response for Section A.	All three outcomes might be necessary in different situations/ locations.
4.	Does policy include assistance to fishers to leave the fisheries sector or to supplement livelihoods from non-fishing activities?	Yes partly, in that one activity specifies "support alternative and/or complementary livelihood activities in fishing communities through increasing access to credit and savings schemes and the provision of micro-finance initiatives".	2006 policy document Part 1 and 2	See response for Section A.	May be necessary for sustainability reasons.
5a.	Does policy refer to food security?	Yes. One of the 3 principal goals of policy is to "increase the contribution of the fisheries and aquaculture sectors to poverty alleviation" Not specific in relation to direct or indirect, but activities specified imply both.	Policy framework in 2006 policy document Part 1		N/a
5b.	If so, to what extent (if at all) is policy specific about whether fisheries should provide direct food security (i.e. fish being consumed domestically) or indirect food security (fish exported with money then available for food imports).				

Section E: Overall impression of policy trends

In summary, what are the main *trends and changes* in fisheries policy over the past 10 years. Please also consider in the response to this question that the seriousness with which a certain policy is pursued can often be measured by the share of the budget allocated to it, or by whether it finds expression in specific legislation or regulations.

The recent policy development process, supported by an FAO TCP project was very consultative and participatory. This in itself was reflective of recent trends by government towards a more inclusive attitude and decentralization. The extent to which all the policy activities, or some and not others, end up being implemented by Government (with appropriate budget provision) remains to be seen as the policy is implemented. A key shift in Government policy appears to be a strong reliance on the private sector agri-business to facilitate growth.

Philippines

Policy Issue/Question		Answer	Supporting Reference
Section A: Policy Targets/Indicators			
1a.	Does policy contain specific development <i>targets</i> for capture fisheries?	Yes.	Nothing in 1998 Code on targets. But included in medium term fisheries development plan of BFAR.
1b.	If so, pls elaborate.		
2a.	Does policy contain specific management <i>targets</i> for capture fisheries? e.g. area under MPAs, etc.	No.	
2b.	If so, pls elaborate.		
3a.	Does policy contain specific development <i>targets</i> for aquaculture?	Yes.	
3b.	If so, pls elaborate.		
4a.	Does policy contain specific development <i>targets</i> for aquaculture?	No.	
4b.	If so, pls elaborate.		
5a.	Does policy contain any other specific <i>targets</i> or <i>indicators</i> e.g. value of exports?	No.	
5b.	If so, what are they. (List all)		
6.	Is there a sense in development targets that aquaculture is more, less, or as important as capture fisheries production?	No.	
Section B: Natural Resource Management			
1.	Does policy include the use of fishery co-management and/or community management?	Yes. The policy environment in the Philippines now provides for the participation of community groups and other non-state actors in what have traditionally been considered state affairs. In addition, the 1987 Philippine Constitution, contains important provisions that invoke general protection of the environment, although responsibility rests primarily with the State. Legislated policy in the form of the preamble of the Philippines Fisheries Code of 1998 (Section 2. Declaration of Policy) confirms and enhances the co-management policy of the Government. The Philippine Fisheries Code is a complete departure from the previous policy/legislative direction of maximizing fishery utilization and pushing for fisheries as a preferred area for investment without the necessary social and environmental safety nets. The new law now provides for the preferential rights of small-scale fishers and, requires that their participation in aquatic councils be established in all coastal areas in the country.	Macfadyen et al., 2005
2.	Does fisheries policy (as opposed to national non-sectoral policy) specifically provide for decentralization/devolution of management powers and responsibilities?	Yes. In 1991, the Local Government Code became the country's centrepiece legislation on devolution. Through its implementation, the transfer of political power and responsibility from national to local government units was pursued. In addition, the law requires local governments to have people's and NGOs as active partners in the pursuit of local autonomy. The Fisheries Code of 1998 supports the Local Government Code and enables	Macfadyen et al., 2005

Policy Issue/Question		Answer	Supporting Reference
		the establishment of co-management units in the form of registered fisherfolk organizations and cooperatives. The Code provides for the establishment of Fisheries and Aquatic Resources Management Councils (FARMC) at national and municipal levels to carry out management advisory functions in collaboration with Local Government Units (LGUs). The Local Government Code of 1991 delegates to the local government units and people's organizations the task of managing their own resources: "Municipalities have the exclusive authority to grant fishery privileges in the municipal waters (15 km from the coastline) and impose rentals, fees, or charges".	
3a.	Does policy include attempts to expand national offshore fisheries e.g. through the use of larger vessels?	Yes. Code requires "optimal utilization of offshore and deep-sea resources" and provide incentives for commercial fishers to fish further offshore.	1998 Code
3b.	If so, is such expansion at the expense of any foreign fishing interests currently operating in the country.	b. Yes, Code states that policy is "to limit access to the fishery and aquatic resources of the Philippines for the exclusive use and enjoyment of Filipino citizens"...and "The protection of municipal fisherfolk against foreign intrusion shall extend to offshore fishing grounds".	
4.	Does policy encourage the movement of small-scale fisheries into offshore areas, due to resource constraints and technical improvements/efficiencies?	Not specific re moving small-scale offshore, but strong emphasis given to small-scale fishers. Small-scale fishers supported through the 1998 Code which states that policy is "to protect the right of fisherfolk, especially of the local communities..." and "Preference shall be given to resource users in the local communities adjacent or nearest to the municipal waters".	1998 Code
5a.	Does policy specifically recognize and address any issues of over capacity?	No, although the Govt. has endorsed the International Management of Fishing Capacity Agreement. But enactment into law has been slow.	FAO Country Review
5b.	If so, what and how.		
6a.	Does policy refer to and/or deal with IUU fishing?	Yes. 1998 Code has sections on unauthorized fishing (Section 86) and poaching in Philippine waters (Section 87), with fines for the latter set at one hundred thousand US Dollars (US\$100 000), in addition to the confiscation of its catch, fishing equipment and fishing vessel: Provided, that the Department is empowered to impose an administrative fine of not less than fifty thousand US Dollars (US\$50000) but not more than two hundred thousand US Dollars (US\$200000) or its equivalent in the Philippine currency.	1998 Code
6b.	If so, in what way.	And the Govt. endorsed the international agreement on IUU, but enactment of specifics in law has been slow.	FAO Country Review

Policy Issue/Question		Answer	Supporting Reference
7a.	Is policy attempting to introduce user rights to fishers?	Yes, licence and permits to fish, and the Code states that “The LGU concerned shall grant demarcated fishery rights to fishery organizations/cooperatives for mariculture operation in specific areas identified by the Department.”	1998 Code
7b.	If so, how and in what way.		
8.	Does policy refer to need for integration/coordination with other sectoral policies?	Code calls for integration between municipalities.	1998 Code
9.	Does policy mention ecosystems management?	Yes.	Executive Order 533
9b.	If so, what measures are suggested.		
10.	Does policy include the use of MPAs?	Yes. 1998 Code states that “The Department may establish fish refuge and sanctuaries to be administered in the manner to be prescribed by BFAR. At least twenty-five percent (25 percent) but not more than forty percent (40 percent) of bays, foreshore lands, continental shelf or any fishing ground shall be set aside for the cultivation of mangroves to strengthen the habitat and the spawning grounds of fish. Within these areas no commercial fishing shall be allowed. All marine fishery reserves, fish sanctuaries and mangrove swamp reservations already declared or proclaimed by the President or legislated by the Congress of the Philippines shall be continuously administered and supervised by the concerned agency”.	1998 Code
11a.	Does policy include specific measures related to conflict management?	No specific measures.	
11b.	If so, what are they.		
Section C: Financial/economic and marketing issues			
1a.	Does policy provide for the provision of subsidies?	There are provisions for subsidized credit for the fishers and farmers who engage in food and non-food production, processing and trading. The commercial fishers are eligible for subsidized long-term loans and tax and duty exemption to acquire or improve fishing vessels and related equipment. The duty and tax rebates are also applicable to fuel consumption for commercial fisheries. The Code (Section 35) also enshrines various incentives for fishing further offshore including long term loans, tax and duty exemption, duty and tax rebates. And the Code makes provision for a number of fisheries funds e.g. for aquaculture development, fishing vessel development, credit, soft loans etc. 1997 act also provides for extensive range of support.	ADB-RETA 5945 Project Website, WordFish Center 1998 Code 1997 Act
1b.	What are the main form of “good” subsidies provided?		
1c.	If so, what are the main forms of “bad” subsidy provided and what is their time frame. (pls use your own judgment to decide whether subsidies (e.g. training, social support, boat building, fuel, etc.) are good or bad)		
2.	Is there an overall thrust/trend towards reducing or increasing the level of subsidy provided?	?, but extensive range see above. And 1997 Act requires for “All existing credit guarantee schemes and funds applicable to the agriculture and fishery sectors shall be rationalized and consolidated into an Agriculture and Fisheries Credit Guarantee Fund”.	

Policy Issue/Question		Answer	Supporting Reference
3.	Does policy include increasing attempts to introduce user payments e.g. charges imposed on the fishing industry?	Yes. 1998 Code states that “The rentals for fishpond areas covered by the Fishpond Lease Agreement (FLA) and license fees for Commercial Fishing Boat License (CFBL) shall be set at levels that reflect resource rent accruing from the utilization of resources and shall be determined by the Department”. But increases in costs of management have not yet been converted to recoverable resource rents by government, and there is still strong reliance on donor funding.	1998 Code FAO Country Review
4.	Does fisheries policy include mention of the need to support the traceability and/or certification of products?	Not specifically, but Code requires BFAR to “implement an inspection system for import and export of fishery/aquatic products and fish processing establishments consistent with international standards to ensure product quality and safety”.	1998 Code
5a. 5b.	Does policy refer to increasing value-added? If so, how is this to be achieved.	Through “Upgrading of post-harvest technology”, and requirement for BFAR to develop value-added fishery-products for domestic consumption and export”. One of the objectives of the 1997 Act is to increase value-added processing.	1998 Code 1997 Act
6.	Does policy refer to tariff barriers and/or free trade areas in the region?	No.	
7.	Does policy seek to increase exports?	Requirement for BFAR to develop value-added fishery-products for domestic consumption and export”.	1998 Code
8a. 8b.	Are there any specific policy initiatives to improve the efficiency of fisheries administrations? e.g. public/private partnerships If so, pls elaborate.	To the extent that the 1998 Code has a specific chapter on the “Reconstitution of the Bureau of Fisheries and Aquatic Resources and Creation of Fisheries and Aquatic Resources Management Councils”. And rationalization and performance based evaluation system introduced for fisheries universities, and improvements to research institutions and extension provision specified in 1997 Act.	1998 Code 1997 Act
Section D: Socio-economic and poverty issues			
1a. 1b.	Does policy refer to issues of poverty? If so, in what capacity e.g. references to PRSPs, non-fisheries sector poverty reduction strategies, etc.	Yes. The Code states that an objective is “Poverty alleviation and the provision of supplementary livelihood among municipal fisherfolk”. And 1997 Act states that “the State shall ensure the development of the agriculture and fisheries sectors in accordance with the following principles: Poverty Alleviation and Social Equity – The State shall ensure that the poorer sectors of society have equitable access to resources, income opportunities, basic and support services and infrastructure especially in areas where	1998 Code

Policy Issue/Question		Answer	Supporting Reference
		productivity is low as a means of improving their quality of life compared with other sectors of society....”	
2.	Does policy include mention of, or provide for, micro-finance?	No, but the Code talks of credit for small fishers, as does 1997 Act.	1998 Code 1997 Act
3.	Does policy include reducing the number of those engaged in fishing maintaining current numbers, or increasing/maximizing employment?	Maximizing. 1997 Modernization Act states that “the State shall promote industrialization and full employment”.	1997 Modernization Act
4.	Does policy include assistance to fishers to leave the fisheries sector or to supplement livelihoods from non-fishing activities?	Not specific.	
5a. 5b.	Does policy refer to food security? If so, to what extent (if at all) is policy specific about whether fisheries should provide direct food security (i.e. fish being consumed domestically) or indirect food security (fish exported with money then available for food imports).	The Fisheries Code of 1998 states that food security is “the overriding consideration in the utilization, management, development and conservation and protection of fishery resources”. And 1997 Modernization Act states that “The State shall promote food security” and that “the State shall ensure the development of the agriculture and fisheries sectors in accordance with the following principles: Food Security – The State assure the availability adequacy, accessibility and affordability of food supplies to all times.	Green, S. et al., 1998 Code 1997 Modernization Act
Section E: Overall impression of policy trends			
In summary, what are the main <i>trends and changes</i> in fisheries policy over the past 10 years. Please also consider in the response to this question that the seriousness with which a certain policy is pursued can often be measured by the share of the budget allocated to it, or by whether it finds expression in specific legislation or regulations.			

Republic of Korea

Policy Issue/Question		Answer	Supporting Reference
Section A: Policy Targets/Indicators			
1a. 1b.	Does policy contain specific development <i>targets</i> for capture fisheries? If so, pls elaborate.	No.	
2a. 2b.	Does policy contain specific management <i>targets</i> for capture fisheries? e.g. area under MPAs, etc. If so, pls elaborate.	<ul style="list-style-type: none"> Number of species under TACs. 9 by 2004 Buy-back and reduction in vessels numbers and tonnage. 	MOMAF Website
3a. 3b.	Does policy contain specific development <i>targets</i> for aquaculture? If so, pls elaborate.	?	
4a. 4b.	Does policy contain specific management <i>targets</i> for aquaculture? If so, pls elaborate.	Yes. About 10 percent of aquaculture facilities will be reduced over the next five years, and new licenses will not be issued for such products as laver, sea-mustard and excessively-produced fishes. By contrast, technologies for harvesting tuna, mackerel and other high value-added species will be newly developed.	

Policy Issue/Question		Answer	Supporting Reference
5a.	Does policy contain any other specific <i>targets</i> or <i>indicators</i> e.g. value of exports?	<ul style="list-style-type: none"> • MOMAF is planning to increase its investment in research and development in the marine and fisheries sectors to 10 percent of its total R&D budgets by 2010. • Recognizing that the Republic of Korea is facing the depletion of fish stocks, MOMAF has established targets and strategies for expanding the range of fishermen-oriented co-management fisheries nationwide as well as encouraging active participations of fishermen. • Artificial reefs. • Quality seedling/releasing project. 	MOMAF Website
5b.	If so, what are they. (List all)		
6.	Is there a sense in development targets that aquaculture is more, less, or as important as capture fisheries production?	Strong emphasis on aquaculture.	OECD, 2002
Section B: Natural Resource Management			
1.	Does policy include the use of fishery co-management and/or community management?	<p>Yes. The Korean Government has started a fishermen-oriented co-management system for more effective implementation of responsible fisheries. Under this system, an organization of fishermen such as a fishery corporation or a group of fishermen in fishing villages set up self-regulation according to the fishery-related laws and regulations with endorsement of local government; thereby fishery is controlled. The fishermen-oriented co-management system is designed to enhance the sense of responsibility of the fishermen and to prevent illegal fishing.</p> <p>The MOMAF Website states that “Korea keenly recognizes that the government’s top-down, command and control approach to fisheries management does not work well. Therefore, the concept of co-management has brought attention to management practices that would perhaps otherwise have been neglected. A new framework for “fishermen-oriented co-management fisheries” was launched in 2001 in order to encourage active participations of Korean fishermen”.</p>	<p>OECD, 2002</p> <p>MOMAF Website</p>
2.	Does fisheries policy (as opposed to national non-sectoral policy) specifically provide for decentralization/devolution of management powers and responsibilities?	Yes. Korean fisheries management is based on the Fishery Act together with many related acts and regulations. According to the Act, the Ministry of Maritime Affairs and Fisheries (MOMAF) is largely responsible for fishing vessels in offshore and distant waters and foreign-flagged vessels fishing within the Korean EEZ, while local governments at province, city and district levels are mainly responsible for fishing licenses of vessels in the coastal area.	OECD, 2002
3a.	Does policy include attempts to expand national offshore fisheries e.g. through the use of larger vessels?	Scheduled to be completed by 2005, a research project led by the Korea Ocean Research and Development Institute (KORDI) is currently underway to develop the deep-sea waters for use as food, aquaculture, natural materials, and other uses.	MOMAF Website
3b.	If so, is such expansion at the expense of any foreign fishing interests currently operating in the country.		

Policy Issue/Question		Answer	Supporting Reference
4.	Does policy encourage the movement of small-scale fisheries into offshore areas, due to resource constraints and technical improvements/efficiencies?	?	
5a.	Does policy specifically recognize and address any issues of over capacity?	Yes, management policy includes restricting both the number and tonnage of fishing vessels.	OECD, 2001
5b.	If so, what and how.	To address chronic overexploitation of marine fishery resources by over-capacity in coastal and offshore waters, the fleet reduction programme known as the “General Buy-back Programme” has been strengthened since 1994. In 2001, 113 fishing vessels were scrapped under the programme. Moreover, “Buy-back Programme by the International Agreements,” another buy-back scheme, has been ongoing since the “Special Act for Supporting Fishermen Affected by the International Fishery Agreements” entered into force on 7 December 1999 which aimed at compensating fishermen for losses resulting from the international fishery agreements, including agreements with Japan and China. In accordance with this Act, the Korean Government scrapped 551 vessels in 2001. Government financial transfers totaled KRW 550 billion in 2001, an increase of KRW 192.7 billion (54 percent) from KRW 367.3 billion in 2000, mainly due to the buy-back programmes.	OECD, 2002
6a.	Does policy refer to and/or deal with IUU fishing?	Yes. Korea is reported to be strengthening law enforcement activities to eliminate illegal fishing activities.	OECD, 2002
6b.	If so, in what way.	The Korean Government now has a published a National Plan of Action on IUU fishing.	NPOA
7a.	Is policy attempting to introduce user rights to fishers?	Marine fisheries management policy of Korea is considered as a permit system rather than quota system in regulating fisheries activities, and a limited access system rather than an open access system in regulating an access to the fishing area. But Korea is gradually introducing TACs and the Total Allowable Catch (TAC) system, an alternative to the current fishing license system, has been implemented for seven species in 2001 after the experimental period of 1999-2000. New Ocean policy supports sustainable fisheries “through the early establishment of a TAC system in Phase 1 and an individual transferable quota (ITQ) system in Phase 2”.	OECD, 2001 and OECD, 2002
7b.	If so, how and in what way.		Ocean Korea 21
8.	Does policy refer to need for integration/ coordination with other sectoral policies?	Two committees have been established to facilitate coordination among all responsible organizations. These are the Commission on Protection of the Quality and Supply of Fresh Water Resources, which sits under the office of the Prime Minister, and the Committee of Maritime Pollution Response of MOMAF (MOMAF, 2003).	FAO Country Review

Policy Issue/Question		Answer	Supporting Reference
9a.	Does policy mention ecosystems management?	<p>Yes. Ocean Korea 21 states that “We will also work to conserve coastal ecosystems by mapping estuaries and passing laws to create wetland conservation areas. And we will continue to develop technology to prevent or mitigate the effects of red tides”.</p> <p>Korean Government has endeavored to conserve living species and biodiversity by conducting a survey extending from its coasts to the Exclusive Economic Zone of its marine ecosystem and by designating the places with high natural and ecological value as Marine Ecosystem Preservation Areas based on the outcome. Worked out in August 2000, the Integrated Coastal Management Plan reflected 29 sites including Dudo of Busan and Moonsum Island of Jeju Province as candidates for marine ecosystem preservation areas, which will be designated as such year by year beginning 2002.</p>	<p>Ocean Korea 21</p> <p>MOMAF Website</p>
9b.	If so, what measures are suggested.		
10.	Does policy include the use of MPAs?	<p>Yes, there are prohibitions on fishing in certain areas. The Korean Government has been operating Fishery Resources Protected Areas (FRPA) to protect fish habitats and spawning grounds. In 2002, 10 FRPAs were designated across the coastal areas. In those areas and neighbouring areas, any reclamation of coastal wasters is restricted, the purifying facilities to mitigate marine pollution are expanded, and any discard of pollutants is prohibited. Also, the Wetland Conservation Act enforced as of 9 August 1999 makes it possible for the Government to designate a wetland sanctuary which restricts human activities such as fishing, building, dredging, etc.</p>	OECD, 2002
11a.	Does policy include specific measures related to conflict management?	?	
11b.	If so, what are they.		
Section C: Financial/economic and marketing issues			
1a.	Does policy provide for the provision of subsidies?	<p>Yes. In order to achieve balanced development between rural and urban communities, the government divided fishing communities into 160 areas and gave supports to their production facilities, income-building facilities and welfare facilities.</p> <p>In addition, to facilitate a fishermen-oriented co-management fishery, a government-based support system will be established with the participation of civil experts to aid fishermen-oriented co-management communities with relative weaknesses. At the same time, rewards such as financial assistance will be provided to the communities with the best results. A total of US\$17 million was spent in assisting 106</p>	<p>FAO Country Review</p> <p>MOMAF Website</p>
1b.	What are the main form of “good” subsidies provided?		
1c.	<p>If so, what are the main forms of “bad” subsidy provided and what is their time frame.</p> <p>(pls use your own judgment to decide whether subsidies (e.g. training, social support, boat building, fuel, etc.) are good or bad)</p>		

Policy Issue/Question		Answer	Supporting Reference
		fishermen-oriented co-management communities during 2002-2003, with a focus on releasing of fry, upgrading freezing and refrigerating facilities and warehouses, improving fishing grounds.	
2.	Is there an overall thrust/trend towards reducing or increasing the level of subsidy provided?	?	
3.	Does policy include increasing attempts to introduce user payments e.g. charges imposed on the fishing industry?	No.	OECD, 2001
4.	Does fisheries policy include mention of the need to support the traceability and/or certification of products?	Yes through HACCP. To secure food safety and harmonize with international standards of food quality, Fishery Products Quality Control Act, which integrated the acts on control of fishery products quality, was newly enacted as of 29 January 2001 and effectuated as of 1 September 2001. The act introduced HACCP (Hazard Analysis Critical Control Point) system. According to this act, as of 14 March 2002, the Korean Government established a Ministerial decree which set the HACCPs for fishery products and commodities intended for export and will expand the coverage of this system to other producing and processing facilities.	OECD, 2002
5a. 5b.	Does policy refer to increasing value-added? If so, how is this to be achieved.	Yes, especially in aquaculture. Technologies for harvesting tuna, mackerel and other high value-added species will be newly developed. By turning to more advanced aquaculture fisheries within the next five years, the Ministry plans to encourage the industry to reduce production costs so it can be more competitive with imported products.	MOMAF Website
6.	Does policy refer to tariff barriers and/or free trade areas in the region?	?	
7.	Does policy seek to increase exports?	Yes, see 4 above. But also strong domestic demand which must be satisfied. In 2001, Korea recorded a trade deficit of USD374 million in fishery products for the first time due to declining exports to Japan following economic depression and increasing imports from China.	OECD, 2002
8a. 8b.	Are there any specific policy initiatives to improve the efficiency of fisheries administrations? e.g. public/private partnerships If so, pls elaborate.	Yes. Policy states that MOMAF “will help develop 20 to 30 promising venture capital firms every year”.	Ocean Korea 21
Section D: Socio-economic and poverty issues			
1a. 1b.	Does policy refer to issues of poverty? If so, in what capacity e.g. references to PRSPs, non-fisheries sector poverty reduction strategies, etc.	Not specifically but the main objective of ROK marine capture fishery management policies is to improve the both the fishermen’s and consumers’ welfare through restructuring the management of the fishery resources in the coastal and offshore waters (OECD, 2003c).	FAO Country Review, OECD, 2002
2.	Does policy include mention of, or provide for, micro-finance?	?	

	Policy Issue/Question	Answer	Supporting Reference
3.	Does policy include reducing the number of those engaged in fishing maintaining current numbers, or increasing/maximizing employment?	Reducing in capture and increasing in aquaculture. The population in fisheries has continuously dropped since 1982. The number of fisheries households also dropped 4.7 percent from 81751 in 2000 to 77717 in 2001. The number of fisheries households in 2001 can be broken down to 42.9 percent with fishing vessels, 23.6 percent without fishing vessels, and 32.6 percent in aquaculture. The number of households in 2001 in capture fisheries was reduced by 7.7 percent (534 households) than that in 2000, but that of aquaculture increased by 2 percent (10 534 households) due to the government policy to enhance aquaculture.	OECD, 2002
4.	Does policy include assistance to fishers to leave the fisheries sector or to supplement livelihoods from non-fishing activities?	Yes under the “Fishery Structural Adjustment Program”: Under this program the displaced fishers are entitled to compensation from the Government for the closure of fishing grounds, and the withdrawal of their fishing vessels; so far, the fishery structural adjustment policy has given priority to the management of small-scale coastal fisheries mainly because of the negative impacts of these fisheries on the breeding of juvenile and young fish in coastal waters (Lee, 2000).	FAO Country Review
5a. 5b.	Does policy refer to food security? If so, to what extent (if at all) is policy specific about whether fisheries should provide direct food security (i.e. fish being consumed domestically) or indirect food security (fish exported with money then available for food imports).	Not directly, but to secure food safety and harmonize with international standards of food quality, the Korean Government has enacted the “Fishery Products Quality Control Act”, which integrated the acts on control of fishery products quality, on 29 January 2001 and effectuated on 1 September 2001.	

Section E: Overall impression of policy trends

In summary, what are the main *trends and changes* in fisheries policy over the past 10 years. Please also consider in the response to this question that the seriousness with which a certain policy is pursued can often be measured by the share of the budget allocated to it, or by whether it finds expression in specific legislation or regulations.

Major policy trends include (OECD 2002 and FAO Country Review):

- buy-back scheme
- introduction of TACs
- continuing use of foreign bilateral access agreements for Korean vessels to fish in other countries’ waters.
- As of 29 January 2000, the Farming Ground Management Act was enacted to build a sustainable fishery and to improve the productivity of farming grounds. The Act introduces a system of sabbatical years for mariculture grounds for efficiency, inspection and standardization of environment of fishing grounds, etc.
- the Culture-based Fishery Promotion Act was enacted as of 14 January 2002. According to this act, the government shall establish a framework to promote culture-based fisheries every 5 years.

Sri Lanka

Policy Issue/Question		Answer	Supporting Reference
Section A: Policy Targets/Indicators			
1a.	Does policy contain specific development <i>targets</i> for capture fisheries?	Not at national level in main policy document.	2002 Policy
1b.	If so, pls elaborate.	NAQDA policy within context of national policy is to increase the annual production from inland capture fisheries and aquaculture sector (freshwater fish and freshwater/brackish water prawns) to 55000 mt in 2007 from the present level of 25000-30000 mt per annum.	http://www.naqda.gov.lk/pages/goals.asp
2a.	Does policy contain specific management <i>targets</i> for capture fisheries? e.g. area under MPAs, etc.	No. But the Fisheries Minister has made the vision statement that Sri Lanka is to emerge as the leading nation in the Indian Ocean by the year 2008 with respect to the sustainable use of fisheries and ocean resources.	FAO Country Review
2b.	If so, pls elaborate.		
3a.	Does policy contain specific development <i>targets</i> for aquaculture?	Not at national level in main policy document.	http://www.naqda.gov.lk/pages/goals.asp
3b.	If so, pls elaborate.	NAQDA policy within context of national policy is to increase the annual production from inland capture fisheries and aquaculture sector (freshwater fish and freshwater/brackish water prawns) to 55000 mt in 2007 from the present level of 25000-30000 mt per annum.	2002 Policy
4a.	Does policy contain specific management <i>targets</i> for aquaculture?	No.	2002 Policy
4b.	If so, pls elaborate.		
5a.	Does policy contain any other specific <i>targets</i> or <i>indicators</i> e.g. value of exports?	Yes. Development goals of the national policy are:	Fisheries and Ocean Resources Sector Policy and Development Plan (2002)
5b.	If so, what are they. (List all)	<ul style="list-style-type: none"> • To increase the contribution of the fisheries sector to the Gross Domestic Product from the present level of 2.7 to 4 percent during the next 10 years. • To ensure an increased national per capita availability of fish from the present 17 kg to at least 30 kg and an increased protein intake among the population in 10 years. • To broaden the distribution of benefits from the fisheries sector by increasing the economic livelihoods of the fisher community from the present level of 250000 to 500000 persons and contribute to alleviation of poverty. • To strengthen, services to the fishing communities and regulatory activities while providing employment in the institutional sector by increasing the present manpower under MOFAR from the present 4000 to 15000 in 5 years. • To mobilize at least 10000 fishermen as a resource protection force by training, motivating and equipping them to protect fisheries and ocean resources in the EEZ. <p>Also, NAQDA policy goals within overall policy context include:</p> <ul style="list-style-type: none"> • Increase the consumption of freshwater fish and fish products by at least 2 kg in terms of per 	http://www.naqda.gov.lk/pages/goals.asp

Policy Issue/Question	Answer	Supporting Reference	
	<p>capita in 2007 and promote the consumption of processed freshwater fish products.</p> <ul style="list-style-type: none"> • Elevate the income level of around 100000 rural households above the poverty line by promoting rural aquaculture enterprises through increasing the availability of credit, training and transfer of aquaculture technology. • Generate around 10000 employment opportunities by encouraging large and medium scale private sector investments, in various subsectors of aquaculture. Out of this, it is expected to generate around 500 direct job opportunities through the proposed co-management programmes as envisaged by the New Fisheries Policy of the Government. • Strengthen the institutional capacity of the National Aquaculture Development Authority in order to achieve the above mentioned goals in an efficient, professional and cost effective manner. 		
6.	Is there a sense in development targets that aquaculture is more, less, or as important as capture fisheries production?	More given that no targets in national policy, but NAQDA has targets that are policy.	2002 Policy
Section B: Natural Resource Management			
1.	Does policy include the use of fishery co-management and/or community management?	<p>Yes. Policy mission statement is “To direct all resources, including the community and institutions, through community-based management and the use of appropriate technology, aiming at satisfying the needs of the present and future generations, while ensuring the sustainability of the fisheries and aquatic resources” and policy requires that “community-based management structures called “Fisher Peoples Councils” (FPC) shall be established at the landing site level (or in reservoirs, perennial and seasonal tanks, lakes, lagoons), entrusted with the major task of managing fisheries resources.”</p> <p>One of the overarching policies of the Department of Fisheries and Aquatic Resources is the requirement for transparency, consultation and involvement of stakeholders in management planning and implementation. And the Fisheries and Aquatic Resources Act (Act No. 2 of 1996) provides for the designation by the Minister responsible for fisheries of “prescribed areas of Sri Lanka Waters or land adjacent thereto or both such waters and land as fisheries management areas for the purposes of this Act” (Section 31 (1) (a)). Registered fishermen residing or engaged in fishing in a fisheries management area or part thereof, or migrant fishermen, may form themselves into a fisheries committee (Section 32 (1) of Act No. 2</p>	<p>2002 Policy</p> <p>Macfadyen et al., 2005</p> <p>FAO Country Review 2006</p>

	Policy Issue/Question	Answer	Supporting Reference
		<p>of 1996).” Legislation is used to demarcate areas for different users/gears or fisheries committees. And under the 1996 Act, by 2004, seven management areas had been declared under the Act for the management of fisheries resources through community participation.</p> <p>In addition, an advisory body, known as the Fisheries and Aquatic Resources Advisory Council and headed by the Secretary to the Ministry responsible for fisheries, is established at the central level to advise the Minister responsible for fisheries on all matters relating to the management, regulation, conservation and development of fisheries and aquatic resources in Sri Lanka waters. Representatives of the fishermen are among the membership (Section 3 and 4 of Act No. 2 of 1996).</p> <p>The Coast Conservation Act, 1981 is also relevant and makes provision for the identification of special coastal areas needing management and the establishment of management committees with the participation of all stakeholders, including fishers. The SAM process deals with planning and conflict both within the fisheries sector, and between fisheries and other sectors. Areas are identified as areas needing Special Management Measures in the legislation.</p>	
2.	Does fisheries policy (as opposed to national non-sectoral policy) specifically provide for decentralization/devolution of management powers and responsibilities?	Local Fisheries Management Authorities under the new Act have the power to make recommendations to the Minister on: the conduct of fishing operations and the use of different types of fishing gear in a particular local fishing management; closed seasons for fishing or closed seasons for catching of specified species of fish in the area; the times during which fish may be taken.	Macfadyen et al., 2005
3a. 3b.	Does policy include attempts to expand national offshore fisheries e.g. through the use of larger vessels? If so, is such expansion at the expense of any foreign fishing interests currently operating in the country.	Yes. “Although proper assessment of resources has not been done, it is assumed that these resources still remain under-utilised”.	2002 Policy
4.	Does policy encourage the movement of small-scale fisheries into offshore areas, due to resource constraints and technical improvements/efficiencies?	Yes. “Subsidies and subsidized credit granted to facilitate movement of coastal fishermen into less – exploited offshore and deep-sea resources could facilitate this transfer”.	2002 Policy
5a. 5b.	Does policy specifically recognize and address any issues of over capacity? If so, what and how.	Capacity reduction measures appear to have utilized licensing as a reduction measure as well as the introduction of soft loans and credit to encourage alternative livelihoods. Registration of fishing craft in operation. Introduction of operation licensing system. Modernizing the data collection system.	FAO Country Review 2002 Policy

Policy Issue/Question		Answer	Supporting Reference
		Policy requires “Research to arrive at maximum fleet sizes for different categories of fishing vessels and/or type and number of gear, based on Total Allowable Catch (which shall be set below the Maximum Sustainable Yield) shall be undertaken aiming at limiting effort”.	
6a.	Does policy refer to and/or deal with IUU fishing?	Established fish landing regulations for re-flagged fishing vessels.	FAO Country Review
6b.	If so, in what way.		
7a.	Is policy attempting to introduce user rights to fishers?	No. In Sri Lanka, output control tools such as Total Allowable Catch (TAC) limits, individual transferable quotas (ITQs) or non-transferable quotas have not yet been introduced. In fact policy objectives include “to ensure the rights of the Sri Lankan citizens to use and enjoy the common fisheries and aquatic resources of Sri Lanka”, and “to grant the privilege to utilize fisheries and aquatic resources to any citizen under the guidance of the State, in the development, management, and conservation of the resources” effectively enshrining open access.	FAO Country Review 2006 2002 Policy
7b.	If so, how and in what way.		
8.	Does policy refer to need for integration/coordination with other sectoral policies?	Yes. Sri Lanka is unique in that it utilizes an integrated management approach for coastal areas, especially for designated areas under management. These are called Special Area Management (SAMs) areas. The process is lead by the Coastal Conservation Department (CCD) however, it includes the Department of Fisheries and Aquatic Resources (DFAR) and all stakeholders in the extensive consultation, planning and implementation processes for all matters including fisheries, road transport, zonation of lagoons and selected coastal areas for conservation, tourism, industry, and fisheries exploitation. Regional Directors are actively involved in local fisheries management committees for fisheries management and development. Policy also requires a “A Fisheries Monitoring, Control and Surveillance Coordinating Committee (MCSCC)” with cross-ministerial representation”.	FAO Country Review 2002 Policy
9a.	Does policy mention ecosystems management?	Yes. “The state shall take steps to establish a process of ecosystem-based fisheries management by collecting scientific information, greater coordination of existing research and information between fisheries and environmental disciplines and launching new research programmes”, and “The State shall ensure that levels and patterns of exploitation, do not imperil the soundness of the resource, its environment or the ecosystem on which biodiversity and long-term sustainable yields depend”.	2002 Policy
9b.	If so, what measures are suggested.		

Policy Issue/Question		Answer	Supporting Reference
10.	Does policy include the use of MPAs?	Yes, Declaration of fishing reserves is included in Sections 36-37 of the Act. Policy states that “The state shall take steps to identify environmentally more sensitive areas, which have been heavily exploited and need to be protected from such exploitation and, declare them as Marine Protected Areas (MPA) when and when necessary”.	FAO Country Review 2002 Policy
11a. 11b.	Does policy include specific measures related to conflict management? If so, what are they.	Special Area Management (SAM) process deals with conflict both within the fisheries sector, and between fisheries and other sectors. When conflicts among stakeholders are likely to lead to resource depletion/degradation in environmentally sensitive areas, these areas are identified first as areas needing Special Management Measures in the legislation. Management of such resources is then carried out by a SAM Committee consisting of representatives of all stakeholders. This has worked quite well in Sri Lanka. Two such management sites are the Hikkaduwa and the Rekawa coastal areas. Disputes between user groups have been settled by government over a number of decades using a dispute resolution mechanism that has resulted in specific local regulations being made, and which can be thought of as a form of co-management. Fisheries Ordinance 1940 contains detailed provisions to deal with disputes. Sections 20 and 20A, provide regulations to appoint a Committee of Inquiry or a Commissioner to deal with fishing disputes. Many area-specific regulations have resulted from this process. 2002 policy document has a section on access which includes issues which will reduce conflict e.g. zoning, access to beaches and landing sites, etc. And states that “The state shall provide all facilitative functions to ensure that conflicts among resources users, especially between those using inland water bodies for agricultural and fisheries purposes are resolved through proper coordination of the activities of multiple stakeholders, with the support of the relevant authorities”.	Macfadyen et al., 2005 FAO Country Review 2002 Policy
Section C: Financial/economic and marketing issues			
1a. 1b. 1c.	Does policy provide for the provision of subsidies? What are the main form of “good” subsidies provided? If so, what are the main forms of “bad” subsidy provided and what is their time frame. (pls use your own judgment to decide whether subsidies (e.g. training, social support, boat building, fuel, etc.) are good or bad)	Strong history of social support/subsidies e.g.: repatriation, support for families losing fishermen at sea, training courses, cooperatives (many of which were established with State support and subsidized boats, engines, etc.) fleet development in the 1950s, provision of first aid boxes recently. The Fishermen’s Pension and Social Security Benefit Scheme Act, No. 23 of 1990, provides periodic pensions to fishers in old age, provides	Amarasinghe FAO Country Review 2006 2002 Policy

	Policy Issue/Question	Answer	Supporting Reference
		<p>insurance against physical disability, or a gratuity in the event of the death of a fisher.</p> <p>Capacity reduction measures appear to have utilized licensing as a reduction measure as well as the introduction of soft loans and credit to encourage alternative livelihoods.</p> <p>Policy document states that “State subsidies, if available, be granted to fishermen through community organizations, to adopt eco-friendly, selective type of gear and techniques”. Policy document also provides for price support.</p>	
2.	Is there an overall thrust/trend towards reducing or increasing the level of subsidy provided?	<p>More targeted. Policy states that</p> <ul style="list-style-type: none"> ● “Trade distorting subsidies to fisheries shall be gradually removed. ● Subsidies to help asset-poor fishermen to adopt new technology, those that lead to a shift of focus from heavily exploited to under-exploited or unexploited areas, and those granted to help certain target groups or individuals to engage in economically important and sustainable fisheries activities, shall be maintained. ● Subsidies granted to all non-sustainable activities shall be terminated. 	2002 Policy
3.	Does policy include increasing attempts to introduce user payments e.g. charges imposed on the fishing industry?	Small licence fees, and little progress towards user fees commensurate with management costs.	FAO Country Review
4.	Does fisheries policy include mention of the need to support the traceability and/or certification of products?	No.	
5a. 5b.	Does policy refer to increasing value-added? If so, how is this to be achieved.	One policy objective in national policy and development plan is “to enhance the contribution of the fisheries and aquatic resources sector to employment generation, living opportunities and, to make it one of the major contributing sectors to the national economy through marked orientation and increased value addition”.	2002 Policy
6.	Does policy refer to tariff barriers and/or free trade areas in the region?	No.	
7.	Does policy seek to increase exports?	Yes, policy document section on marketing and trade.	FAO Country Review 2002 Policy
8a. 8b.	Are there any specific policy initiatives to improve the efficiency of fisheries administrations? e.g. public/private partnerships If so, pls elaborate.	Yes. In the context of the Fisheries and Ocean Resources Sector Policy and Development Plan (2002), the NAQDA Website states that “The private sector is expected to play a major role in this development and the role of State will primarily be that of a facilitator as well as the trustee and the guardian of resources. In this development process the private sector, both local and foreign, is encouraged to enter into partnerships with the state agencies”.	http://www.naqda.gov.lk/pages/goals.asp

Policy Issue/Question		Answer	Supporting Reference
		<p>Also, NAQDA policy goals within overall policy context include:</p> <ul style="list-style-type: none"> Strengthen the institutional capacity of the National Aquaculture Development Authority in order to achieve the above mentioned goals in an efficient, professional and cost effective manner. <p>Main policy document has sections on both institutional strengthening and human resources development training.</p>	
Section D: Socio-economic and poverty issues			
1a.	Does policy refer to issues of poverty?	Yes. One of the goals is:	Fisheries and Ocean Resources Sector Policy and Development Plan (2002)
1b.	If so, in what capacity e.g. references to PRSPs, non-fisheries sector poverty reduction strategies, etc.	<ul style="list-style-type: none"> To broaden the distribution of benefits from the fisheries sector by increasing the economic livelihoods of the fisher community from the present level of 250000 to 500000 persons and contribute to alleviation of poverty. <p>Also, NAQDA policy goals within overall policy context include:</p> <ul style="list-style-type: none"> Elevate the income level of around 100000 rural households above the poverty line by promoting rural aquaculture enterprises through increasing the availability of credit, training and transfer of aquaculture technology. 	
2.	Does policy include mention of, or provide for, micro-finance?	Not specifically, but the objective of government policy is to provide support to the fishing industry through incentive and credit schemes to develop ancillary industries.	FAO Country Review
3.	Does policy include reducing the number of those engaged in fishing maintaining current numbers, or increasing/maximizing employment?	<p>One policy objective in national policy and development plan is to create employment opportunities (“to enhance the contribution of the fisheries and aquatic resources sector to <i>employment generation</i>, living opportunities and, to make it one of the major contributing sectors to the national economy through marked orientation and increased value addition”).</p> <p>Also, NAQDA policy goals within overall policy context include:</p> <ul style="list-style-type: none"> Generate around 10000 employment opportunities by encouraging large- and medium-scale private sector investments, in various sub-sectors of aquaculture. Out of this, it is expected to generate around 500 direct job opportunities through the proposed co-management programmes as envisaged by the New Fisheries Policy of the Government. 	<p>Fisheries and Ocean Resources Sector Policy and Development Plan (2002)</p> <p>Sydnes, 2003</p>
4.	Does policy include assistance to fishers to leave the fisheries sector or to supplement livelihoods from non-fishing activities?	Yes. Capacity reduction measures appear to have utilized licensing as a reduction measure as well as the introduction of soft loans and credit to encourage alternative livelihoods.	FAO Country Review

Policy Issue/Question		Answer	Supporting Reference
		And policy states that “Steps shall be taken to provide the fishermen engaged in harvesting over-exploited resources with appropriate technology and support, to promote shifting to other diverse fisheries related activities”.	2002 policy
5a.	Does policy refer to food security?	Yes. One of the policy goals is:	Fisheries and Ocean Resources Sector Policy and Development Plan (2002)
5b.	If so, to what extent (if at all) is policy specific about whether fisheries should provide direct food security (i.e. fish being consumed domestically) or indirect food security (fish exported with money then available for food imports).	<ul style="list-style-type: none"> To ensure an increased national per capita availability of fish from the present 17 kg to at least 30 kg and an increased protein intake among the population in 10 years. First main policy objective is “to increase domestic production of fish, while promoting the consumption of fish among the people as a food of high nutritional importance, in order to improve the nutritional status and food security of the population and to optimize the socio-economic objectives of the fisher communities with respect to total net gains for them”.	
Section E: Overall impression of policy trends			
<p>In summary, what are the main <i>trends and changes</i> in fisheries policy over the past 10 years. Please also consider in the response to this question that the seriousness with which a certain policy is pursued can often be measured by the share of the budget allocated to it, or by whether it finds expression in specific legislation or regulations.</p> <p>Communities have been main drivers of community management, while all parties are generally supportive of the Special Area Management process. The main motivations for co-management have been conflicts and resource depletion. But it should be noted that the devolution of power (and the establishment of Provincial Councils) in Sri Lanka was politically driven, largely as an alternative to the demand for a separate state by Tamil political parties, the militant separatist groups, rather than with resource management objectives in mind.</p>			

Thailand

Policy Issue/Question		Answer	Supporting Reference
Section A: Policy Targets/Indicators			
1a.	Does policy contain specific development <i>targets</i> for capture fisheries?	In Thai waters: Attain fisheries production of at least 1.58 million mt/yr from marine capture fisheries. To maintain the level of fishery production not less than 1.7 million tonnes per year. In other waters: To produce fish through fisheries cooperation with foreign countries of at least 1.8 million tonnes per year by employing 3500 Thai fishing vessels larger than 18 metres in length.	FAO TP 488 www.fisheries.go.th
1b.	If so, pls elaborate.		
2a.	Does policy contain specific management <i>targets</i> for capture fisheries? e.g. area under MPAs, etc.?	Rehabilitation of the fisheries resources and environment (some 8.8 million rai of water bodies rehabilitated; 1950 million seedlings restocked); and reduction of bycatch and low value catch by 100000 mt per year to maintain food security and employment for fishers (seasonal closures also in place, but not thought that there are specific targets related to this issue).	FAO TP 488 DoF Policy for 2005
2b.	If so, pls elaborate.		

Policy Issue/Question		Answer	Supporting Reference
3a.	Does policy contain specific development <i>targets</i> for aquaculture?	Increase production by about five percent per year from the current 550000 mt/yr .	FAO TP 488
3b.	If so, pls elaborate.		
4a.	Does policy contain specific management <i>targets</i> for aquaculture?	Yes, see question C4.	DoF Policy for 2005
4b.	If so, pls elaborate.		
5a.	Does policy contain any other specific <i>targets</i> or <i>indicators</i> e.g. value of exports?	Yes. Improve quality assurance and produce for export of at least one million mt per year with an annual growth rate of ten percent (carried over from earlier Plan).	FAO TP 488
5b.	If so, what are they. (List all)	Promotion for and services to at least 30000 fish farmers delivered. In 2006, Thailand has targeted raising its <i>shrimp</i> exports to 450000 tonnes, potentially worth USD2.4 billion. The country's shrimp exports last year are expected to have reached 418000 tonnes, worth a total of USD2 billion, representing year-on-year increases of 7.7 percent in volume and 20 percent in value.	DoF Policy for 2005
6.	Is there a sense in development targets that aquaculture is more, less, or as important as capture fisheries production?	As important.	Above references
Section B: Natural Resource Management			
1.	Does policy include the use of fishery co-management and/or community management?	Yes. Guidelines at the national policy level include: <ul style="list-style-type: none"> • Providing opportunities of people and communities to participate in decision-making, and monitoring and evaluation of public development projects likely to have an impact on natural resources and the environment; and • Providing legal rights of local communities and small-scale fishermen to participate in coastal resource management, as well as the conservation, rehabilitation and maintenance of mangrove forests, sea grass and coral reefs. <p>Within the fisheries sector specifically, the DoF Fishery Policy for 2005 has as one of its mission statements "Rehabilitate fishery resources to retain their productivity through acquiring people's participation by imbuing conscience".</p> <p>And a recent action plan to deal with tsunami rehabilitation also involves co-management, community involvement and enhanced government capacity to respond to needs. Also of note is the Department of Marine and Coastal Resources (DMCR), established within the Ministry of Natural Resources and the Environment in late 2002. The DMCR published a national coastal management policy in 2004, and this formally makes provision for community and co-management.</p>	Macfadyen et al., 2005

Policy Issue/Question		Answer	Supporting Reference
		And the draft New Fisheries Law B.E. 2545 provides for the involvement of stakeholders in decision-making.	
2.	Does fisheries policy (as opposed to national non-sectoral policy) specifically provide for decentralization/devolution of management powers and responsibilities?	Yes. Annual plans developed each year following consultation at local, tambon, district and provincial level. Strong process of decentralization under the Thai constitution.	Policy questionnaire
3a.	Does policy include attempts to expand national offshore fisheries e.g. through the use of larger vessels?	Yes, both in Thai waters and outside...see Section A.	
3b.	If so, is such expansion at the expense of any foreign fishing interests currently operating in the country.		
4.	Does policy encourage the movement of small-scale fisheries into offshore areas, due to resource constraints and technical improvements/efficiencies?	No.	
5a.	Does policy specifically recognize and address any issues of over capacity?	Yes. DoF is “reducing excess fishing vessels (for trawl gear and push nets). Policy includes a boat-tenure system (freezing the trawler number), no transferring license except for the son, license have to continue every year otherwise the license will be cancelled.	FAO TP 488 Fisheries Policy Direction
5b.	If so, what and how.		
6a.	Does policy refer to and/or deal with IUU fishing?	For the IPOA for IUU fishing, the new Fisheries Act improves vessel licensing and registration controls, and places an obligation and responsibility on the fishing vessel owner to comply with third party legislation when fishing in their waters.	FAO TP 488
6b.	If so, in what way.		
7a.	Is policy attempting to introduce user rights to fishers?	Yes. Under the Thai Fisheries Act 1947, rights can be granted to individuals through licences to fish in a “reserved” area, or to individual leaseholders bidding for rights to a “leasable” area who then have total rights to that area for the assigned period.	Thai Fisheries Act 1947 New Fisheries Law B.E. 2545
7b.	If so, how and in what way.	The draft New Fisheries Law B.E. 2545 provides for “designated communities” to have rights to harvest aquatic resources within a designated community fishery area, or to be given the authority to manage and implement measures related to aquatic resources within a designated community fishery area. This is now being done on a pilot basis. Also 2006 document states using rights-based management instead of open access.	FAO TP 488 Fisheries Policy Directions, 2006
8.	Does policy refer to need for integration/coordination with other sectoral policies?	Policy documents not thought to, but DoF has decentralized some authorities to other sectoral authorities, and to local authorities.	Supongpa, Pers. Comm., 2006
9.	Does policy mention ecosystems management?	Policy not thought to, although efforts are ongoing in terms of habitat and fishing ground rehabilitation, and installation of artificial reefs.	Supongpa, Pers. Comm., 2006
9b.	If so, what measures are suggested.		

Policy Issue/Question		Answer	Supporting Reference
10.	Does policy include the use of MPAs?	Yes. Spatial restrictions include MPAs, nursery area closures, no-take zones, marine reserves and other temporary closures of areas.	FAO TP 488
11a.	Does policy include specific measures related to conflict management?	<p>Yes. Zoning. Three major areas have been identified:</p> <ul style="list-style-type: none"> • Fishing grounds from 0 to 3 nautical miles (5556 metres) from shore to be managed by Tambon Administrative Office; • Fishing grounds from 3 to 6 nautical miles (1112 metres) from shore to be managed by the Provincial Administrative Office; • Fishing grounds 6 nautical miles or more from shore to be managed by Fisheries Department. <p>Owing to the different continental shelf's characteristics, the above zoning criterion may be applicable only to shallow seas. Where the continental shelf is steep, smaller distance from shore will be determined.</p> <p>Anchovy fishery in Songhla...small-scale fishery protests led to increase in mesh size in light purse seine fishery and also to zoning.</p> <p>Thailand's Ocean Policy focuses on the need to address multiple use conflicts.</p>	FAO TP 488
11b.	If so, what are they.		
Section C: Financial/economic and marketing issues			
1a.	Does policy provide for the provision of subsidies?	<p>The Board of Investment (BOI) has a long list of priority activities and fish products for investment promotion. There is a subsidy scheme to assist small-scale fishers who operate with smaller vessels. The government also provides subsidized credit and price support for the tuna fishers. There is a special interest credit scheme for target fishers to buy and renovate boats, fishing gear, cages and ponds at a lower than market rate of interest (9 percent).</p> <p>Also fuel subsidy.</p>	ADB-RETA 5945 Project Website, WorldFish Center
1b.	What are the main form of "good" subsidies provided?		
1c.	If so, what are the main forms of "bad" subsidy provided and what is their time frame. (pls use your own judgment to decide whether subsidies (e.g. training, social support, boat building, fuel, etc.) are good or bad)		
2.	Is there an overall thrust/trend towards reducing or increasing the level of subsidy provided?	Policy document itself not specific on the issue.	
3.	Does policy include increasing attempts to introduce user payments e.g. charges imposed on the fishing industry?	Basically no. Although revision of licence fees could be considered as doing so.	FAO TP 488
4.	Does fisheries policy include mention of the need to support the traceability and/or certification of products?	<ul style="list-style-type: none"> • Inspection of 100000 product samples performed. • 30000 farms certified. • 266 factories certified. • 10 m rai of farmland certified. <p>Also a hatchery certification scheme.</p> <p>Through the food-traceability project set up with collaboration of government ministries, two major shrimp manufacturers have been working on a pilot</p>	DoF Policy for 2005 www.shrimpnews.com

	Policy Issue/Question	Answer	Supporting Reference
		<p>project to make it possible for consumers to check the origin of shrimp products using traceability software together with RFID (radio frequency identification) technology. The two pioneers are Chanthaburi Frozen Food Co., Ltd. and Charoen Pokphand Foods Public Company Limited, agro-industrial and food conglomerates in Thailand. The traceability project has been formed by the Agriculture and Cooperatives Ministry and the Science and Technology Ministry with support from related organizations such as the Fishery Department and the National Electronics and Computer Technology Centre (NECTEC).</p> <p>Since 2000, DoF has put much more emphasis on quality-production of aquaculture rather than on quantity production concerns. DoF together with Thai aquaculture industry has developed and implemented two kinds of standard as Code of Conduct (CoC) and Good Aquaculture Practice (GAP).</p> <p>Traceability has been promoted to use since the past 5 years starting with manual traceability mainly for shrimp production using “movement document or MD”. It has been required for the production chain from hatchery to farm and farm to processing plant (via shrimp distributor, if necessary). And now DoF has initiated computerized traceability system called TraceShrimp to be used in the whole supply chain for shrimp industry including feed manufacturer, hatchery, farm, shrimp distributor, processor, trader-exporter and importer.</p>	Fisheries Policy Directions, 2006
5a. 5b.	Does policy refer to increasing value-added? If so, how is this to be achieved.	Yes. Promote small business for local fishery products, ready to eat product and promote One Tambon One Product (OTOP).	Fisheries Policy Directions, 2006
6.	Does policy refer to tariff barriers and/or free trade areas in the region?	Not specifically. National government policy on FTA.	
7.	Does policy seek to increase exports?	<p>Yes. Overall fisheries management objectives, as presented by the Minister when detailing the restructuring of the Department in late 2002 included:</p> <ul style="list-style-type: none"> • earning of foreign exchange through the use of responsible fisheries practices. <p>And see targets on exports in Section A.</p> <p>Creation of the National Agency for Export Development (BPEN) under the Ministry of Trade, Joint action with private sector against US anti-dumping case, and filing of complaint with WTO, lobbying EU on GSP tariff rate post tsunami.</p>	FAO TP 488

Policy Issue/Question		Answer	Supporting Reference
8a.	Are there any specific policy initiatives to improve the efficiency of fisheries administrations? e.g. public/private partnerships	Not specifically mentioned in policy, but activities ongoing to do so.	Supongpa, Pers. Comm., 2006
8b.	If so, pls elaborate.		
Section D: Socio-economic and poverty issues			
1a.	Does policy refer to issues of poverty?	Yes, section in 2006 documents on social issues, and ongoing activities targeting poverty reduction. Activities include: Promote small business for local fishery products, ready to eat product and promote One Tambon One Product (OTOP); Program for alternative job training in practice and on the success site visit; Promote fisher group revolving fund to phase out loan and secure for their livelihoods; Promote fisher group co-op shop for cheaper essential daily needs; Promote fisher wives as housewife groups to do small business on fishery or agriculture products.	Supongpa, Pers. Comm., 2006 and Fisheries Policy Directions, 2006
1b.	If so, in what capacity e.g. references to PRSPs, non-fisheries sector poverty reduction strategies, etc.		
2.	Does policy include mention of, or provide for, micro-finance?	Not specifically. But DoF has provided seed funding in the past for fisher groups as revolving fund.	
3.	Does policy include reducing the number of those engaged in fishing maintaining current numbers, or increasing/maximizing employment?	Increasing. Overall fisheries management objectives, as presented by the Minister when detailing the restructuring of the Department in late 2002 included: <ul style="list-style-type: none"> improved livelihood to increase employment 	FAO TP 488
4.	Does policy include assistance to fishers to leave the fisheries sector or to supplement livelihoods from non-fishing activities?	Yes. See Section D1 above.	Fisheries Policy Directions, 2006
5a.	Does policy refer to food security?	Yes. Overall fisheries management objectives, as presented by the Minister when detailing the restructuring of the Department in late 2002 included: <ul style="list-style-type: none"> sustained fisheries for food security; improved livelihood to increase employment; and earning of foreign exchange through the use of responsible fisheries practices. 	FAO TP 488
5b.	If so, to what extent (if at all) is policy specific about whether fisheries should provide direct food security (i.e. fish being consumed domestically) or indirect food security (fish exported with money then available for food imports).		
Section E: Overall impression of policy trends			
<p>In summary, what are the main <i>trends and changes</i> in fisheries policy over the past 10 years. Please also consider in the response to this question that the seriousness with which a certain policy is pursued can often be measured by the share of the budget allocated to it, or by whether it finds expression in specific legislation or regulations.</p> <p>Recent policy changes have focused around (Fisheries Policy Directions, 2006):</p> <ul style="list-style-type: none"> Quality and safety aquaculture production; Environmental-friendly aquaculture operation; The right-base fisheries management for coastal and marine fisheries is also promoted to replace open access will be gradually implemented; The fishing capacity reduction programme for the Gulf of Thailand that harmonized with the global initiative is now under development and hoped to be implemented in the next few years; Food safety; Information and labeling of products; Emphasis on trade promotion; A variety of sustainable development initiatives; and Greater emphasis on social issues and socio-economics. 			

Viet Nam

Policy Issue/Question		Answer	Supporting Reference
Section A: Policy Targets/Indicators			
1a.	Does policy contain specific development <i>targets</i> for capture fisheries?	Yes. By 2010, total marine fisheries catch target is 1500000-1800000 tonnes (Tonkin Gulf: 270000 tonnes; Central Region: 370000 tonnes; South Eastern: 710000 tonnes; South Western: 200000 tonnes, and International water: 250000 tonnes). There is a sense to reduce coastal fishing catch and increase offshore fishing catch.	Decision 10/2006/QD-TTg
1b.	If so, pls elaborate.		
2a.	Does policy contain specific management <i>targets</i> for capture fisheries? e.g. area under MPAs, etc.	Yes. By 2010, complete the development of a comprehensive coastal fisheries management. By 2015, to have a Network of 15 Marine Protected Areas in Viet Nam. By now, some of them have been constructed at Hon Mun, Cua Lo Cham...	
2b.	If so, pls elaborate.		
3a.	Does policy contain specific development <i>targets</i> for aquaculture?	The country aimed to increase its aquaculture output to 1.5 m tonnes and its aquaculture acreage to 980000 hectares (ha) in 2006. Meanwhile, in 2010, Viet Nam is looking at an increase for both the figures to 2.1 m tonnes and to 1.1 m ha respectively. Yes. The country has aimed to increase its aquaculture output to 1448000 tonnes and its aquaculture acreage to 980000 hectares (ha) in 2006. Meanwhile, in 2010, Viet Nam is looking at an increase for both the figures to 2000000 tonnes (fresh water: 980000 tonnes; marine and brackish water: 1020000 tonnes) and to 1.1-1.4 m ha respectively.	Thanh Nien Daily, 3 July 2006
3b.	If so, pls elaborate.		MOFI Annual Report 2006 Decision 10/2006/QD-TTg
4a.	Does policy contain specific management <i>targets</i> for aquaculture?	Increasing amounts of ha under organic farming	
4b.	If so, pls elaborate.		
5a.	Does policy contain any other specific <i>targets</i> or <i>indicators</i> e.g. value of exports?	Yes. In 2006, the nation is planning to achieve US\$ 2.8 billion of seafood export turnovers compared with US\$ 2.7 billion in 2005. By 2010: 4 billion USD/891000 tonnes processed products. By 2010: Processing capacity of fisheries industry 3500-4000 tonnes/day . By 2010 the number of labourers in fisheries: 4.7 million.	MOFI Annual Report 2006 Decision 10/2006/QD-TTg
5b.	If so, what are they. (List all)		
6.	Is there a sense in development targets that aquaculture is more, less, or as important as capture fisheries production?	Yes. There is a sense in development targets that aquaculture is more important than capture fisheries.	Pers. Comm. Pham Trong Yen
Section B: Natural Resource Management			
1.	Does policy include the use of fishery co-management and/or community management?	Yes. The Fisheries Law of 2003 provides for co-management. Regarding the management of fishing grounds, the law provides that "The provincial People's Committees (...) shall organize and promote the local residents to take part in	Fisheries Law of 2003, Article 15.3

Policy Issue/Question		Answer	Supporting Reference
		monitoring, detection and prosecution of any violations committed to fisheries activities in fishing grounds”.	
2.	Does fisheries policy (as opposed to national non-sectoral policy) specifically provide for decentralization/devolution of management powers and responsibilities?	Yes. The Fisheries Law of 2003 also deals with decentralization, and provides that “The Government shall identify the border of coastal areas in order to decentralize management to local coastal authorities for integrated coastal areas management” (Article 5.4). With regard to inland areas, it stipulates that “The Government shall plan, establish, manage and decentralize the inland protected areas” (Article 9.2). It further specifies that “Provincial People’s Committee shall issue the management rule of protected areas to be decentralized to the local authorities for management in accordance with guidance provided by the Ministry of Fisheries”.	Fisheries Law of 2003, Article 5.4 & 9.2
3a. 3b.	Does policy include attempts to expand national offshore fisheries e.g. through the use of larger vessels? If so, is such expansion at the expense of any foreign fishing interests currently operating in the country.	Yes, First, to further expand marine fish production for domestic consumption and for export; and secondly to reduce the pressure on coastal fisheries resources which have shown signs of full exploitation and even severe over fishing in some areas. Offshore fisheries have been strongly promoted by the Government since 1997. While the north (Tonkin Gulf) and west (Gulf of Thailand) fisheries appear to be overexploited, the grounds in the east and south are becoming increasingly exploited and could have some scope to support additional fishing effort. However, few data are available on the resource or optimal sustainable yield.	Decision 393/TTg of 1997 WB Report on VN Fisheries
4.	Does policy encourage the movement of small-scale fisheries into offshore areas, due to resource constraints and technical improvements/efficiencies?	Yes, more than 5000 fishing boats with capacity of more than 90 HP built by fishermen while only about 1200 ones were built from Government Programme since 1997 up to now.	
5a. 5b.	Does policy specifically recognize and address any issues of over capacity? If so, what and how.	Yes. The Ministry of Fisheries is planning to protect the coastal marine resources from depleting the number of small fishing boats and vessels by 2010 to 50000 tonnes. (capacity of more than 70 HP: 6000 vessels; 46-75 HP: 14000 vessels; 21-45 HP: 20000 boats; less than 20 HP: 10000 boats).	Decision 10/2006/QD-TTg
6a. 6b.	Does policy refer to and/or deal with IUU fishing? If so, in what way.	Yes. More propaganda, more control and create new livelihood for fishermen.	Pers. Comm. Pham Trong Yen
7a. 7b.	Is policy attempting to introduce user rights to fishers? If so, how and in what way.	No information available at the moment.	Pers. Comm. Pham Trong Yen
8.	Does policy refer to need for integration/coordination with other sectoral policies?	Yes. Ex: There is close co-ordination with MARD and MONRO to protect water resources and mangrove forest for development aquaculture.	Pers. Comm. Pham Trong Yen

Policy Issue/Question		Answer	Supporting Reference
		Coordination with Ministry of Science and Technology, Ministry of Public Health for ensuring safety of seafood products.	
9.	Does policy mention ecosystems management?	Not clear.	Pers. Comm. Pham Trong Yen
9b.	If so, what measures are suggested.		
10.	Does policy include the use of MPAs?	Yes, see a2.	a2 above
11a.	Does policy include specific measures related to conflict management?	No information available officially at the moment. But the Ministry of Fisheries is reported to be drafting a decree (regulation) that includes provisions regarding the demarcation of marine areas and coastal, inshore and offshore fishing routes, as well as a provision regarding size, type and marking of fishing vessels operating in fishing routes.	Pers. Comm. Pham Trong Yen 2005 Strategy
11b.	If so, what are they.		
Section C: Financial/economic and marketing issues			
1a.	Does policy provide for the provision of subsidies?	Yes. The number of vessels over 90 HP has increased, as regulated in the decision 393/TTg of 1997 which supported the construction of vessels and their sale to fishers at subsidized interest rates. This programme has had some positive impacts, e.g., through pioneering the offshore fishery in some ports such as Phan Thiet. However, the subsidized vessels have experienced a high failure rate, and only about 10 percent of the 1300 vessels funded under the programme are meeting their scheduled repayment despite a reduction of the interest rate from 7 to 5.4 percent in 2003. Decision 358 TTg of May 1997 defined the priority to be given to offshore fishing and established a five-year tax holiday for all offshore vessels (e.g., the 3 percent natural resources tax). Decision 178 of September 1998 supported the provision of export credits to processors.	R. Zweig et al., World Bank Report Decision 393/TTg of 1997 Decision 358 TTg of May 1997 Decision 178 of September 1998
1b.	What are the main form of “good” subsidies provided?		
1c.	If so, what are the main forms of “bad” subsidy provided and what is their time frame. (pls use your own judgment to decide whether subsidies (e.g. training, social support, boat building, fuel, etc.) are good or bad)		
2.	Is there an overall thrust/trend towards reducing or increasing the level of subsidy provided?	There is a sense of trend towards reducing the level of subsidy provided. Fishermen now suffer from increasing oil price but no subsidy.	Pers. Comm. Pham Trong Yen
3.	Does policy include increasing attempts to introduce user payments e.g. charges imposed on the fishing industry?	No.	Pers. Comm. Pham Trong Yen
4.	Does fisheries policy include mention of the need to support the traceability and/or certification of products?	Yes. Farms must ensure all necessary data are recorded for identification and traceability of the fish stock and feed supply from the hatchery to the factory. Processing factories must ensure all necessary data recorded for identification and traceability of the fish batch. Documentation of ingredients used for every lot of feed supplied must to be maintained by producer. All along the cycle, fish must be identifiable to a batch with treatments records and other attached. Traceability of harvest must be maintained up to processing factory. It is	Policy poster

Policy Issue/Question		Answer	Supporting Reference
		<p>expected to control the quality and safety of food for the whole production chain “from pond to table”.</p> <p>Also, growth in organic farming.</p>	
5a. 5b.	<p>Does policy refer to increasing value-added?</p> <p>If so, how is this to be achieved.</p>	Yes by highlighting lack of value-added, and by including specific projects to increase post-harvest quality and diversifying products exported.	Programme development of seafood export. (Decision 251/1998/QD-TTg of December 1998)
6.	Does policy refer to tariff barriers and/or free trade areas in the region?	No information available officially at the moment.	Pers. Comm. Pham Trong Yen
7.	Does policy seek to increase exports?	Yes. Target for 2010: 4 billion USD.	Decision 10/2006/QD-TTg
8a. 8b.	<p>Are there any specific policy initiatives to improve the efficiency of fisheries administrations? e.g. public/private partnerships</p> <p>If so, pls elaborate.</p>	Since 1986, the Government has emphasized development of the market economy under the Doi Moi (renovation) policy. The equitization of state-own enterprises in fisheries is successful and would be ended in 1-2 years.	World Bank Report
Section D: Socio-economic and poverty issues			
1a. 1b.	<p>Does policy refer to issues of poverty?</p> <p>If so, in what capacity e.g. references to PRSPs, non-fisheries sector poverty reduction strategies, etc.</p>	<p>Yes. Two major policy goals are:</p> <p>To enhance the living standards of fishing communities that depend on coastal fisheries resources, to contribute to poverty alleviation within those communities and to assure food security, and</p> <p>To enhance income, create new occupations and improve the living standards of fishing communities.</p>	Decision 10/2006/QD-TTg
2.	Does policy include mention of, or provide for, micro-finance?	Not information available officially at the moment.	Pers. Comm. Pham Trong Yen
3.	Does policy include reducing the number of those engaged in fishing maintaining current numbers, or increasing/maximizing employment?	<p>Yes. There is a sense of reducing the number of coastal fishing vessels and total horsepower to that needed to take the corresponding total allowable catch of the coastal resources and to adjust the occupation structure of fishing communities accordingly.</p> <p>To maintain employment of 500000 in fisheries catching by 2010.</p>	<p>Pers. Comm. Pham Trong Yen</p> <p>Decision 10/2006/QD-TTg</p>
4.	Does policy include assistance to fishers to leave the fisheries sector or to supplement livelihoods from non-fishing activities?	Yes. There is a trend of transferring the appropriate number of coastal fishing participants (in accordance with achieving sustainable exploitation of coastal fisheries resources) to other occupations, including implementing supporting programmes of technical re-training, occupational counseling.	Pers. Comm. Pham Trong Yen
5a. 5b.	<p>Does policy refer to food security?</p> <p>If so, to what extent (if at all) is policy specific about whether fisheries should provide direct food security (i.e. fish being consumed domestically) or indirect food security (fish exported with money then available for food imports).</p>	<p>Food security is specifically included in policy as a development goal.</p> <p>Not specific to direct or indirect.</p>	

Policy Issue/Question	Answer	Supporting Reference
Section E: Overall impression of policy trends		
<p>In summary, what are the main <i>trends and changes</i> in fisheries policy over the past 10 years. Please also consider in the response to this question that the seriousness with which a certain policy is pursued can often be measured by the share of the budget allocated to it, or by whether it finds expression in specific legislation or regulations.</p> <p>The law of fisheries (2003): highest legislation regulating activities of Viet Nam fisheries. Decision 10/2006/QD-TTg (January 2006) shows main targets of fisheries sector to 2010.</p> <p>Fisheries sector has developed fast. Protection coastal resources have been paid attention: Government was promoting Programme of building high-capacity boats for offshore catching and developing aquaculture in coastal areas to create livelihood for fishermen. There was a sense of that aquaculture was developing faster than catching. Freshwater aquaculture took a leading role with the growth of catfish production (almost 400000 tonnes in 2005). Investment in fisheries increasing during 5 years and in the coming period. Decision 131/2004/QD-TTg (July 2004) on approval of Programme of Protection and Development of fisheries resources to 2010.</p> <p>Also note recent emphasis on safety. Decree 66/2005/ND-CP (April 2005) on safety for fishermen and fishing boats at sea; Directive 22/2006/CT-TTg (June 2006), states that municipal and provincial people’s committees, ministries and agencies are responsible for the good governance and inspection of fishing vessels and crew to ensure the use of all safety and communications equipment. Local agencies are required to organize their fishing fleets in teams and groups and to monitor offshore fishing and develop disaster preparedness schemes in the event of an emergency. The PM asked the Ministry of Fisheries to lead localities to further control the registration of fishing vessels to ensure offshore fishing boats are equipped with at least a 90 HP engine.</p> <p>(Some policies have been now suggested (as some issue in “Draft 2005 Strategy”) but they have been not approved officially by Viet Nam Government and other Governmental bodies. They should not be considered as policies of fisheries sector until approved).</p>		

Summary of individual table responses

In the table overleaf, a summary analysis is provided. In interpreting the table, the following points should be noted:

1. A figure ‘1’ in the table indicates that policy contains a specific reference to the issue under consideration, and the question posed in the table template on page 29;
2. A figure ‘0’ in the table indicates that policy is not thought to contain a specific reference to the issue under consideration. A figure ‘0’ has been used in cases where policy documents may imply an issue might be included, but are not specific about its inclusion. For example, if policy refers to ‘credit’, but not specifically to ‘micro-finance’, a figure ‘0’ has been used. And as noted above, a figure ‘0’ does not necessarily mean that a country is not involved with concrete implementation activities related to the issue concerned;
3. Where it has not been possible to ascertain whether policy does, or does not, contain specific reference to a particular issue, the corresponding cell has been left blank. The column titled “Total Responses” therefore represents the number of columns with either a ‘1’ or a ‘0’ in them;
4. The furthestmost right-hand column titled “% of total responses” represents the total number of ‘1’s in each row divided by the total number of responses; and
5. For each of the four sections A-D in the table, rows have been ranked/sorted by “% of total responses” in descending order, to provide an idea of where there is most consistency between policy in different countries in terms of policy including references to specific issues.

Country/Issue included in Policy	Bangladesh	Cambodia	China	India	Indonesia	Japan	Malaysia	Myanmar	Pakistan	Philippines	Rep. of Korea	Sri Lanka	Thailand	Viet Nam	Total	Total Responses	% of Total Responses
A. Targets																	
Aquaculture development targets	0	0	1	1	1	1	1	1	1	1		1	1	1	11	13	85%
Capture development targets	0	0	1	1	1	1	1	1	1	1	0	1	1	1	11	14	79%
Other targets	0	1	0	1	1	1	1	1	1	0	1	1	1	1	11	14	79%
Capture management targets	0	1	0	1	0	1			1	0	1	0	1	1	7	12	58%
Aquaculture growth greater than capture	1	0	0	0	1	0	0	1	1	1	1	1	0	1	8	14	57%
Aquaculture management targets	0	0	0	1	0	0	1		1	0	1	0	1	1	6	13	46%
B. Natural Resource Management																	
IUU	1	1	1	1	1	1	1	1	1	1	1	1	1	1	14	14	100%
MPAs, fish sanctuaries, fish refuges	1	1	1	1	1	1	1	1	1	1	1	1	1	1	14	14	100%
Community/co-mgt	1	1	0	1	1	1	1		1	1	1	1	1	1	12	13	92%
Fleet capacity reduction	1	0	1	1	1	1	1	1	1	0	1	1	1	1	12	14	86%
Decentralization	0	1	1	1	1	1	0		1	1	1	1	1	1	11	13	85%
Offshore expansion	1	0	1	1	0	0	1	1	1	1	1	1	1	1	11	14	79%
Conflict management	0	1	1	1	1	1	0	1	1	0		1	1	0	10	13	77%
Cross-sectoral coordination	1	1	1	1	1	0			1	0	1	1	0	1	9	12	75%
Ecosystems	0	0	1	1	1	1	1		1	1	1	1	0	0	9	13	69%
Increasing user rights	1	1	1	0		1			0	1	1	0	1	0	7	11	64%
Offshore at expense of foreign		0		1	0	0	1	1	0	1			1		4	8	50%
Small-scale moving offshore	1	0	0	1	0	0	1		1	0		1	0	1	6	12	50%
C. Financial/economic and marketing																	
Export increases	1	1		1	1	1	1	1	1	1	1	1	1	1	13	13	100%
Administrational improvements	1	1	1	0		1	1	1	1	1	1	1		1	11	12	92%
Subsidies to be provided	1	0	1	1	0	1	1	1	1	1	1	1	1	1	12	14	86%
Traceability/certification	1	0	1	1		1	1		1	1	1	0	1	1	10	12	83%
Value-added	1	0	1	0	1	1	1		1	1	1	1		1	10	12	83%
Subsidies to be reduced or rationalized	0		0	1		1	1	0	0	1	0	1	0	1	6	12	50%
User charges increased	0	0	1	0	0	0	0	1	1	1	0	0	0	0	4	14	29%
Tariff barriers	0	0	0	0					1	0		0	0	0	1	9	11%
D. Socio-economic and poverty																	
Food security	1	1	1	1	1	1	1	1	1	1	0	1	1	1	13	14	93%
Alternative livelihoods	1	1	1	0	0	1	1		1	1	1	1	1	1	11	13	85%
Poverty	1	1		0	1	0	1	1	1	1	0	1	1	1	10	13	77%
Employment increases	1	1	0	0	1	1	0	1		1		1	1	0	8	12	67%
Micro-finance	0	1	0	0	0	1	1		1	0		0	0	0	4	12	33%