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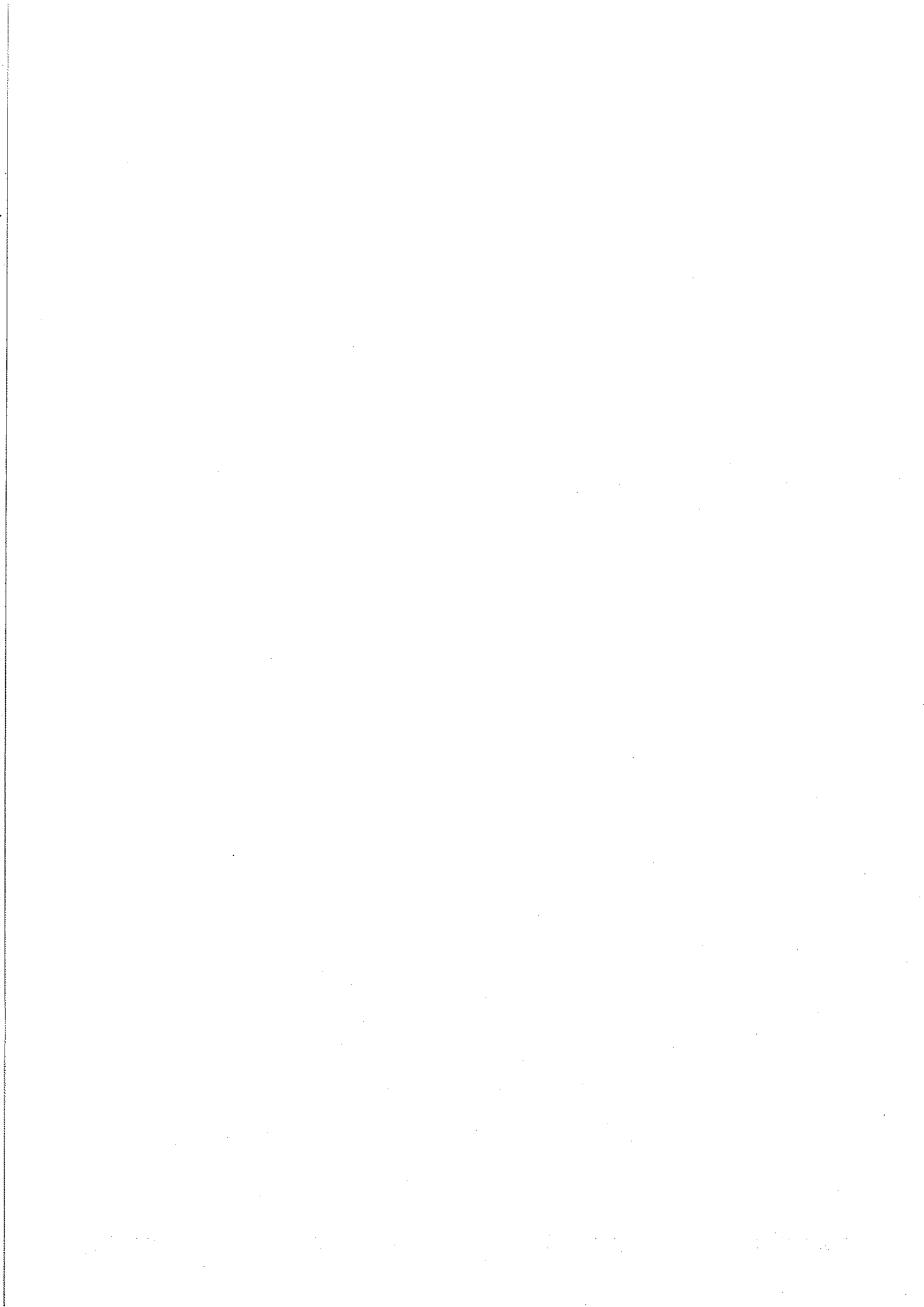
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Vedlagt følger evalueringsrapport om Guinea Bissau. Rapporten er tidligere oversendt til Folketingets Europaudvalg i en version til fortrolig orientering. Imidlertid har Kommissionen nu besluttet, at rapporten kan gøres offentligt tilgængelig. Den vedhæftede rapport er dermed nu offentligt tilgængelig.

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THE EUROPEAN UNION**

**Brussels, 29 June 2011  
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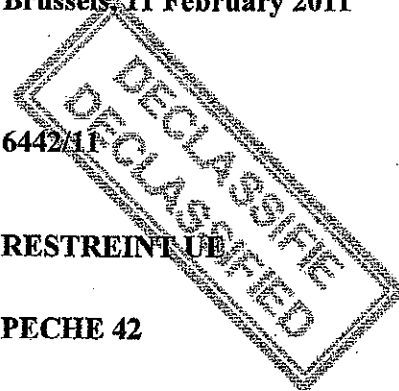
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**Brussels, 11 February 2011**

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## **COVER NOTE**

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**From :** European Commission

**To :** General Secretariat of the Council

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**Subject :** Specific Convention n° 27: Ex-post evaluation of the current Protocol to the Fisheries Partnership Agreement between the European Union and Guinea Bissau and analysis of the impact of the future Protocol on sustainability

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**MEGAPESCA Lda**

**CONTRAT CADRE FISH/2006/20**  
**SPECIFIC CONVENTION N°27: EX-POST EVALUATION OF**  
**THE CURRENT PROTOCOL TO THE FISHERIES**  
**PARTNERSHIP AGREEMENT BETWEEN THE EUROPEAN**  
**UNION AND GUINEA BISSAU AND ANALYSIS OF THE**  
**IMPACT OF THE FUTURE PROTOCOL ON SUSTAINABILITY**

**Final Report**  
**September 2010**

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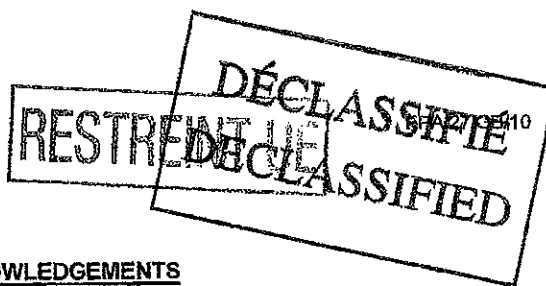
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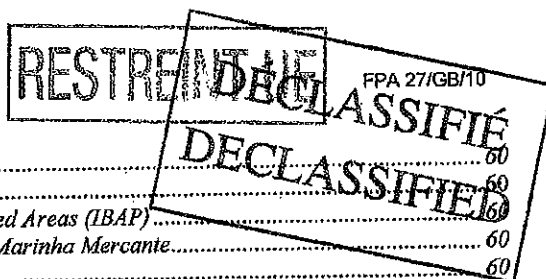
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Average exchange rates used (source: InforEuro)

Year	Euro	USD	CFA Franc
2006	1	1.25	655.957
2007	1	1.37	655.957
2008	1	1.48	655.957
2009	1	1.39	655.957
2010	1	1.33	655.957

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## Abbreviations and Acronyms

ACP	African, Caribbean and Pacific States (Lomé Convention IV)
AECID	Spanish Development Agency
AFD	French Development Agency
AFR	Artisanal Fisheries Regulation
AfDB	African Development Bank
AGPAO	Support for Fisheries Management in West Africa
AIS	Automatic Identification System
ANP	National Popular Assembly
APGB	Administração dos Portos da Guiné Bissau
AU	African Union
BCEAO	Banque Centrale des Etats de l'Afrique de l'Ouest
BOAD	Banque Ouest Africaine De Developpement
CCAMLR	Commission for the Conservation of Antarctic Marine Living Resources
CCLME	Canary Current Large Marine Ecosystem
CECAF	Fishery Committee for the Eastern Central Atlantic (=COPACE en Français)
CEFOPE	Centre for Fisheries Training
CEMAC	Communauté Economique et Monétaire de l'Afrique Centrale
CET	Common external tariff
CFP	Common Fisheries Policy
CIPA	Centre for Fisheries and Aquaculture Research
CNFC	China National Fishery Corporation
CNHSB	Centre National des Sciences Halieutiques de Boussoira
COMHAFAT	Conférence Ministérielle sur la Coopération entre les Etats Africains Riverains de l'Océan Atlantique
CONAPEMAC	Marine Fisheries National Cooperation of the Peoples Republic of China
COREP	Regional Fisheries Committee for the Gulf of Guinea
CPLP	Community of Portuguese Speaking Countries
CPUE	Catch per Unit Effort
CSRP	Sub-Regional Fisheries Commission
CZM	Coastal Zone Management
DENARP	National Poverty Reduction Strategy Paper
DEU	Delegation of the European Union
DGP	Direcção Geral das Pescas
DGIS	Netherlands support
DGPI	Directorate General of Industrial Fisheries
DG SANCO	Directorate General for Health and Consumer Affairs, European Commission
EBA	Everything But Arms
EC	European Commission
ECCAS	Economic Community of Central African States
ECF	Extended Credit Facility
ECOWAS	Economic Community Of West African States
ECPA	Emergency and Post-Conflict Assistance
EDF	European Development Fund
EEZ	European Economic Zone
EIB	European Investment Bank
EIU	Economist Intelligence Unit
ENRP	Estratégia Nacional de Redução da Probreza
EPA	Economic Partnership Agreement
EPADP	West Africa EPA Development Programme
EPCA	Emergency Post-Conflict Support Programme
ETLS	ECOWAS Trade Liberalization Scheme
EU	European Union
EUR	Euro
FADs	Fish aggregating devices
FAO	Food and Agriculture Organization

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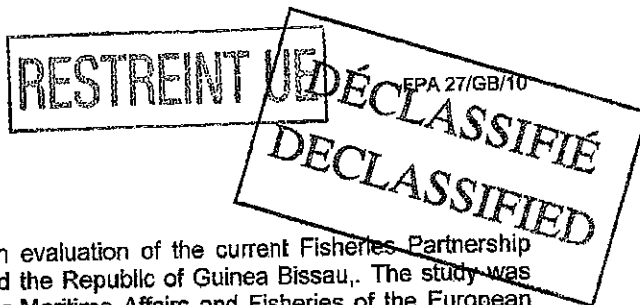
FIBA	United Nations Food and Agriculture Organization Fisheries Department.
FISCAP	Fisheries Monitoring and Control Institution
FMP	Fisheries management plan
FOC	Flags of Convenience
FPA	Fisheries Partnership Agreement
GDP	Gross Domestic Product
GEF	Global Environment Facility
GRT	Gross Registered tonnage
GSP	Generalised System of Preferences
GTZ	German International cooperation Agency
HACCP	Hazard Analysis and Critical Control Points
HIPC	Heavily Indebted Poor Countries
IBAP	Instituto da Biodiversidade e das Áreas Protegidas
ICCAT	International Commission for the Conservations of Atlantic Tunas
IEO	Instituto Español de Oceanografía
IFAD	International Fund for Agricultural Development
ILO	International Labour Organisation
IMF	International Monetary Fund
IMO	International Maritime Organisation
IMROP	Institute for Oceanographic Research and Fisheries
IT	Information Technology
IUCN	International Union for Conservation of Nature
IUU	Illegal, unreported and unregulated
JICA	Japenses International Cooperation Agency
LDC	Least Developed Countries
LJFL	Lower-jaw fork length
MARPOL	Marine Pollution
MAVA	Luc Hoffmann Foundation
MCS	Monitoring Control and Surveillance
MDGs	Millennium development goals
MDRI	Multilateral Debt Relief Initiative
MFN	Most Favoured Nation
MoU	Memorandum of Understanding
MPA	Marine Protected Area
MSc	Master of Science
MSY	Maximum Sustainable Yield
NAO	National Authorising Officer
NAUTA	Spanish Regional Program of Development of the Fishery Sector in Africa
NGO	Non Governmental Organisation
NIP	National Indicative Programme
ODA	Overseas Development Administration (UK)
OFCF	Overseas Fishery Cooperation Foundation of Japan
OGÉ	General State Budget
P&L	Pole and Line
PAPED	West Africa EPA Development Programme
PALOPs.	Países De Língua Oficial Portuguesa (Countries having their official language as Portuguese)
PRCM	Programme Régional de Conservation de la zone Côtière
PRAO	Projet Regional des Pêches en Afrique de l' Ouest
PRGF	Poverty reduction and growth facility
PRS	Social Renovation Party
PRSP	Poverty Reduction Strategy Paper
RAO	Regional Authorising Officer
RFB	Regional Fisheries Body
RFMOs	Regional Fisheries Management Organisations
RIP	Regional Indicative Programme
SCRS	Standing Committee on Research and Statistics (ICCAT)
SOLAS	Convention for the Safety of Life at Sea



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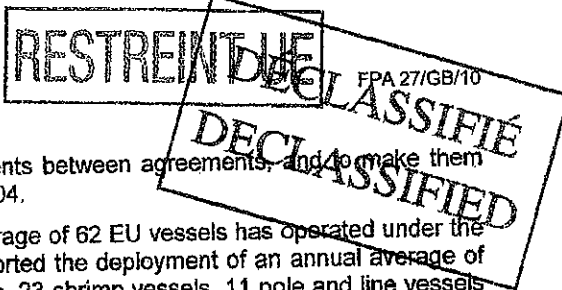
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SLL	Surface Long Liner
SRFC	Sub-Regional Fisheries Commission
STCW	International Convention on Standards of Training, Certification, and Watchkeeping for Seafarers
STECF	Scientific, Technical and Economic Committee for Fisheries
TAC	Total Allowable Catch
TBT	Technical Barriers to Trade
TED	Turtle Exclusion Device
TDCA	Trade Development and Cooperation Agreement
UCOS	United States Marine Corps
UEMOA	Union Economique et Monétaire Ouest Africaine
IUCN	International Union for Conservation of Nature
UN	United Nations
UNDP	UN Development Programme
USAID	United States Agency for International Development
USD	United States Dollars
VA	Value Added
VMS	Vessel Monitoring System
WTO	World Trade Organisation
WWF	World Wildlife Fund



## EXECUTIVE SUMMARY

1. This report sets out the findings of an evaluation of the current Fisheries Partnership Agreement between the European Union and the Republic of Guinea Bissau. The study was commissioned by the Directorate General for Maritime Affairs and Fisheries of the European Commission and conducted by a consortium comprising Oceanic Développement (France) and Megapesca Lda (Portugal). The mission comprised a review of documentation associated with the first protocol and activities conducted under it, and meetings with key stakeholders, including representatives of the Government of Guinea Bissau and its fishery sector during a field mission to Guinea Bissau conducted in August 2010.
2. Guinea Bissau is a tropical West African country with limited natural resources. The population of the country is estimated at 1.4 million, about a quarter of which resides in the capital Bissau, with the rest in rural areas. Guinea Bissau is one of the least developed countries. About two-thirds of households live below the poverty line; the literacy rate is low. The country would qualify for debt relief as a highly indebted developing country, but so far has not been able to implement adequate reforms to the satisfaction of the IMF. A National Poverty Reduction Strategy Paper (DENARP) is in place. The economy is largely agricultural, with a high dependency on the export of a single crop, cashew, which earned USD 94 million in 2008. Investment has shrunk over the years. It is one of the most difficult places to do business (ranking 181 out of 183 countries in the World Bank annual survey). Potentially beneficial trade with the EU in fishery products is prevented due to non-compliance with EU sanitary measures.
3. The country is highly dependent on donor support, which provided 31% of national income in 2008. The EU is the major donor, providing about one third of the international donor assistance (of about EUR 100 million) in 2008. Other important donors are the World Bank, Spain and Portugal. Government revenues in 2008 were just EUR 76 million, about a third of which is budgetary support from donors, principally the EU.
4. As with other ACP states, Guinea Bissau's development cooperation strategy with the EU is set out in a National Indicative Programme. The programme under the 10<sup>th</sup> EDF was adopted by the parties for the period 2008 to 2013 and is designed to support the DENARP, and the achievement of the Millennium Development Goals (MDGs). The NIP allocates EUR 53 million to two focal sectors conflict prevention and water and energy. Additional direct budgetary support amounts to €32 million during the period 2008 to 2011, the main purpose of which is to achieve macro-economic stability. Guinea Bissau is also a beneficiary of interventions supported under the 10<sup>th</sup> EDF Regional Indicative Programme for Africa. The total EDF allocation to the RIP is EUR 597 million. Guinea Bissau has elected to participate with the UEMOA Group in negotiations with the EU to replace the tariff preferences currently offered unilaterally by the EU to ACP countries, with Economic Partnership Agreements.
5. The broad continental shelf, fed by numerous rivers, along with seasonal oceanic upwelling provides Guinea Bissau with an extraordinarily rich fishery resource, in both coastal and oceanic species. Commercial stocks include demersal fish species, small pelagic fish, migratory large pelagic fish, shrimp (both deep- and shallow-water species) and cephalopods (cuttlefish and octopus). Around 10-12,000 artisanal fishermen many of them of foreign, origin operate in the coastal regions. Subsistence fishing is carried out by many more in all coastal or riverine areas. Catches from the artisanal sector have recently been estimated to be in the range of 30-50,000 tonnes/year, much higher than previously thought, and food dependency on fisheries is probably extremely high given the lack of alternative sources of animal protein.
6. Overall, during 2007 to 2008 about 124 industrial fishing vessels each year have operated in the Guinea Bissau zone. All undertake freezing onboard. This is a significant reduction in the numbers of vessels licensed to operate in 2003 (190) and 2004 (172). The vessels operate under different regimes. Most national operators have re-flagged to countries which meet EU sanitary requirements, to maintain access to EU markets. IUU fishing in Guinea Bissau waters is a traditional problem. During 2008 and 2009, Guinea Bissau authorities apprehended 58 vessels for fisheries offences, 11 of which were fishing without a license, and 7 were fishing in prohibited zones.
7. In addition to the EU, Guinea Bissau has bilateral fisheries agreements with Senegal and China, both of which were renewed in 2010. Overall, there appears have to have been a



significant effort to harmonise access arrangements between agreements, and to make them more transparent, compared to the situation in 2004.

8. Since it was signed in 2007, an annual average of 62 EU vessels has operated under the Fisheries Partnership Agreement. This has supported the deployment of an annual average of about 68 EU vessels (15 fish/cephalopod trawlers, 23 shrimp vessels, 11 pole and line vessels and 19 purse seiners). One Irish trawl vessel drew a fishing licence in 2008 and 2009, operating outside the partnership agreement. A number of EU operators of non-EU flagged vessels also access the EEZ under other arrangements (private charter, or under the Agreement with Senegal).

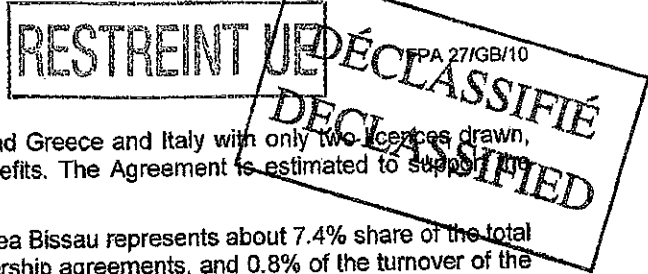
9. The production from the overall industrial fishery (including that of the EU) was estimated at 53,000 tonnes in 2008. Overall, about half of the production is small pelagic fish, such as mackerel, horse mackerel and sardinellas. About 40% is demersal fish, represented by a large number of species, including breams, sweetlips, croakers, catfishes and soles. Cephalopods account for about 5% of the catch, mainly in the form of cuttlefish and octopus. Tuna species account for 5% and shrimp and crabs account for just 2%. In general, industrial operators tranship their catches or land outside the country (e.g. Dakar or Canary Islands). Economic benefits from the industrial fishery to Guinea Bissau are mostly limited to compensation, access and observer fees, and some crew employment in the demersal fisheries. There is only one operational processing establishment.

10. Fisheries administration, management and development fall under the responsibility of the Ministry of Fisheries and its Directorates, along with two autonomous bodies; FISCAP responsible for fisheries monitoring control and surveillance, and CIPA responsible for fisheries research and sanitary controls. A fisheries development strategy has been drafted with EDF support, but has not been adopted. FISCAP operates an observer corps with 100% coverage of licensed vessels, and operates a number of fast small patrol vessels. It has proven capacity to apprehend non-compliant vessels but there are outstanding gaps in the control system. An adequate and modern framework Fisheries Law was drafted with EU support in 2005, but has not been approved. Sanitary controls have been strengthened (with significant technical assistance and other inputs from the EDF SFP project), but until now compliance with EU sanitary rules remains elusive.

11. Despite these limitations, and an unstable political environment, during the last four years there have been notable improvements in fisheries monitoring control and surveillance capacity and strengthened participation of Guinea Bissau with regional fisheries bodies such as CSRP (although Guinea Bissau is not yet a member of ICCAT). International donor support has been important in this process (the EU, Spain and Japan are the main partners in fisheries), but budgetary support from the Fishery Partnership Agreement with the EU has also played an important part.

12. The current protocol under the Fisheries Partnership Agreement between the EU and the Republic of Guinea Bissau covers the period 16 June 2007 to 15 June 2011. This Agreement provides fishing possibilities for EU vessels fishing in the waters of the Guinea Bissau beyond the 12 mile coastal zone, including the Guinea Bissau-Senegal Joint Management Area. It includes annual fishing possibilities for up to 4400 GRT of freezer finfish and cephalopod trawlers, 4400 GRT of freezer shrimp trawlers, 14 pole and line tuna vessels and 23 tuna purse seiners or surface longliners. The EU financial contribution available is EUR 7,000,000 per year. This contribution includes an amount of 2,450,000 EUR (35% of the total) granted by the Community towards the promotion of sustainable and responsible fishing in Guinea Bissau waters. A further contribution of EUR 500,000 is specifically dedicated to the introduction of improved sanitary control system.

13. During the period 2007-2009, the rate of available licences drawn was 45% for the freezer finfish and cephalopod opportunities, 36% for shrimp, 76% for tuna pole and line and 83% for tuna purse seiners (no surface longline licences were drawn). The utilisation of demersal fishing opportunities was highly variable (range in annual utilisation rates from 17 to 65%). The average annual catches under the Agreement were 7,628 tonnes valued at EUR 32.1 million with a value added generated estimated at EUR 14.5 million/year. About 95% of the value generated the Agreement to the EU fleet is in the form of the demersal fishing opportunities for fish/cephalopods (47%) and shrimp (48%), and 5% is due to the tuna opportunities. Overall 84% of the value added is derived by Spanish vessel operators, and 13% by Portuguese.



France gains 2% of the agreement value, and Greece and Italy with only two licences drawn, and no catches, have not obtained any benefits. The Agreement is estimated to support the employment onboard of 470 EU nationals.

14. Fishing under the agreement with Guinea Bissau represents about 7.4% share of the total turnover of the EU fleets under fishery partnership agreements, and 0.8% of the turnover of the EU fishing fleet. With regard to the demersal fisheries, the Agreement delivers revenues averaging EUR 30.2 million, which is 14.4% of the value of all demersal fishing under all FPAs. It also represents approximately one quarter of the revenues of the distant water shrimp and cephalopod fleets (the balance being contributed by mainly the Mauritanian and Greenland FPAs).

15. For the European Union, the Agreement has had a modestly positive cost:benefit ratio of 2.2 (annual cost to the Commission plus the EU fleet of EUR 6.6 million, compared to an annual benefit of EUR 14.5 million). The average cost per tonne to the community of the catches made was EUR 866/tonne, representing some 21% of the ex-vessel price of the fish. Given this level of financial support, the associated financial contribution paid by the EU (with a nominal total of EUR 7.5 million per year) may be regarded as too high, representing poor value for the EU taxpayer. The Community pays a substantial amount per year for unused fishing opportunities. In this respect the Agreement cannot be regarded as a cost efficient method of achieving the policy objectives during the period covered by the evaluation. However, it should be considered that a certain degree of over-payment is inevitable with fixed fishing opportunities set at a level to accommodate the maximum desired rate of annual utilisation.

16. The main impact of the Agreement on Guinea Bissau has been that the Government Revenue Account has been credited with a financial amount averaging EUR 5.5 million/year plus licence and observer fees from vessel operators, of about EUR 1 million per year. Transfers from the Community were less than provided for in the Agreement due to the delayed implementation of agreed policy support measures by Guinea Bissau Government. The sector programme has fallen at least one year behind schedule.

17. These financial contributions have provided an annual average of about 7.3% of the state budget of Guinea Bissau. This revenue has helped Guinea Bissau to maintain macro-economic and political stability during the period. The sectoral support element has contributed some 88% of budgeted fisheries expenditure (the balance being made of restitutions of fines, observer and licence fees). There are no landings, nor transshipments, and only limited vessel visits. Other economic benefits are limited to the employment of some 148 Guinea Bissau crew onboard the EU vessels, creating some value added benefits averaging about EUR 1.2 million/year, in the form of remitted earnings. Overall, including the financial contribution, the total benefits to Guinea Bissau are estimated to be in the region of EUR 7.8 million/year. With a national GDP of EUR 575 million in 2008 the Agreement contributed 0.96% of the GDP. This may be compared with the budgetary support from the EDF which contributed some EUR 20.95 million in 2009. The FPA has provided about one quarter of the EU's transfers to this country, and has therefore made an important contribution to economic stability.

18. None of the tuna catches by EU vessels under the FPA account for more than 1% of the total exploitation of the species concerned. Yellowfin and skipjack bigeye tuna tunas are considered by ICCAT to be exploited within sustainable limits. However the assessment for bigeye tuna is subject to a degree of uncertainty due to concerns regarding undeclared catches. There is a finite probability that IUU catches are contributing to an unsustainable fishing effort on this species. However, since the FPA only accounts for an estimated 0.15% of effort this risk may be regarded as minimal, and the FPA should be regarded as sustainable in terms of impacts on tuna stocks.

19. However, the Agreement accounts for almost 100% of deepwater shrimp catch, 75% of other shrimp, 50-70% of the cephalopods and about 10% of the industrial demersal fish catches. Aggregate CPUE data for crustaceans, which consist mostly of shallow-water and deep-water shrimp, indicate a relatively stable (or even improving) conditions, due to a strong decrease in vessel numbers. For fish and cephalopods, there are conflicting trends in the available data. Whilst the overall situation appears to be stable, there is insufficient quantity and quality of data to perform accurate species based stock assessments, and there is a risk of unsustainable levels of exploitation on some species.

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20. CIPA produces an annual management plan for industrial fisheries. Fishing opportunities offered by Guinea Bissau have not exceeded those specified by the management plan. However the methodology has a number of important limitations and unstated assumptions. In addition, analyses do not take into account of the substantial catches from small scale fisheries, nor do they take account of discarding. The main priority is to build and validate species-specific CPUE time series for important target species in order to further elucidate the status of stocks.

21. There are also concerns regarding the wider ecosystem impacts of the fisheries contained within the Agreement. There are reports of increasing levels of discards of undersized skipjack tunas, ongoing concerns with regard to the demersal trawl segments regarding discards of non-commercial species and interactions with turtle populations. Data on discarding in Guinea Bissau fisheries is not available, as observers do not collect this, but it is expected to be substantial amongst shrimp trawlers in particular (and at least 60%). The possible effects of bycatch and discarding on relatively sensitive species such as sharks and rays are not known. The recent European Union Action Plan for the Conservation and Management of Sharks (2009) refers to shark catches by the EU demersal fleet in third countries. There are finite risks that the Agreement may not be sustainable in relation to these resources, and therefore not in line with the principle of responsible fisheries. More efforts are needed to improve the available information and to assess these impacts with a view to better risk management.

22. Most of the fishing operations conducted under the Agreement comply with the management recommendations of ICCAT and the fisheries management regulations of Guinea Bissau. Observers have been mobilised on all EU trawl vessels. During the period there have been only 2 arrests of EU vessels for non-compliances with technical fisheries measures (there have been more for unlawful refuelling). However, there are concerns regarding non-compliance with reporting conditions imposed on EU vessels in terms of entry and exit reporting, and submission of catch reports by vessels which need to be addressed

23. Within the Agreement, the partnership approach and the associated financial contribution have provided the means for the implementation of an agreed matrix of support measures in support of a sustainable fisheries policy. A Joint Committee was created by the parties and has held two meetings. The creation by the Commission of a new monitoring position based in Dakar, with regular monitoring missions and dialogue, has helped to keep track of disbursement progress and to ensure timely corrective actions when problems have arisen. However, the Scientific Committee only met in September 2010, which is a serious omission, especially given the doubts regarding the validity of the fisheries management recommendations and the risks to sustainability. Otherwise the parties to the Agreement have successfully implemented the partnership approach.

24. The implementation process has been impaired by the political and financial instability of Government, and by the structural difficulties of the fisheries administration. Transparency, reporting and monitoring conditions are also insufficient, which has limited the depth of the evaluation in terms of assessment of outputs and impacts. Despite these limitations it is clear that important progress has been made on agreed strategic objectives, most notably in relation to strengthened fisheries monitoring control and surveillance, and sanitary inspection capacity. Guinea Bissau's participation in regional fisheries bodies (especially CSRP) has also been strengthened, and there have been positive steps in drafting of new legislation, fisheries statistics and resource management. However, in large part due to events out the control of the fisheries administration, disbursement has been much slower than anticipated, and this has delayed implementation, so that the programme has only partially achieved its objectives within the time frame established by the parties.

25. Although many areas remain to be addressed, the contribution of the Agreement to these achievements should not be underestimated by the Parties. The proposed appointment in 2010 of EDF technical assistance to the Ministry of Fisheries to help with implementation of a partnership approach should help to accelerate the programme in the remaining period of the protocol (and is a measure which could be usefully considered for other FPAs in which the third country partner has weak implementation capacity).

26. The Fisheries Partnership Agreement has provided access to fishing opportunities for EU fleet segments from fishery dependent areas, created employment, and provided for additional

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supplies to the EU market. Although there are reservations regarding the sustainability of some of some of the opportunities exploited, the Agreement has proved to be highly relevant to the fisheries policy to the Common Fisheries Policy of the EU. The Agreement accounts for about one quarter of all transfers from the EU to Guinea Bissau, and the Agreement therefore provides an important supplementary pillar of support. The Agreement has started to deliver important developmental outcomes in terms of reduced IUU fishing, as well as the prospects of increased trade in fishery products and is therefore coherent with the EU's national and regional development approaches. Its support for fisheries MCS means that the Agreement is coherent with the EU's approach to reducing IUU fishing. There are specific synergies with a number of EDF regional development programmes (ACP Fish II, SFP and the forthcoming regional MCS programme implemented by CSRFP). The role of regional cooperation is common in several of the themes considered in the EU's Integrated maritime policy (especially in relation to good environmental status, economic growth across borders, connectivity and trade relations and maritime governance of marine waters). The EU has just launched a discussion on the applications of this policy to the Atlantic region, where the EU-Guinea Bissau Fisheries Partnership Agreement has relevance to a regionally integrated approach to all of these strategic elements.

27. For Guinea Bissau, the Agreement has delivered financial means for implementation of important measures to support economic development and sustainability of the sector. It has had a particular impact (along with some well focused donor support) on reducing IUU fishing and bringing the sector closer to meeting EU sanitary conditions for trade in fishery products, both important conditions for development of a national, onshore, fisheries sector. The FPA provides an important vehicle for sustaining the development agenda during periods of economic and budgetary instability. The Agreement has also allowed the EU and the Guinea Bissau Authorities to maintain a policy dialogue, with a view to promoting responsible fishing. As a conclusion, it appears that it is strongly in the interest of both parties to conclude a new protocol that would prolong this partnership between Guinea Bissau and the European Union..

**RESUME EXECUTIF**

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## SUMÁRIO EXECUTIVO

1. Este relatório apresenta os resultados de uma avaliação do actual Acordo de Parceria no domínio das Pescas (APP) entre a União Europeia e a República da Guiné-Bissau. O estudo foi encomendado pela Direcção-Geral dos Assuntos Marítimos e das Pescas da Comissão Europeia e conduzido por um consórcio constituído pela Oceanic Développement (França) e Megapesca Lda (Portugal). A missão incluiu uma revisão da documentação associada ao primeiro protocolo e actividades realizadas ao abrigo do mesmo e reuniões com os principais interessados, incluindo representantes do Governo da Guiné-Bissau e do sector das pescas, durante uma missão à Guiné-Bissau realizado em Agosto de 2010.
2. Guiné-Bissau é um país tropical situado no oeste africano com recursos naturais limitados. A população do país é estimado em 1,4 milhões, dos quais cerca de um quarto reside na capital de Bissau e o restante nas áreas rurais. Guiné-Bissau é classificado como um dos países menos desenvolvidos, onde cerca de dois terços das famílias vivem abaixo do limiar da pobreza e a taxa de alfabetização é baixa. O país qualifica actualmente para o alívio da dívida, sendo um país em desenvolvimento altamente endividado, mas não foi até agora capaz de implementar as reformas indicadas para poder satisfazer o FMI. Existe um Documento de Estratégia Nacional para a Redução da Pobreza (DENARP), adoptado em 2006. A economia é essencialmente agrícola com uma elevada dependência da exportação de uma única cultura, o caju, que rendeu 94 milhões de dólares em 2008. A situação económica do país é caracterizada pelo desinvestimento em anos recentes. É considerado um dos lugares mais difíceis para fazer negócios (classificado em 181 entre 183 países no censo anual do Banco Mundial). Devido a incumprimento com as medidas sanitárias da UE, não é possível tirar os potenciais benefícios do comércio de produtos da pesca com a UE.
3. O país é altamente dependente do apoio da cooperação internacional, contribuindo 31% da renda nacional em 2008. A UE é o principal parceiro, contribuindo cerca de um terço dos apoios internacionais (de cerca de 100 milhões de euros) em 2008. O Banco Mundial, a Espanha e Portugal são outros parceiros importantes. As receitas públicas em 2008 somavam apenas 76 milhões de euros, do qual cerca de um terço são contribuições dos parceiros internacionais ao orçamento do Estado, principalmente da UE.
4. Tal como acontece com outros países ACP, a estratégia da UE para a cooperação com a Guiné-Bissau é definida no Programa Indicativo Nacional (PIN). Este Programa foi aprovada pelas partes para o período 2008-2013 no âmbito do 10º programa FED e foi concebido para apoiar o DENARP e a realização dos Objectivos de Desenvolvimento do Milénio (ODM). O PIN atribui 53 milhões de euros a dois sectores focais; a) prevenção de conflitos e b) água e energia. Com o objectivo principal de conseguir a estabilidade macro-económica são atribuídas montantes adicionais no valor de 32 milhões de euros para apoio orçamental directo durante o período de 2008 a 2011. Guiné-Bissau é também um beneficiário das intervenções apoiadas no âmbito do Programa Indicativo Regional (PIR) do 10º programa FED para a África. A dotação total do FED para o PIR é de 597 milhões de euros. Guiné-Bissau decidiu participar com o grupo UEMOA nas negociações com a UE para substituir as preferências tarifárias actualmente em vigor, oferecidas unilateralmente pela UE aos países ACP, pelo Acordo de Parceria Económica.
5. Guiné-Bissau é dotada de uma plataforma continental ampla, alimentada por inúmeros rios, o que juntamente com o afloramento sazonal das correntes oceânicas contribui para a riqueza em recursos haliêuticos, tanto em espécies costeiras e oceânicas. Este recursos incluem peixes demersais, pequenos pelágicos, grandes peixes migratórios, camarão (também camarão de profundidade) e cefalópodes (lulas e polvos). Cerca de 4000 pescadores artesanais, muitos deles estrangeiros de origem, desenvolvem a sua actividade nas regiões costeiras. A pesca de subsistência é realizada por muitos mais ao longo da costa ou em zonas fluviais. As capturas do sector artesanal foram recentemente estimadas entre 30.000 e 50.000 toneladas / ano, muito mais elevada do que se pensava anteriormente, e a dependência alimentar em produtos da pesca é provavelmente extremamente elevado devido à falta de fontes alternativas de proteína animal.
6. Durante o período de 2007 a 2008, um total de cerca de 124 embarcações de pesca industrial operavam na zona da Guiné-Bissau. Todas estas embarcações têm capacidade de congelamento a bordo. Esta é uma redução significativa no número de navios licenciadas para



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a actividade de pesca comparado com o ano de 2003 (190) e 2004 (172). Os navios operam sob diferentes regimes. A maioria dos armadores nacionais mudaram de bandeira dos navios para bandeiras de países, que cumprem os requisitos sanitários da UE, mantendo assim o acesso aos mercados da UE. A pesca ilegal, não declarada e não regulamentada (INN) em águas da Guiné-Bissau é um problema já de longa data. Durante os anos de 2008 e 2009, as autoridades da Guiné-Bissau apreenderam 58 embarcações por infracções relacionadas com a pesca, das quais 11 eram de pesca sem licença e 7 por operações de pesca em zonas proibidas.

7. Além do acordo com a UE, a Guiné-Bissau tem acordos de pescas com o Senegal e a China National Fisheries Corporation (CNFC), ambos os quais foram renovados em 2010. Globalmente, parece haver um esforço significativo para harmonizar os acordos de acesso e de forma transparente, comparando com a situação vigente em 2004.

8. Desde que foi assinado em 2007 o Acordo de Parceria com a EU, este acordo possibilitou as operações de uma média anual de 68 navios da UE (15 arrastões de peixes/cefalópodes, 23 arrastões de camarão, 11 navios de linha e linha, e 19 navios de cerco). Um navio irlandês de arrasto obteve uma licença de pesca em 2008 e 2009, operando fora do acordo com a UE. Vários armadores da UE a operar navios sob bandeiras de outros países terceiros conseguiram acesso aos pesqueiros da Guiné-Bissau sob outras modalidades (afretamento ou ao abrigo do acordo com a Senegal).

9. A produção total da pesca industrial foi estimada em 53 mil toneladas em 2008 (incluindo a frota da UE). Globalmente, cerca de metade da produção é de pequenos peixes pelágicos, tais como a cavala, carapau e sardinella. Cerca de 40% da produção é constituída por peixes demersais, incluindo um número elevado de espécies tais como os pargos, corvinas, bagres e linguados. Os cefalópodes constituem cerca de 5% das capturas, principalmente na forma de choco e polvo. As várias espécies de atum representam 5% da produção e os camarões e caranguejos representam apenas 2%. Em geral, os armadores industriais transbordam ou desembarcam as suas capturas fora do país (por exemplo em Dakar ou nas Ilhas Canárias). Os benefícios económicos da pesca industrial na Guiné-Bissau são limitados a uma compensação, as taxas de licenças e de observador, e o emprego de alguns tripulantes na pesca demersal. Existe apenas um estabelecimento de processamento de pescado operacional.

10. A administração, gestão e desenvolvimento das pescas é da competência e responsabilidade do Ministério das Pescas e os seus serviços, em articulação com dois organismos autónomos; a FISCAP que é responsável pela fiscalização das pescas e o CIPA que é responsável pela investigação das pescas e o controle sanitário. Uma estratégia para o desenvolvimento das pescas foi elaborada com o apoio do FED, mas ainda não foi aprovada. A FISCAP opera um corpo de observadores com uma cobertura de 100% dos navios autorizados a pescar e opera também um número de navios de patrulha rápida, demonstrando a capacidade para apreender navios que estejam a operar em não-conformidade com a lei das pescas. No entanto, existem ainda lacunas no sistema de fiscalização das pescas. Com o apoio da UE foi elaborado um quadro legislativo para as pescas em 2005, considerando a necessidade de revisar e modernizar a vigente lei das pescas, mas este ainda não foi aprovado. Os controles sanitários foram reforçadas (com assistência técnica e outros apoios significativos do projecto SFP-FED), mas não foi até agora possível atingir a conformidade com as regras sanitárias da UE.

11. Apesar destas limitações e um ambiente político instável, houve uma melhoria notável no controlo e fiscalização das pescas durante os últimos quatro anos, incluindo o reforço da participação da Guiné-Bissau em Organizações Regionais de Pesca tais como a CSRP (apesar de a Guiné-Bissau ainda não ser membro de ICCAT). Os apoios de parceiros internacionais tem sido importante neste processo (a UE, a Espanha e o Japão são os principais parceiros no sector das pescas), mas o apoio orçamental através do Acordo de Parceria com a União Europeia tem desempenhado também um papel importante.

12. O actual protocolo do Acordo de Parceria entré a UE e a República da Guiné-Bissau abrange o período de 16 de Junho de 2007 a 15 de Junho de 2011. Este acordo prevê possibilidades de pesca para os navios de pesca da União Europeia nas águas da Guiné-Bissau fora da zona costeira de 12 milhas, e incluindo a Zona Marítima Conjunta gerido pela Senegal e Guiné-Bissau em parceria. O Protocolo inclui possibilidades de pesca, anualmente,

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até 4400 toneladas de arqueação bruta para arrastões congeladores de peixes / cefalópodes, até 4400 toneladas de arqueação bruta para arrastões congeladores de camarão, 14 navios de vara e linha (para o atum) e até 23 navios atuneiros de cerco e palangreiros de superfície. A contribuição financeira da UE é de 7.000.000 euros por ano. Esta contribuição inclui um montante de 2.450.00 euros (35% do total), concedido pela UE para a promoção da pesca sustentável nas águas da Guiné-Bissau, mais uma contribuição de 500.000 euros com o objectivo específico de melhorar o sistema de controle sanitário.

13. Durante o período de 2007 a 2009, a taxa de utilização das licenças disponíveis foi de 45% para a pesca de arrasto de peixes / cefalópodes, 36% para o camarão, 76% para vara e linha e 83% para o cerco (as possibilidades de pesca para o palangre de superfície não foram utilizadas). A utilização das possibilidades de pesca demersal foi muito variável (as taxas de utilização anual variou entre 17 e 65%). A média anual das capturas no âmbito do acordo foram de 7.628 toneladas, com um valor de 32,1 milhões de euros e um valor acrescentado estimado em 14,5 milhões de euros / ano. Em relação à frota da UE, cerca de 95% do valor criado está ligado às possibilidades de pesca para peixes demersais / cefalópodes (47%) e camarão (48%), e 5% é proveniente da pesca do atum. Globalmente, os armadores de navios espanhóis beneficiaram em 84% do valor acrescentado e os armadores portugueses em 13%. Armadores franceses beneficiaram 2% do valor do acordo. Armadores da Grécia e Itália, com apenas duas licenças emitidas e sem capturas alguma, não obtiveram qualquer benefício. Estima-se que o acordo contribui para a criação de 470 empregos a bordo dos navios para cidadãos da UE.

14. A actividades de pesca dentro do acordo com a Guiné-Bissau representam 7,4% do volume total de negócios da frota da UE no âmbito dos acordos de parcerias no domínio das pescas (APP), e de 0,8% do volume negócios do total da frota da UE. No que se refere à pesca de demersais, o acordo proporciona uma receita média de 32,1 milhões de euros, equivalente a 14,4% do valor total da pesca de demersais no âmbito de APPs. Em relação à pesca de camarão e cefalópodes, o acordo representa aproximadamente um quarto das receitas em águas de países terceiros (o saldo é proveniente maioritariamente dos APPs com a Mauritânia e a Gronelândia).

15. Para a União Europeia, o acordo resultou numa razão custo:benefício ligeiramente positiva de 2,2 (um custo anual de 6,6 milhões de euros para a Comissão Europeia e a frota da UE, comparado com um benefício anual de 14,5 milhões de euros). O custo médio por tonelada das capturas efectuadas foi de 866 euros / tonelada para a UE, representando cerca de 21% do preço do peixe à primeira venda. Portanto, a contribuição financeira paga pela Comissão Europeia (um valor nominal de 7,5 milhões de euros por ano) pode ser considerada demasiada elevada, representando pouco valor obtido na perspectiva do contribuinte da UE. A UE paga um montante substancial por ano para possibilidades de pesca que não são utilizadas. Nesta perspectiva, o acordo não pode ser considerada como um método eficaz em termos financeiros para atingir os objectivos políticos durante o período abrangido pela avaliação. No entanto, deve-se considerar que um certo grau de desperdício é inevitável, uma vez que as possibilidades de pesca são fixadas a um nível para acomodar o máximo desejado em termos de utilização anual.

16. O maior impacto do acordo para a Guiné-Bissau tem sido a receita de um montante financeiro de 5,5 milhões de euros por ano, em termos médios, e cerca de 1 milhão de euros por ano em taxas de licenças e de observador, proveniente dos armadores. As transferências da Comissão Europeia foram menos do que o previsto no acordo devido ao atraso na aplicação das medidas de apoio ao sector aprovadas pelo Governo da Guiné-Bissau. O programa de apoio ao sector sofreu um atraso de pelo menos um ano como consequência.

17. A contribuição financeira do acordo representou uma média anual de cerca de 7,3% do orçamento do Estado da Guiné-Bissau. Esta receita tem ajudado a Guiné-Bissau a manter estabilidade macro-económica e política durante o período. O apoio sectorial contribuiu com cerca de 88% da despesa orçamentada para o sector das pescas (o saldo é constituído por receitas através de coimas aplicadas, taxas de licença e de observador). Os navios da UE não desembarcam nem transbordam no porto de Bissau e o número de visitas ao porto é limitado. Os benefícios económicos são limitados ao emprego de cerca de 148 tripulantes guineenses a bordo de navios da UE, criando benefícios em cerca de 1,2 milhões de euros / ano na forma de salários. Em termos globais, e incluindo a contribuição financeira, estima-se que os benefícios totais para a Guiné-Bissau sejam na ordem de 7,8 milhões de euros / ano. Com um PIB nacional de 575 milhões de euros em 2008, o acordo contribuiu com 0,96% do PIB. Isto pode

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ser comparado com o apoio orçamental no âmbito do FED, o que contribuiu com cerca de 20,95 milhões de euros em 2009. Portanto, o APP contribuiu com cerca de um quarto das transferências da UE para este país, desempenhando um papel importante para manter a estabilidade económica.

18. As capturas de atum por navios da UE no âmbito do APP nunca ultrapassaram 1% da exploração total das espécies em causa. A ICCAT considera que a albacora e o gaiado são explorados dentro de limites sustentáveis. No entanto, a avaliação do patudo está sujeita a um certo grau de incerteza relacionado com o nível de capturas INN. Existe uma probabilidade de que as capturas INN estão a contribuir para um esforço de pesca insustentável dirigido ao patudo. No entanto, uma vez que o APP representa apenas cerca de 0,3% do esforço, este risco pode ser considerada como mínimo e o APP deve ser considerado como sustentável em termos de impactos sobre as populações das principais espécies de atum.

19. Por outro lado, a pesca dentro do APP constitui quase 100% das capturas de camarão de profundidade (gamba), 75% dos outros camarões, 50-70% dos cefalópodes e cerca de 10% das capturas de peixes demersais. Os dados agregados de captura-por-unidade-de-esforço (CPUE) para o grupo de crustáceos, constituído maioritariamente por camarão e camarão de profundidade, indicam um rendimento relativamente estável (ou até melhorias), provavelmente devido a uma forte diminuição do número de navios a operar. Para os cefalópodes, os dados disponíveis indicam tendências contraditórias. Embora a situação geral de exploração parece ser estável, existe uma falta de dados fiáveis para poder proceder à avaliação das espécies-alvo e existe um risco de níveis insustentáveis de exploração para algumas espécies.

20. O CIPA produz anualmente um plano de gestão da pesca industrial. As actividades de pesca nas águas da Guiné-Bissau não ultrapassam os limites especificados no plano de gestão. No entanto, a metodologia utilizada parece ter algumas limitações importantes e os pressupostos não são claramente identificados. Além disso, as análises não levam em conta as capturas significativas da pesca artesanal e não consideram os possíveis impactos das rejeições. A primeira prioridade seria de construir e validar séries temporais de dados de CPUE para espécies-alvo de forma a poder indicar o estado de exploração dos recursos.

21. Existem também preocupações sobre os impactos no ecossistema da pesca exercida no âmbito do APP. Estudos indicam um aumento dos níveis de rejeições de gaiado de tamanhos pequenos, e continuam as preocupações relacionadas com as rejeições de espécies não-comerciais na pesca de arrasto e possíveis interações com as populações de tartaruga. Os níveis de rejeições nas pescas da Guiné-Bissau são desconhecidos, uma vez que os observadores não recolhem esta informação, mas é provável que seja considerável na pesca de arrasto para o camarão em particular (pelo menos 60%). Os possíveis efeitos dos níveis elevados de capturas acessórias e as rejeições de espécies sensíveis, tais como os tubarões e raias, não são conhecidos. No recente Plano de Acção para a Conservação e Gestão dos Tubarões da UE (2009) refere-se à capturas de tubarões pela frota demersal da UE em países terceiros. Existem riscos, ainda por determinar, que o acordo pode não ser sustentável em relação a esses recursos e, portanto, pode não estar em consonância com o princípio de uma pesca responsável. São necessários mais esforços para melhorar a informação disponível e avaliar estes impactos, com vista a uma melhor gestão de risco.

22. As operações de pesca realizadas no âmbito do acordo cumprem de forma geral com as recomendações da ICCAT e os regulamentos das pescas da Guiné-Bissau. A cobertura dos navios de arrasto da UE pelo programa de observadores foi total. Durante o período houve apenas duas detensões de navios comunitários por incumprimento com as medidas técnicas definidas nos regulamentos das pescas (houve mais infracções em relação ao reabastecimento com combustível). No entanto, é preocupante o incumprimento das condições impostas aos navios da UE, nomeadamente as faltas de relatórios de entrada e saída na ZEE e as faltas na apresentação de relatórios de capturas efectuadas, que precisam ser abordadas.

23. No contexto do acordo, a abordagem de parceria e a contribuição financeira associada proporcionaram os meios para a implementação de um programa de medidas de apoio em prol de uma política de pesca sustentável. A Comissão Mista foi criada pelas partes e já realizou duas reuniões. A criação de um cargo de monitorização do acordo, baseado em Dakar, com missões de acompanhamento regulares e de diálogo, tem contribuído para acompanhar o progresso nas transferências financeiras e assegurar acções correctivas em tempo oportuno, quando os problemas surgiram. No entanto, o Comité Científico só se reuniu em Setembro de

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2010, o que é uma omissão grave, especialmente tendo em conta as dúvidas quanto à validade das recomendações para a gestão das pescas e os riscos para a sustentabilidade. Noutros aspectos as partes do acordo têm implementado com sucesso a abordagem de parceria.

24. O processo de implementação foi prejudicada pela instabilidade política e financeira do Governo, e por dificuldades estruturais da administração das pescas. A transparência, comunicação e monitorização das condições também são insuficientes, o que limita a avaliação em termos de resultados e impactos. Apesar destas limitações é claro que um importante progresso foi feito em relação aos objectivos estratégicos definidos no contexto do acordo, principalmente em relação ao reforço na capacidade de fiscalização das pescas e o controle sanitário. A participação de Guiné-Bissau em organizações regionais das pescas (especialmente CSRFP) também foi reforçada e foram tomadas medidas positivas para a elaboração de nova legislação, reforço do sistema de estatísticas das pescas e gestão de recursos. No entanto, em grande parte devido a eventos fora do controle da administração das pescas, o desembolso de financiamentos foi muito mais lento do que o previsto e isto atrasou a execução, de modo que os objectivos definidos foram apenas parcialmente alcançados dentro do prazo estabelecido pelas partes.

25. Embora falta ainda reforçar muitas áreas, as contribuições do acordo para atingir os objectivos não devem ser subestimadas pelas partes. A proposta nomeação de assistência técnica pela FED, em 2010, ao Ministério das Pescas para apoiar a implementação da abordagem de parceria deve ajudar a acelerar o programa de apoios no período restante do protocolo (e é uma medida que poderia ser considerada útil para os APPs em outros países terceiros com fraca capacidade de execução).

26. O Acordo de Parceria tem proporcionado o acesso às oportunidades de pesca para determinados segmentos da frota da UE, originários de zonas dependentes da pesca na UE, criou empregos e proporcionou produtos adicionais ao mercado da UE. Embora haja reservas quanto à sustentabilidade de algumas das possibilidades de pesca, o acordo mostrou-se altamente relevante para a Política Comum das Pescas da União Europeia. O acordo contribuiu com cerca de um quarto de todas as transferências da UE para a Guiné-Bissau e funciona, portanto, como um importante pilar complementar de apoio. O acordo começou a produzir resultados importantes em termos de redução da pesca INN e criou a perspectiva de um aumento do comércio de produtos da pesca, resultados que são coerentes com as estratégias definidas com a UE a nível regional e nacional. O apoio à fiscalização das pescas significa que o acordo também é coerente com a abordagem da UE para a redução da pesca INN. Existem sinergias específicas com vários programas de desenvolvimento regional do FED (ACP Fish II, SFP e o próximo programa regional de MCS a ser implementado pelo CSRFP). O papel da cooperação regional é identificado em vários dos temas abrangidos pela Política Marítima Integrada da UE (especialmente em relação aos assuntos ambientais, crescimento económico através de fronteiras, a conectividade e as relações comerciais, e da governação marítima). A UE acaba de lançar um debate sobre as aplicações desta política para a região do Atlântico, onde o Acordo de Parceria entre a UE e Guiné-Bissau tem relevância para uma abordagem integrada a nível regional, considerando todos estes elementos estratégicos.

27. Para a Guiné-Bissau, o acordo contribuiu meios financeiros para a implementação de importantes medidas de apoio ao desenvolvimento económico e a sustentabilidade do sector. O acordo teve um impacto significativo (junto com algum apoio dirigido de outros parceiros) na redução da pesca INN e avanços importantes na reunião de condições sanitárias para o comércio de produtos da pesca com a UE; duas condições importantes para o desenvolvimento do sector nacional e criação de condições em terra para tirar melhor proveito da produção das pescas. O APP serviu como instrumento importante para manter na agenda a política de desenvolvimento durante os períodos de instabilidade económica e orçamental. O acordo também permitiu a UE e as autoridades da Guiné-Bissau sustentar o diálogo político, tendo em vista a promoção de uma pesca responsável. Em conclusão, parece ser fortemente no interesse de ambas as partes a celebração de um novo protocolo que iria prolongar esta parceria entre a Guiné Bissau e a União Europeia.

## INTRODUCTION

In 2007, the EU and the Republic of Guinea Bissau concluded a bilateral Fisheries Partnership Agreement, providing fishing possibilities for tuna, demersal fish species and cephalopods, and crustaceans, for EU vessels fishing in Guinea Bissau waters. The current 4-year protocol setting out fishing possibilities and payments covers the period 16 June 2007 to 15 June 2011.

This Agreement provides fishing possibilities beyond the 12 mile coastal zone, including the Guinea Bissau-Senegal Joint Management Area. It includes annual fishing possibilities for up to 4400 GRT of freezer shrimp trawlers, 4400 GRT of freezer finfish and cephalopod trawlers, 23 tuna purse seiners or surface longliners, and 14 pole and line tuna vessels. It is important to note that the fishing possibilities for tuna vessels in the current protocol are substantially reduced with respect to the previous protocol, which provided possibilities for 70 vessels in total. Although the protocol allows a review of the number of fishing licences, the fishing possibilities have remained unchanged throughout. The EU financial contribution amounts to EUR 7,000,000 per year, plus a specific contribution of EUR 500,000 dedicated to the introduction of an improved sanitary control system for fishery product exports.

The Fisheries Partnership Agreement with Guinea Bissau is part of a network of fishery agreements with other ACP coastal States in the Eastern Atlantic Ocean, which include Gabon, Cape Verde, Cote d'Ivoire and São Tomé<sup>1</sup>.

The purpose of this evaluation study is to provide the European Commission with the data and technical analyses needed to prepare the negotiation of a new protocol of the Fisheries Partnership Agreement (FPA) between the Community and Guinea Bissau. This study can also evaluate the agreement in the context of Community fisheries development and maritime policies.

This final report presents information collected from various sources, including the European Commission, EU member states and the professional associations of EU ship owners concerned with the availability and utilisation of fishing possibilities. It also includes the findings of a mission to Guinea Bissau that took place between 12th and 21st August 2010, during which discussions were held with Guinea Bissau stakeholders to the Agreement including public authorities, private sector and NGOs. A list of persons met and consulted during the study is provided in Annex 1.

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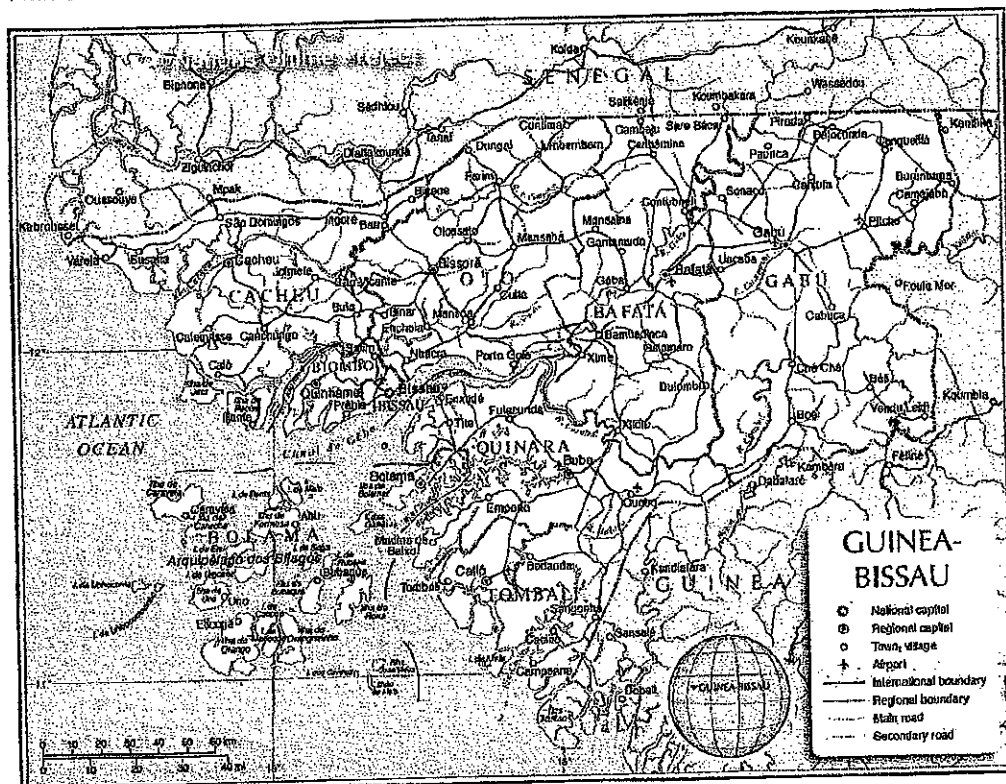
<sup>1</sup> An Agreement with Guinea Conakry was denounced by the European Council in November 2009

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## 1 GENERAL BACKGROUND

### 1.1 Geography

Guinea Bissau is a tropical West African country having Senegal as the neighbouring country to the North and the Republic of Guinea to the South. The coast line is interrupted by many estuaries and rivers. In the West the EEZ is extended by the archipelago of Bijagos with more than 80 islands.



Source: Nations Online : <http://www.nationsonline.org/oneworld/index.html>

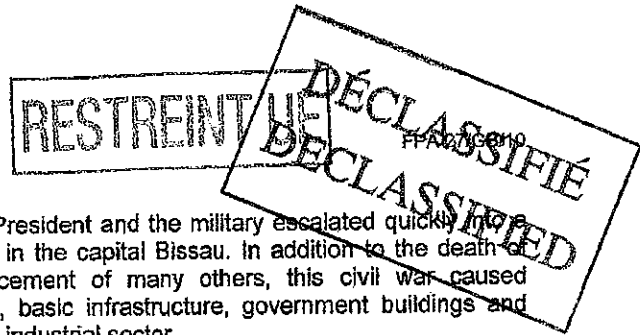
Figure 1: Map of Guinea Bissau

### 1.2 Population

The population of the country is estimated at 1.4 million, about a quarter of which reside in the capital Bissau. However, the majority of the population lives a rural existence. The country has a wide ethnic composition with several languages spoken, although Portuguese and crioulo together form the lingua franca. About 45% of the population are Muslim, mainly speaking Fula and Mandinka, concentrated in the North and northeast. About 50% follow animist or traditional beliefs and 5% are Christians.

### 1.3 Recent political developments

After independence the country enjoyed only a brief period of stable constitutional rule (1974-1980). In late 1980, the first government was overthrown in a relatively bloodless coup led by Prime Minister and former armed forces commander João Bernardo "Nino" Vieira, who would rule this country for 19 years from 1980 to 1999. In 1984 a new single-party National Popular Assembly (ANP) was reconstituted. Under this system, the president presided over the Council of State and served as head of state and government. The president was also commander in chief of the armed forces.



In 1998-99 a power struggle between the President and the military escalated quickly into a much broader armed conflict concentrated in the capital Bissau. In addition to the death of several thousand people and the displacement of many others, this civil war caused widespread damage to the housing stock, basic infrastructure, government buildings and equipment and the virtual annihilation of the industrial sector.

Political instability continued after the civil war. President Vieira was ousted by a military coup in May 1999. In February 2000 an interim government turned over power to the founder of the Social Renovation Party (PRS) Kumba Yala, following two rounds of transparent presidential elections. Despite the elections in 2000, democracy did not take root in the succeeding 3 years. President Yala neither vetoed nor promulgated the new constitution that was approved by the National Assembly in April 2001. On November 14, 2002, the President dismissed the government of Prime Minister Alamara Nhasse, dissolved the National Assembly, and called for legislative elections. These were postponed several times, and on September 14, 2003 the army intervened, led by Chief of Defence General Seabra. President Yala announced his resignation and was placed under house arrest. The government was dissolved and a 25-member Committee for Restoration of Democracy and Constitutional Order was established. On September 28, under pressure exerted by ECOWAS, the Charter of Political Transition was accepted and the nomination of businessman Henrique Rosa for the presidency was carried by consensus.

The transitional government immediately undertook measures to re-establish the normal functioning of democratic institutions. In March 2004, Guinea-Bissau held legislative elections which international observers deemed acceptably free and fair. On May 9, 2004, Carlos Gomes Junior became Prime Minister. In October 2004, an army mutiny over unpaid salaries ended with the signing of an accord between the government and the army mutineers. Sufficient stability was restored for presidential elections, with the second round held on 25th July 2005. The EU, the African Union, the United States and the African Union sent observers to the poll, which passed peacefully, resulting in victory for Nino Viera. A period of relative calm ensued, but during this period the country became a major staging post for smuggling Colombian cocaine to Europe. In 2007, the prime minister Aristides Gomes resigned after the three main parties signed up to a "stability pact" and carried a no-confidence vote against him. The pact fell apart after a year, and key parties withdrew from the national unity government (after representatives are sacked from senior financial posts). In 2008 the head of the Navy was suspended and put under house arrest and the level of unrest in the army increased, with rumours of coups and plots. In November President Vieira survived an attack by dissident soldiers, and recruited a 400-strong presidential bodyguard. On 1 March 2009 the Armed Forces Chief of Staff Na Wai was killed in attack on armed forces headquarters. The next day President Viera was assassinated at his residence, possibly by soldiers in retaliation for the killing of the Chief of Staff.

Presidential elections were held and Rachide Sambu-balde Malam Bacai Sanhá was sworn in as president on September 8, 2009. Since this time, the military, or factions within it, has continued to be a de-stabilising influence. On April 1, 2010 army officers captured the Prime Minister and the Army Chief of Staff. The Prime Minister was later released, but the Chief of Staff is still held, and a new incumbent has been nominated to this post. The international community has condemned the ongoing interference of the military in civilian government and the failure to uphold the rule of law.

## **1.4 Economic situation of Guinea Bissau**

### **1.4.1 Macro-economic situation and outlook**

After many years of conflict and political instability, Guinea-Bissau remains a fragile country in perpetual crisis, and one of the poorest in the world (ranked 172 out of 177, according to the UNDP's human development index). Poverty is widespread, with about two-thirds of households living below the poverty line and the literacy rate continues to be low.

The civil war in 1998/99 is estimated to have destroyed two thirds of the economy. After a recovery in 1999 and 2000, the economy has stagnated again in the period 2001-03. Average

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economic growth picked up to 3.4% by the end of 2005, but deteriorated sharply in 2006 due to problems in marketing of the country's cashew crop. In 2007 growth was just 2.7% due to late rains and consequently lower rice production, but rose to 3.1% in 2008. GDP in 2008, was therefore about FCFA377 billion (about EUR 575 million).

The basic macro economic and financial indicators are shown in Table 1.

Major issues are continuing instability in the government, poor infrastructure and a very high degree of dependence on one export – cashew. The government remains heavily indebted with external debt amounting to more than \$670 million as of the end of 2006, debt service falling due in 2007 amounted to 84% of budgetary revenues and 130% of tax revenues not counting arrears from previous periods.

According to IMF despite the difficult external environment and its political challenges, in 2009 Guinea-Bissau made progress in stabilizing its economy through the Emergency Post-Conflict Assistance (EPCA) supported program. Real GDP growth reached 3%, driven by a favourable cashew harvest and a pick-up in construction activity; inflation slowed, and the budget was stabilized.

The low tax base and the high fixed expenditures, make public financial management rigid and leave almost no room for much needed social and development expenditures. Despite recent improvements in revenue and expenditure management, the financing of the budget continues to rely heavily on external budget support from donors.

Growth is expected to increase to 3.4% and 4% respectively in 2010 and 2011, as a result of increased agricultural production and donor support. The major downside risk is the ongoing political instability described above. For the mid-term, inflation is expected to remain within the Central Bank of West African States boundary of 3%, up from a negative rate in 2009.



Table 1: Selected Economic and Financial Indicators, 2008-2012

	2008	2009	2010	2011	2012
	Estimated		Projected		
	(Annual %age change, unless otherwise indicated)				
<b>Real GDP at market prices</b>	3.5	3	3.5	4.3	4.5
<b>External sector</b>					
Exports, f.o.b.	61.7	-9.6	13.8	7.5	10.6
Imports, f.o.b.	38.1	-2.7	9.2	9.2	6.3
Export volume	17	25.9	4.3	5	5.1
Import volume	5.6	17.4	3.3	7.7	5
<b>Government finances</b>					
Domestic revenue (excluding grants)	30	2.3	21.5	3.3	7.4
Total expenditure	9.2	11.4	12.8	0.1	5.7
Current primary expenditure	3.7	0.8	13.2	2.3	5.3
Capital expenditure	13.8	40.7	12.5	6.5	6.5
<b>Investments</b>	(million EUR, unless otherwise indicated)				
Gross investment	72.9	97.0	104.1	110.9	118.9
Of which: government investment	37.6	58.4	63.8	68.0	72.5
	0.0	0.0	0.0	0.0	0.0
<b>Government finances</b>	0.0	0.0	0.0	0.0	0.0
Budgetary revenue	52.6	54.2	65.8	68.0	72.5
Total domestic primary expenditure	71.1	71.1	90.7	93.2	97.9
Domestic primary balance	-18.5	-17.5	-24.9	-25.2	-25.4
Overall balance (commitment basis)	0.0	0.0	0.0	0.0	0.0
Including grants	-22.0	10.8	-20.4	-8.2	-8.0
Excluding grants	-68.8	-81.3	-86.8	-85.0	-88.4
Current account balance (including official current transfers)	115.7	78.3	-72.8	-15.6	4.3
Overall balance of payments	-97.7	-152.4	-5.149.8	4.1	8.7
Nominal stock of external arrears, end of period	2,247.6	2,408.1	592.5	631.1	672.7

Source: IMF, Public Information Notice (PIN) No. 10/56, May 11, 2010

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The country remains largely dependent on the agricultural sector (about 60% of GDP, see Table 2), with a small domestic market and a narrow export base vulnerable to shocks. Agriculture is by far the most important sector, accounting for about 60% of the total. Commerce is next in importance at about 16% while industry (which includes utilities) amounts to a maximum of 9%, only slightly more than public administration.

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Table 2: Real Gross Domestic Product by Sector, 2003-06

	2003	2004	2005	2006
	(% of GDP)			
Agriculture, fishing	61.2	59.9	60.3	59.6
Industry (including water and electricity)	9.0	8.9	8.7	9.0
Construction	3.0	3.0	3.0	3.1
Commerce, restaurants, and hotels	16.0	16.6	16.8	16.8
Transport	2.7	2.8	2.7	2.7
Banks, insurance, and other services	0.4	0.4	0.4	0.4
Public administration	7.8	8.4	8.2	8.3
GDP at factor cost	100	100	100	100

Source: Ministry of Finance and IMF estimates

(Constant 1986 prices)

Cashews are the biggest cash crop, bringing in 95% of export revenues. All cashew nut production is exported to Indian enterprises which shell, process and package the nuts. Generally, the nuts of Guinea Bissau are considered to have the highest yield in West Africa and the country is now the world's sixth largest producer of cashews. The vast majority of the cashew crop is produced by small farmers but they gain little added value.

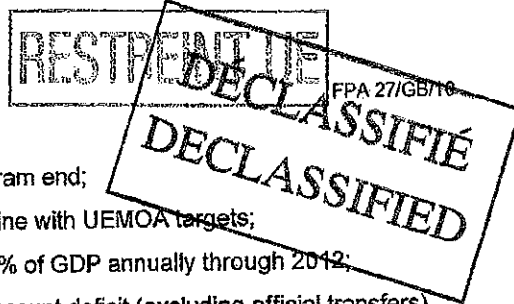
Production and trade in forest products have been halted while implementation of reforestation policies occurs. Fishery resources are significant, but have not been effectively managed and have not delivered their development potential. Fish exports and fisheries access agreement contribute significantly to the balance of payments and they are a major source of government revenues. Between 1987 and 2003, fishery product exports fell from 17% to 0.5% of the total value of the country's exports. Licensing of foreign flagged vessels fishing in Guinea Bissau waters but landing their catch in other countries has accounted for over 50% of government revenues in the recent past. More recently in 2006, government revenue from fishing licenses and from compensations fell from US\$ 19.1 million in 2003 to US\$ 14.4 million. Even so, it represents a significant share of the government's total revenue.

### 1.4.2 Economic development policy

#### Medium term strategy

In the medium term the government is committed to pursue an economic program for 2010-12 to help the country move towards fiscal and debt sustainability, as well as achieve stronger economic growth and poverty alleviation. The programme focuses on strengthening public finances; modernizing the public administration and rebuilding technical and policy implementation capacity; increasing access to social services and basic infrastructure; and removing impediments for private sector development.

Its macro-economic objectives are to:



- Raise real GDP growth to 4½% by program end;
- Contain inflation below 3% per year, in line with UEMOA targets;
- Keep the primary budget deficit below 4% of GDP annually through 2012;
- Gradually narrow the external current account deficit (excluding official transfers).

To achieve these objectives, the government program sets out the following policy priorities:

- Strengthen public finances, in PFM and other areas, with a view to containing the fiscal deficit and supporting macro stability;
- Normalize the government's relations with domestic banks and the private sector by addressing the large stock of domestic arrears;
- Modernize the public administration to create space for priority spending and raise the quality of public services through a medium-term civil service reform and security sector reform program;
- Promote good governance and increasing and transparency.
- Promote job creation by removing impediments to private sector development and strengthen the provision of financial services;
- Improve access to social services and step up efforts to alleviate poverty via government investments in infrastructure for power, roads, and the port;
- Move toward debt sustainability, particularly by helping the country achieve the HIPC/MDRI completion point.

Over the medium-term, the pick-up in growth is to be driven by sustained cashew production; expanded and diversified agriculture (including rice); increased activity in cashew nut processing and industrial fishing, and steady rebuilding of public infrastructure, especially roads, electricity, and water. Supported by the exchange rate peg of the CFLA Franc, inflation is expected to remain subdued, in line with global food and fuel prices.

The program, to be supported by the IMF under the Extended Credit Facility (ECF), is consistent with the country's Poverty Reduction Strategy. Satisfactory performance under the program could also pave the way for Guinea-Bissau to reach its completion point and thus benefit from debt relief under the enhanced Heavily Indebted Poor Countries (HIPC) Initiative and Multilateral Debt Relief Initiative (MDRI). It also seeks to promote job creation by removing impediments to private sector development and to enhance the provision of financial services.

It is of primary importance that the job of formulating and implementing economic policy be put on a more stable and long term basis. The extreme instability in Guinea-Bissau's government has meant that cabinet ministers and lower officials change on an annual or even more frequent basis. This situation makes long term planning and sustained implementation virtually impossible and the formulation of coherent policy equally difficult.

#### **Poverty reduction strategy**

With the support of multilateral agencies, the government developed and approved the final version of the Documento de Estratégia Nacional para a Redução da Pobreza (DENARP), equivalent to a poverty reduction strategy paper (PRSP), which was issued in 2006. The document is currently under revision. However the situation today is largely unchanged and the DENARP is still an accurate statement of the government's intentions.

In general terms, the strategy endorses four pillars of action:

- The first pillar aims to strengthen governance, modernize public administration and ensure macro-economic stability. The measures provided for under this pillar are: (i) pursuance of improvements in budgetary management; (ii) strengthening macro-economic management; (iii) public administration reform; (iv) capacity building; (v)

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promotion of efficient, transparent, accessible and independent justice and strengthening of the National People's Assembly (ANP); (vi) promotion of rural development and social cohesion; (vii) demobilization, redeployment and improvement of the living conditions in barracks; and (viii) the transformation of the security and defence forces into agents for pacification and consolidation of the rule of law.

- The second pillar aims to promote economic growth and employment creation. The measures envisaged under this are: (i) improvement of the business and investment climate; (ii) activation of the productive sectors of the economy and promotion of diversification and competitiveness of the economy; (iii) rehabilitation of the energy sector; (iv) development of road infrastructure; (v) development of overland and waterways infrastructure; and (vi) supporting the sectors of air transport, weather forecasting and communications.
- The third pillar focuses on an increase of access to social services and basic infrastructure. The measures under this strategic domain are: (i) increased access to primary, secondary and third cycle education; (ii) guarantee of quality basic education; (iii) improvement in the offer and quality of health services; (iv) fight against HIV/AIDS, tuberculosis, malaria and other diseases; (v) improvement in the situation of mothers and children; (vi) improved access to drinkable water and sanitation; and (vii) improvement in housing conditions.
- The fourth pillar aims at improving the living conditions of vulnerable groups. The measures envisaged in this strategic domain are: (i) improvement in the social protection conditions for vulnerable groups; (ii) promoting income-generating activities; (iii) promoting centres for addressing problems of illiteracy among women; and (iv) promoting sports and regenerating residential living spaces.

The Government, through targeted reforms outlined in the DENARP, plans to develop the country's human capital, to accelerate progress on achieving the MDGs by improving health and education services and to include vulnerable populations in the country's economic and social development. These reforms include:

- Improving the education system
- Improving the health system
- Promotion of professional training and employment for youth
- Addressing the problems of the vulnerable groups

To reduce poverty and consolidate peace, Guinea-Bissau will clearly need ongoing financial and technical support for social sector development. Given the country's current financial difficulties, most of this support can only come from development partners who are currently the largest providers of most public investment.

### 1.4.3 Government Revenues and Expenditure

The evolution of national budgeted revenue and expenditures improved over the period 2003 to 2008 as shown in Table 3. Guinea-Bissau's capacity to raise finance is severely hampered by political instability and the low capacity of the tax administration. Small gains made during peace times are practically undone during times of conflict. As a result, over the past decade, growth in the Guinea-Bissau's government revenues has been unstable, and in some years revenue has actually fallen. The Government remains substantially dependent on international aid.

Table 3: Key Revenue Sources and Expenditures 2003/2009

	2003	2004	2005	2006	2007	2008
	Millions of Euros					
<b>Budgetary revenue</b>	43.8	74.7	57.7	71.6	76.4	75.6
Current Revenues incl. Tax	31.3	37.4	42.7	47.5	39.9	50.5
Other Revenues	0.0	0.0	0.0	0.0	0.0	0.0
Grants	12.5	37.4	15.0	24.1	36.5	25.0
<b>Total expenditure and net lending</b>	62.5	107.3	79.0	79.6	83.0	75.1
Current expenditures	42.4	64.1	60.0	61.1	62.7	70.1
- Wages and Salaries	16.0	24.6	30.5	28.8	30.1	30.7
- Expenditure on Goods and Services	16.0	6.9	14.4	16.9	12.1	13.8
- Transfers	9.6	7.6	9.3	12.7	14.4	16.6
- Other	0.0	11.7	3.5	2.2	3.9	6.3
- Interest Payment on Debt	0.8	13.3	2.3	0.5	2.3	2.7
Capital expenditures	13.1	43.2	18.9	17.2	18.3	2.6
Other expenditures	1.5	0.0	0.2	1.4	2.1	2.4
Loans	5.5	0.0	0.0	0.0	0.0	0.0
<b>Overall balance</b>	-18.8	-32.6	-21.3	-8.0	-6.6	0.5

Source: Ministry of Finance, Guinea Bissau

The tax administration capacity remains poor and its complexity encourages the growth of the informal economy. The alternative agriculture sector and the large number of people working in the informal sector hinder revenue collection. The Finance Ministry reports that only 22 000 people paid income tax in 2008. Non-compliance is also a result of outdated and incomplete taxation laws, and there is pressure for reform. Poor tax administration and the large informal sector have led to an over-reliance on indirect taxes collected at customs which, over the past decade, have accounted for 85% of all tax revenues. Tax revenues as a percentage of GDP remain low at about 10%.

Since 2008, an International Monetary Fund (IMF)-supported Emergency and Post-Conflict Assistance Program (EPCA) has supported efforts to strengthen public financial management, revenue mobilization and expenditure controls. Reforms agreed under the EPCA and implemented in 2009 include an audit of domestic arrears. These arrears include salaries, commercial and West African Development Bank (BOAD) arrears, and private sector arrears. At the end of 2009, domestic arrears accounted for 45% of GDP. Under a 2009 programme, the government will clear the arrears over five-years from 2010. Other reforms included the establishment of a legal framework for UEMOA budget classification and an integrated management system for public accounts. The new management system aims to integrate budget preparation, execution and accounting and improving expenditure monitoring.

The 2010 budget law foresees a significant increase in revenues, due to the reintroduction of import tariffs. Expenditure is set to increase, in line with a revised poverty reduction strategy and a much bigger effort will be put into social sectors (health and education), agriculture and infrastructure. Fiscal discipline, in line with the framework defined with the IMF, and increased ODA should lead to a mid-term reduction in fiscal imbalances.

#### 1.4.4 External trade

Tables 4, 5 and 6 show the recent trade performance of Guinea Bissau. The value of imports consistently exceeds the value of exports (imports are 72% higher than exports), contributing to a large trade deficit. Food (particularly rice and flour) and fuel products represent on average respectively 38.6 and 21.2% of total merchandise imports over the 2003-2007 period despite more than 90% of population working in agriculture.

**Table 4: External trade in goods**

	1988	1998	2007	2008
	(US\$ millions)			
Total exports (fob)	16	26	73	94
Cashew nuts	9	24	72	91
Fish and shrimp	1	1	..	..
Manufactures	..	..	..	..
Total imports (cif)	66	63	116	162
Food	15	17	29	43
Fuel and energy	4	6	20	34
Capital goods	11	26	21	24
Export price Index (2000 = 100)	68	61	90	112
Import price Index (2000 = 100)	61	73	150	184
Terms of trade (2000 = 100)	111	84	60	61

Source: World Bank

On the export side, Table 4 also shows the importance of cashew nuts, with no other export item amounting to even 1% of the value of this crop. Fishery resources within the EEZ are largely utilised by foreign operators (with access by either bilateral agreement or private charter arrangements). Next in importance are petroleum products. Non-registered trade is nearly a third of the total.

Cashew nuts, represented between 88 and 99% of total export revenue between 1999 and 2007, according to IMF sources. Guinea-Bissau is the African country with the highest export concentration. The bulk of cashew nuts exports go to India (between 95 and 99% in the most recent years, according to the Customs administration) where the raw nuts are further processed for local consumption and re-exported to East Asia and developed countries' markets.

Fish exports do not show up in the official export statistics. Industrial vessels have no incentive to adopt the Guinea Bissau flag since fishery products from this origin do not meet the requirements of the EU food safety regulations. Foreign revenues from fishing appear in the balance of payment under a subcategory of transfers, entitled "fishing rights".

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**Table 5: Merchandise exports f.o.b. 2000-06**

	2000	2001	2002	2003	2004	2005	2006 (pre)
	(Millions of EUR)						
Total merchandise exports	66.77	56.18	57.02	55.54	61.63	71.68	49.20
Agricultural products	65.27	54.49	52.13	50.63	59.51	68.08	45.36
- Groundnuts	0.00	0.00	0.00	0.00	0.16	0.08	0.08
- Cotton	0.54	1.46	1.70	0.80	0.08	0.00	0.00
- Cashew nuts	64.30	53.03	50.32	49.73	59.19	67.92	45.20
- Other	0.32	0.00	0.00	0.00	0.08	0.08	0.08
Fish products	0.22	0.90	0.11	0.18	0.24	0.72	0.80
- Fish	0.00	0.00	0.11	0.09	0.16	0.48	0.56
- Shrimp	0.11	0.90	0.00	0.09	0.08	0.24	0.24
- Other	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wood products	0.43	0.45	0.96	0.80	0.16	0.16	0.16
- Swan wood	0.11	0.00	0.64	0.54	0.16	0.16	0.16
- Logs	0.32	0.45	0.32	0.27	0.00	0.00	0.00
- Other	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Miscellaneous	0.86	0.22	3.83	4.02	1.71	2.72	2.88
Unit prices	(EUR per metric ton)						
Groundnuts	845.16	846.07	696.81	764.29	739.84	615.20	663.20
Cotton	63.44	53.93	48.94	56.25	50.41	44.00	46.40
Cashew nuts	878.49	674.16	580.85	518.75	586.18	597.60	490.40
Fish	486.02	595.51	687.23	580.36	563.41	595.20	859.20
Shrimp	3,256.99	3,480.90	3,320.21	2,950.00	2,686.18	2,643.20	3,815.20
Swan wood	306.45	317.98	290.43	253.57	263.41	262.40	273.60
Logs	194.62	177.53	155.32	130.36	141.46	145.60	149.60

The pattern of international trade partners in imports and exports is shown in Table 6.

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Table 6: Direction of Trade 2000-06 (% of total)

	2000	2001	2002	2003	2004	2005	2006
<b>Exports</b>							
Industrial Countries	4.2	3.8	9.8	13	27.4	4.3	2.8
- France	0.7	0	0.2	0.3	0	0	0
- Netherlands	0.1	0	0	0.2	0.4	0.3	0
- Portugal	1.1	1.8	2.9	2.6	0.8	1.1	1
- Spain	0	0	0.3	0.1	0	0	0
- United States	0.4	0	0	2.6	22.2	0.2	0.3
Other	1.9	2	6.3	7.4	4	2.7	1.5
Africa	1.5	2.4	4.5	19.1	16	21.4	18.4
- Cape Verde	0	0	0.1	0.1	0.1	0.1	0.1
- Gambia, The	0.1	0.1	0.1	0.2	0.1	0.2	0.2
- Guinea	0.2	0.5	0.8	1.9	0.2	0.3	0.3
- Nigeria	0.7	0.4	2.5	15.7	13.2	19	17.3
- Senegal	0	0	0	0.9	1.1	1.5	0
- Other	0.5	1.4	1.1	0.3	0.2	0.4	0.6
Asia	48	77	61.7	62.5	54.1	69.7	74.7
- China	0	0	0	0.1	0	0.2	0
- Thailand	0.2	31.2	23.8	0	0.2	0	0
- India	45	44.5	36.1	62.3	52.2	67.4	72.7
- Other	2.9	1.2	1.8	0	1.6	2.1	2
Other	46.2	16.9	23.9	5.3	3.5	4.5	4.1
<b>Imports</b>							
Industrial Countries	47.2	41.6	46	36.6	32.3	45.1	43.3
- France	3.6	2.6	2.5	2.7	2.2	2.5	2.9
- Germany	1.5	1.7	2.7	0.7	0.6	0.5	0.9
- Italy	2	2.1	3.4	8	3.7	20.4	12.2
- Netherlands	3.1	3.4	3.6	2.9	4	3	3.5
- Portugal	26.8	20.7	20.9	13.3	13.8	12.7	17.6
- Spain	1.2	1.8	2.5	4.04	2.3	1.2	1.6
- Sweden	0.2	0.4	0.2	0	0.9	0.3	0.5
- United Kingdom	1.8	2.2	1.8	0.9	0.8	0.3	0.7
Other	12	22	15	30	38	14	17

Source: IMF Article IV Statistical Annex, November 2007



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Guinea-Bissau's integration into the UEMOA economic and monetary zone has brought about some changes in the origin of imported goods. Imports from the EU fell from 57% during the period 1990-1992 to an average of 46.5% during 2004-2006, according to IMF data. This trend is mostly due to a fall of imports from Portugal, from an average of 30% during 1990-92 to about 16.4% during 2004-2006.

During the same period, imports from Senegal have increased steadily and have gradually overtaken Portugal as the most important source of imports. Imports from China are on the rise, but according to the IMF, they are still below 5% during 2004-2006. It is surprising that almost no import flows seem to have developed in recent years with India (less than 1% of imports), although this country receives between 90 and 95% of Guinea-Bissau's exports,

Informal trade flows are important in Guinea-Bissau as in most African countries. By definition, it is very difficult to obtain estimates. For cashew nuts, some reports give an estimate of 30% for informal exports, mainly through Senegal and The Gambia, where exporters seek to take advantage of lower port costs at Banjul and Ziguinchor compared to Bissau, with better roads and comparable distances.

The government has long taken a negative view of such shipments, since they avoid paying the required export tax. While the ECOWAS free trade area allows for duty free importation of goods originating in member countries, it does not remove the obligation to pay export taxes. Reports in 2008 stated that the government was actively seeking to close the northern border to cashew shipments. In 2010, as measure to stimulate trade, the Ministry of Economy has established a working group to investigate the creation of a free-trade zone.

#### 1.4.5 Investment environment

The business climate is not encouraging. In the 2010 edition of Doing Business (published by the World Bank), out of 183 countries, Guinea Bissau was ranked 181<sup>st</sup> (beating only DR Congo and Central African Republic). On most measures its ranking fell compared to 2009, and in starting a business it ranked bottom.

The Government has sought to improve the situation by revising the Investment Code in September 2008. The revised code strengthened the rights of investors (including re-expression of equal rights for foreign investors), and introduced a tax credit for all investors, equal to 30% of the amount invested. However, until now there has been no progress in de-regulation. The vast cash flows involved in the trafficking of narcotics have ensured that well intentioned anti-corruption measures have so-far had nil apparent effect until now (with Guinea Bissau ranked 162 out of 180 countries in terms of level of corruption as perceived by business operators).

These findings are borne out by anecdotal evidence from European fisheries operators who have investigated the possibility of investment in Guinea Bissau. Not only is the business environment onerous (corruption, lack of power supply, weak infrastructure, high costs etc) but the ongoing non-compliant sanitary conditions and lack of access to the EU market for fishery products of Guinea Bissau origin continues to be a significant barrier to any investments which aim to exploit the fishery potential of the country.

#### 1.4.6 Poverty and Employment

Guinea-Bissau is one of the poorest countries in the world, with incomes of more than two thirds of the population falling below US\$ 2/day and more than 21% below US\$ 1/day. Nearly two-thirds of the population was living in poverty in 2002 and the majority of people believe that their poverty situation has worsened since then. This is confirmed by World Bank simulations of changes in poverty after 2002 as related to growth in GDP per capita. These simulations suggest that the number of those in poverty may have increased from 66% in early 2002 to 72% by the end of 2005.

The majority of the extremely poor live in rural areas; almost three-quarters of the poorest third of Guineans earn their primary income from agriculture (including fisheries) and almost all of the remainder list agriculture as their second most important source of income.

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IMF estimates that active population in Guinea Bissau is about 600,000 people from which 80% (480,000 people) work in agriculture and only 4% in public administration. Unemployment is high everywhere, particularly amongst the young. The latest unemployment rates of young people aged between 15 and 24 for 2006 are 47% in Bissau and 19% in rural areas.

Small scale fishing by the population of Guinea-Bissau has traditionally been a marginal activity—mainly to complement agricultural activities, or as a means of subsistence often used to supplement consumption and incomes (particularly important in times of poor rice harvests and during the dry season). However, a more professional level of artisanal fishing is also practiced by coastal communities comprising resident immigrant fishers, many from Senegal. More information on fisheries employment is provided in section 2.5.1.

#### 1.4.7 Port and maritime transport

The Port of Bissau, the country's only international port, is responsible for 85% of exports and more than 90% of imports. Established in 1964 the port is managed by the government entity of Administração dos Portos da Guiné Bissau (APGB). The APGB acts as a landlord authority managing regulatory and infrastructural areas.

The port is handling four times its capacity of container traffic. It is poorly managed and has an estimated double the number of workers required, nearly all poorly trained. The port is in a general state of decay. The main physical problems with the port of Bissau stem from neglect over many years. These can be summarized as insufficient capacity, inadequate container equipment, insufficient depth of port and approaches, and lack of navigational aids. In 2006 the port was cleaned up with the assistance of the Spanish government and the Port of Las Palmas (11 of the 14 boats that had sunk in the area were removed at a cost of US\$ 256,000). However, at the present time it has been 36 years since the port was dredged with the result that the water depth has been reduced to 3-4 meters. This limits the size of the ships that can enter to 20,000 tons. At the current rate of silting, the port will soon be inaccessible to most freighters, cutting off the country from direct access to international maritime trade.

The inefficient port services increases the cost of all goods, and significantly reduces competitiveness of country's international trading position. The port of Bissau is therefore in need of rehabilitation.

In 2008 the World Bank's private sector rehabilitation and development project addressed this need this by supporting APGB in undertaking:

- o diagnosis to assess the feasibility of a public-private partnership for the port and options to be considered
- o staffing analysis;
- o 5 years financial and operational analysis
- o evaluation of value and condition of existing infrastructure and equipment, investment plan, tariff proposals, new stevedores remunerations, budget, etc.

A two-phase 10 year master plan was prepared aiming to restructure the Guinea Bissau Ports Authority, including policy, regulations and legal framework. Access roads to the port were paved using resources of the port authority. This is essential for adequate traffic flow, particularly for the peak periods during the cashew harvest. In 2008 work was in progress to demolish some old warehouses in order to make way for additional areas in which to store containers. However, until now there have been no positive steps regarding implementation of meaningful institutional reform.

In the meanwhile Bauxite Angola signed an agreement with the government in May 2009 to build and manage a second deep-water port at Buba. When completed in 2011, Buba will become an important trade hub for Senegal, Mali and Guinea-Conakry. Bauxite Angola is

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also financing 110 kilometres (km) of railway from the mines to Buba port. A fishing port is planned to open in Bandim in 2011 that will also help to diversify rural revenues away from an overdependence on cashew.

The implementation in 1998-2000 of the Common External Tariff in the francophone West African Economic and Monetary Union (UEMOA) entailed significant declines in trade taxes in the region. Furthermore new bridges and upgrading of roads linking Guinea-Bissau to ports in Senegal and The Gambia have been completed. Port costs are significantly less in these countries. Table 7 shows that handling charge in Banjul are EUR84/tonne less than Bissau. Unless these trends are reversed, at least until new ports are developed, Guinea Bissau is likely to become a coastal country which depends on other countries for access to the sea.

**Table 7: Comparison of West African Port Costs**

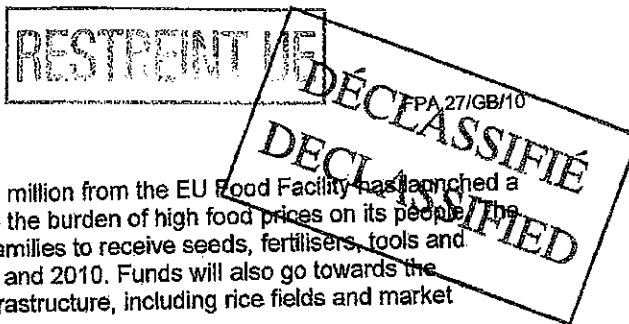
	20 ft Container EUR / ton	Average Freight Cost EUR	Port Cost EUR	Tax EUR	Total EUR
Guinea-Bissau	68 - 86	77.3	41.0	59.4	177.7
Nigeria	32 - 36	34.2	28.8	0.0	62.9
Ivory Coast	40 - 50	45.0	28.8	22.3	96.4
Benin	40 - 43	41.4	23.7	0.0	65.1
Ghana	32 - 36	34.2	18.0	0.0	52.2
Senegal (Zig)	68 - 86	70.1	25.9	0.0	96.4
Senegal (Gambia)	68 - 86	70.1	48.9	0.0	119.4
Gambia	68 - 86	70.1	15.1	7.6	92.8

Source: African Cashew Alliance  
2009 EUR – USD Conversion Rate used

#### 1.4.8 Food Supply

Although the country boasts good soil and growing conditions, agricultural output has been poor and food shortages frequent, owing largely to a lack of inputs and expertise and weakened infrastructure. Erratic weather – from insufficient rainfall to flooding to bush fires – has also been a factor. Most smallholder farmers in Guinea-Bissau do not produce enough rice to feed their families throughout the year, and rural populations need to buy imported rice to supplement their own production. The food security situation in Guinea Bissau is highly sensitive to changes in rural incomes, and therefore, given the export dependency on cashew, on prices and demand for this crop.

In 2010, according to the FAO Global Information and Early Warning System, the food supply situation had improved significantly, due to increased cereal production (up 4% in 2009), falls in inflation in 2009 thanks to lower food prices, and improved marketing (with increased exports) of cashew, the main source of cash income for rural households. According to FAO, per capita fish consumption is just 2.1 kg/year, based on a supply of about 2,400 tonnes. However, this could be a significant under-estimation. A survey in 2010 estimated production from artisanal fisheries to be 20,118 tonnes in 2009, which would suggest a more realistic per capita consumption of 14.8 kg/year. Whilst rice, maize and millet contribute some 83% of the average 40.7g of protein consumed per day in 2004, fish is therefore likely to have contributed almost all of the animal protein in the diet. Catches from the small scale fishery, supplemented by landed bycatch from the industrial fishery, should therefore be considered to provide a critical contribution to the food security of the country.



The World Bank and the FAO with c. EUR 3 million from the EU Food Facility has launched a two-year project in May 2009 to help reduce the burden of high food prices on its people. The objective is for 25, 000 vulnerable farming families to receive seeds, fertilisers, tools and training to increase their output during 2009 and 2010. Funds will also go towards the rehabilitation of the country's agricultural infrastructure, including rice fields and market garden plots.

## 1.5 Membership of regional bodies

Guinea-Bissau is a member of several regional and multilateral arrangements. These include the West African Economic and Monetary Union (UEMOA), Economic Community of West African States, (ECOWAS) WTO, and the Community of Portuguese-Speaking Countries (CPLP)

In 1997, Guinea-Bissau joined the West African Economic and Monetary Union (UEMOA) created in 1994 among 7 West African member countries of the Franc zone (Benin, Burkina, Côte d'Ivoire, Mali, Niger, Senegal and Togo). Entry into UEMOA also entailed adoption of the CFA Franc, a common currency linked to the Euro (to the French Franc before introduction of the Euro in 2002) at a fixed exchange rate of 656 CFAF/ Euro. UEMOA implements a free-trade scheme among member countries for goods which satisfy its rules of origin in addition to a 4-band common external tariff (CET).

Guinea-Bissau is also a founding member of the Economic Community of West African States, or ECOWAS, created in 1975 among 15 West African countries. Among the first objectives to be achieved, the treaty mandated the elimination of tariff and non-tariff barriers among member states and the establishment of a CET and commercial policy towards non-members. Subsequent aspirations include a common market and a single currency. Progress towards achieving the more limited trade integration objectives has been slow, in part because of diverging economic interests among the 15 member countries. But preparation and decision-making, and above all implementation of decisions, have sped up in recent years, with the adoption of an ECOWAS Trade Liberalization Scheme (ETLS) on intra-regional trade. A CET has been under preparation for several years and the lengthy process received additional impetus from the ongoing EPA negotiations as ECOWAS was intent on concluding an EPA as a formal customs union.

Guinea-Bissau is a WTO member, but has not yet undergone a Trade Policy Review. WTO Negotiation strategy maintains the solidarity with other ECOWAS member states, the LDC group, the African Union (AU) and the ACP states.

Guinea Bissau is member of the Community of Portuguese-Speaking Countries (CPLP) which was established in 1996 as a multilateral forum for the strengthening of mutual friendship and co-operation among its members.

In the fisheries sector Guinea Bissau is also member of several regional institutions including the Sub-Regional Fisheries Commission, (CSRFP), and Ministerial Conference on Fisheries Cooperation among African States Bordering the Atlantic Ocean (COMHAFAT).

These are described in more detail in Section 4.

## 1.6 Relations with international donors

With political instability and weak government, Guinea Bissau is highly dependent on external assistance. Net assistance has increased significantly, from USD 81 million in 2006 to 132 million in 2008, accounting for 31% of the Gross National Income. Major donors are the EU (accounting for some 38% of the donor support), the World Bank, and the African Development Bank. The main bilateral donors are Portugal, Spain and France. Figure 2 shows the overall breakdown of support from the international community.

Given the perilous state of public finances, donor support for the state budget has increased. The United Nations Development Programme (UNDP) has been working to help the

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government to establish a common framework for budget support. External partner programmes are broadly aligned with the National Poverty Reduction Strategy.

The country reached the decision point under the Heavily Indebted Poor Countries (HIPC) Initiative in 2000, but never got to completion because of government failure to meet reform targets. The re-establishment of relations with the IMF gives hope that the HIPC process will be resumed in 2011. Despite the concessional nature of most of its debt, Guinea-Bissau is in debt distress, with an external debt level of 227% of GDP at end-2009 in nominal terms. Some 49% of the debt is multilateral and 51% bilateral and (marginally) commercial. The burden of recurrent interest payments is largely carried by the budgetary support from donors.

Co-operation is growing with other developing nations. China's presence has increased in recent years, with infrastructure building in exchange for raw materials. In September 2009 new agreements were signed with China, involving aid worth USD 8.2 million. Angola's presence is also increasing, in terms of assistance for infrastructure development and business, mainly due to the countries' common colonial past and language.

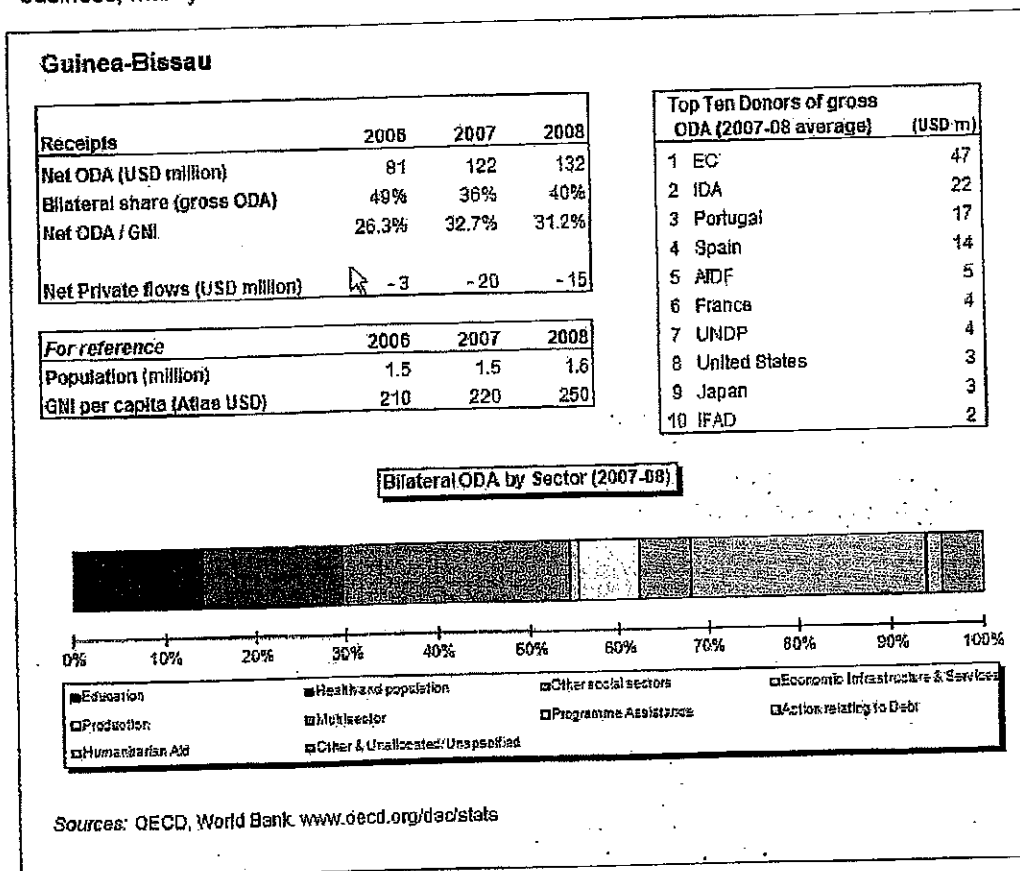
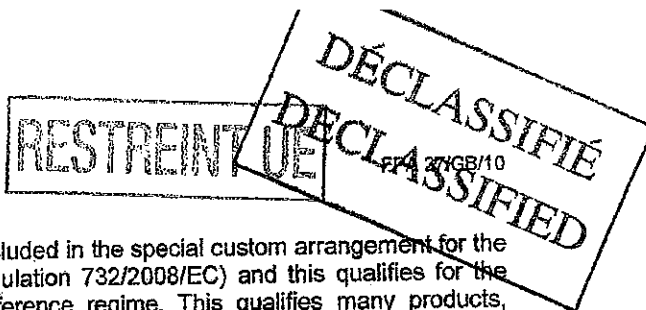


Figure 2: Matrix of overseas development assistance delivered to Guinea Bissau, 2006 to 2008.

## 1.7 Relations with the European Union

### 1.7.1 The EU-Guinea Bissau cooperation strategy

Like other ACP states, Guinea-Bissau is a signatory of the Cotonou Agreement with the EU. Guinea Bissau is therefore a beneficiary of the European Development Fund (EDF). The development assistance, policy and programme are described below.



Guinea Bissau is also one of the countries included in the special custom arrangement for the least developed countries (Article 11 of Regulation 732/2008/EC) and this qualifies for the GSP EBA (Everything But Arms) tariff preference regime. This qualifies many products, including fishery products wholly originating from Guinea Bissau, to enter the EU at preferential tariff rates. However, in the case of fishery products, Guinea Bissau has not been able to take advantage of this benefit for several years due to ongoing non-compliance with Community food safety rules.

### 1.7.2 Economic Partnership Agreement

The Cotonou Agreement recognised that within the WTO rules regarding tariff preferences, the trade relations between the ACP states and the EU would need to be renegotiated before the end of December 2007, replacing them with Economic Partnership Agreements. To satisfy WTO requirements, EPAs will be based on reciprocal (but asymmetrical) trade relationships. EPA negotiations take place within self-determined negotiating groups: Guinea Bissau elected to join the UEMOA regional group for the negotiation of a regional Economic Partnership with the EU.

Under the EPAs, the EU offers signatory states immediate tariff and quota free access to its market, while signatory states will grant duty free access to at least 80% of imports from the EU, to be implemented over an extended transition period of up to 15 years. Twenty% of imports from the EU can remain on the exclusion list (goods not be liberalized) even at the end of the transition period.

The *Union Economique et Monétaire Ouest Africaine*, comprising, Benin, Burkina Faso, Cote d'Ivoire, Guinea Bisau, Mail, Noger, Senegal and Togo (UEMOA) and the EU have since 2003 been engaged in the preparation and negotiation of the Economic Partnership Agreement (EPA). Current EPA negotiations focus on:

- strengthening regional integration;
- prioritising development and enhancing the region's development program;
- enhancing competitiveness (e.g. capacity-building for West African companies and exporters);
- strengthening the integrity of agricultural sector;
- alternative funding for net transitional and tax offsetting costs;
- inclusion of a regional list for sensitive West African products.

Negotiations towards a full regional EPA are continuing in 2010. A technical meeting was held between the parties in June 2010 in Ouagadougou, with a chief negotiators' meeting to follow later in the year. The main outstanding issues in the negotiations relate to the West African market access offer on trade in goods, Most Favoured Nation tariffs, rules of origin and the question of the Community levy.

In addition the West Africa regional groups (CEDEA/ECOWAS and UEMOA) have proposed an EPA development programme (EPADP/PAPED) to address the development needs arising from an EPA, which it aims to include in the EPA as an annex. The programme is aimed at supporting the West African region to draw full benefit from the opportunities offered by the EPA, and to reduce its negative effects. The EPA-DP focuses on the following five strategic aims:

- Diversification and increase of production capacities;
- Development of intra-regional trade and facilitation of access to the global market;
- Improvement and strengthening of trade-related national and regional infrastructures;
- Realisation of indispensable adjustments and consideration of other trade-related needs;

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- o EPA implementation and monitoring.

The PAPED was initially estimated by West Africa at EUR 9.5 billion over the next five years. On the 10th of May 2010, in the form of a Council Conclusion the EU ministers of development outlined their support, proposing an EU contribution of EUR 6.5 billion. Agritrade suggests that "ECOWAS and UEMOA however do not seem completely satisfied by the EU's response".

### 1.7.3 National Indicative programme for development cooperation

The National Indicative Programme, sets out the development cooperation strategy under the 10<sup>th</sup> EDF and was adopted by the parties for the period 2008 to 2013. It is substantially to support the DENARP, and the achievement of the Millennium Development Goals (MDGs) in Guinea Bissau. The NIP centres on two focal sectors and on direct budgetary support amounting to Euro 100 million of programmable aid.

- o Focal sector 1: Conflict prevention in fragile States – Euro 27 million. The country's weaknesses remain the excessive size of its security forces and its administration, the inefficiency of its judicial system, and corruption. Reform in these areas is therefore a priority.
- o Focal sector 2: Water and energy – Euro 26 million. Development in this sector has been identified as an essential prerequisite in order to promote economic and social development.

In addition the NIP allocates direct budgetary support of Euro 32 million during the period 2008 to 2011, the main purpose of which is to achieve macro-economic stability in order to further stabilise public finances. It will be accompanied by institutional support and is expected to evolve towards budgetary aid with more general objectives (to be reassessed on the occasion of the mid-term review). In 2009, this support accounted for Euro 20.95m, representing 16% of the budgeted income of the state budget.

### 1.7.4 Regional indicative programme

Guinea Bissau is also a beneficiary of interventions supported under the 10<sup>th</sup> EDF Regional Indicative Programme for Africa. The EU-Africa summit, held in December 2007 in Lisbon cemented new Africa-EU strategic partnership, marking a qualitative leap in relations between the two continents. Within this partnership its first action plan specifies concrete proposals for 2008-2010 structured along 8 Africa-EU strategic partnerships:

- o Peace and security
- o Democratic governance and human rights
- o Trade, regional integration and infrastructure
- o Millennium development goals (MDGs)
- o Energy
- o Climate change
- o Migration, mobility and employment
- o Science, information society and space.

Together with the political Lisbon Declaration these axes will guide EU-Africa dialogue and cooperation in the coming few years in line with the principles of African ownership, co-management and co-responsibility.

Note that one of the main stated objectives of the EU relations with Africa is to promote the achievement of the UN MDGs in Africa. This objective is strengthened and complemented by the specific objectives pursued within the Cotonou Agreement, the Trade Development and Cooperation Agreement (TDCA), the Euro-Mediterranean partnership and the European neighbourhood policy including the support to political reform and economic modernisation.

At the regional level, with regard to the EU's partnership with West Africa, the main priority for the 10th EDF 2008-2013 are detailed in the Regional Strategy Paper and the Regional Indicative Programme, approved by the EU and the West African States, represented by

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ECOWAS and UEMOA in December 2008. The total EDF allocation to the RIP is EUR 597 million and the priorities are set in line with the ECOWAS and UEMOA objectives and comprise:

- Focal Sector I: Deepening regional integration, improving competitiveness and EPA (70% of total: EUR 418 million)
- Focal Sector II: Consolidation of good governance and regional stability (20% of total: EUR 119 million)
- Non-Focal Sector (other programmes) (10% of total: EUR 60 million)

Support for deeper regional integration (Focal Sector 1) includes strengthening regional food security, as well as support for EPA programmes for improved competitiveness which includes compliance with TBT and SPS measures. Focal sector 2 will include strengthened governance, especially at a regional level and improved policies and management in relation to human migration. The Non-focal areas cover a range of issues considered to be vital strategic interest. These include

- Environment (including environmental impact assessments and profiles, bio-security, climate)
- Climate change the control of coastal erosion and cross-border areas
- Follow-up and management of the RIP including ad hoc technical assistance
- Support for non-state actors
- Continuation of programmes under way

The main elements with regard to trade are the deepening of regional integration, and enhancement of competitiveness linked to the EPA negotiations. This focal area is divided into the following components:

- Support for the implementation of reforms and adjustments related to the establishment of the UEMOA customs union and the common market (including the free movement of people and of capital) and the consolidation of macroeconomic stability. Actions related to the customs union include the implementation of the CET, trade facilitation and the modernisation of the customs administration;
- Support for implementation of the EPA including application of rules on sanitary and phytosanitary measures (SPS), technical barriers to trade (TBT), intellectual property, competition, public procurement, investment, and services. The competitiveness of the productive sector should be strengthened, food security should be increased at the regional level and the institutional capacities of regional organisations should be improved.

For the ECOWAS region funds available within the RIP for trade capacity building and regional integration amount to some 70% of the total regional indicative programme.

### 1.7.5 The European Investment Bank

The National Indicative Programme and the Country Strategy Document foresee that the EIB may contribute to the implementation of the programme through the financing of an investment facility and/or through its own resources within the rules of the 10<sup>th</sup> EDF under the ACP-EU partnership accords. The EU Infrastructure Trust Fund for Africa is a new co-financing instrument of the EU-Africa Partnership on Infrastructure. It brings together the resources of the EU, the Member States, the European Investment Bank (EIB) and European



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Development Financing Institutions in the creation of an Infrastructure Trust Fund<sup>2</sup> This is able to provide grants for:

- interest rate subsidies
- technical assistance including preparatory work for eligible projects such as environmental impact assessments, project supervision and targeted capacity building.
- direct grants for project components that have a substantial demonstrable social or environmental benefit
- initial stage funding of insurance premium necessary to ensure the launch of infrastructure projects.

Eligible investments are those in the energy, transport, water, IT and telecommunications sectors. The Trust has established a secretariat as an access point for and liaison with all Partnership stakeholders. EUR 5.6 billion has been allocated from the 10th European Development Fund (2008-2013). The EIB is responsible for the management of the fund. A number of marine infrastructure projects have already been financed, such as the Walvis Bay Container Terminal in Namibia and the Beira Corridor in Mozambique. Until now, no investments in Guinea Bissau have been made.

## 2 REGIONAL AND NATIONAL FISHERY RESOURCES

The EU Guinea Bissau Fisheries Partnership Agreement concerns fishing opportunities for both highly migratory species and for demersal species. The main target species concerned are:

### Highly migratory pelagic species

- Two species of tuna caught by purse seiners and pole and line vessels (yellowfin tuna - *Thunnus albacares* and skipjack tuna - *Katsuwonus pelamis*) with a bycatch of juvenile bigeye tunas (*Thunnus obesus*)
- Swordfish (*Xiphias gladius*) and sharks (principally shortfin mako shark - *Isurus oxyrinchus* and blue shark - *Prionace glauca*) potentially caught by surface longline vessels<sup>3</sup>.

### Demersal species:

- Deepwater shrimp (principally *Parapenaeus longirostris*)
- Shallow water shrimp (*Penaeus spp.*)
- Cephalopods such as the common octopus (*Octopus vulgaris*), and the common cuttlefish (*Sepia officinalis*),
- Demersal fish species such as breams (*Sparidae*), soles (*Solea spp*) grunts and sweetlips (*Haemulidae*), the sea catfishes (*Ariidae*), and croakers and drums (*Sciaenidae*).

<sup>2</sup> See <http://www.eu-africa-infrastructure-tf.net/>

<sup>3</sup> Note that since surface longline opportunities within this agreement have not been taken up by EU vessels, this review of fisheries resources has excluded the target species of this fleet segment (swordfish and sharks).

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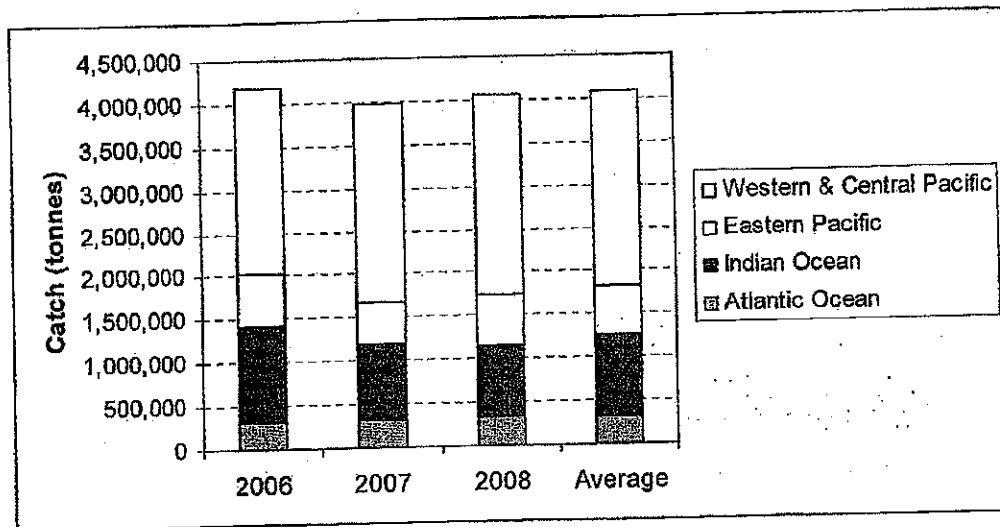
This section considers the dimensions and dynamics of these stocks, and the sustainability of the fishing effort applied to them.

## 2.1 Highly migratory species in the Eastern Tropical Atlantic

### 2.1.1 Overview

World catches of the three major tuna species (skipjack, yellowfin and bigeye), for all types of gears combined, totalled over 4 million tonnes on average over the 2006-2008 period (Figure 3). The Western and Central Pacific area is the main fishing ground for tunas, with 56% of world catches on average, ahead of the Indian Ocean (23%), the Eastern Pacific (14%) and the Atlantic Ocean (8%).

Considering the ICCAT Convention Area, in which the Guinea Bissau fishery falls, the total catch in migratory species in 2008 was estimated at 499,438 tonnes, which includes tuna species and billfishes. The ICCAT Convention Area spans a large proportion of the Atlantic Ocean where most of these catches are taken, while about 12% on average (2006-2008) are taken in the Mediterranean (also part of the ICCAT area). The major tuna species (skipjack, yellowfin and bigeye) accounted for almost 320,000 tonnes of the global total (61%).



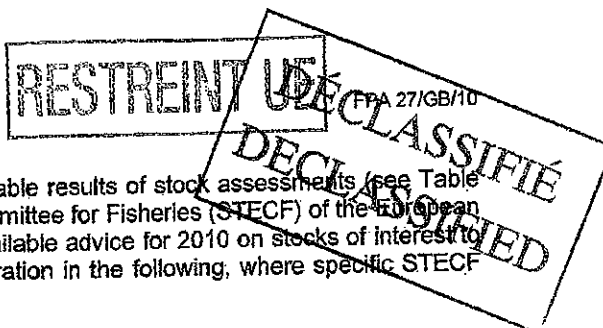
Source: FAO

**Figure 3 : Distribution of world catches of skipjack, yellowfin and bigeye 2006-2008**

### 2.1.2 Status of stocks and management measures

Stock assessments of major tunas and associated species such as various billfish and sharks are carried out regularly (i.e. every 3-4 years) under the framework of the International Commission for the Conservation of Atlantic Tunas (ICCAT). This section describes the various stocks that are of particular relevance to the EU Guinea Bissau FPA, with a focus on the stocks that are exploited in the eastern tropical Atlantic. It considers their exploitation and biological status in terms of the sustainability of the fishery and describes the management advice provided by ICCAT.

The source of this information is the report of the ICCAT Standing Committee of Research and Statistics (SCRS) included in the Report for Biennial period 2008-09, Part II, published in



2010<sup>4</sup>. This publication includes the latest available results of stock assessments (see Table 4). The Scientific, Technical and Economic Committee for Fisheries (STECF) of the European Commission is also requested to review the available advice for 2010 on stocks of interest to the EU. This has also been taken into consideration in the following, where specific STECF comments or recommendations are given.

The European Union as a party to the ICCAT Convention is obliged to implement the ICCAT Recommendations, Resolutions and other Decisions. Reference is therefore also made to the implementing decisions adopted into EU law by the European Council and the European Commission.

### Skipjack

Skipjack tuna is a gregarious species that is found in schools in the tropical and subtropical waters of the three oceans. Skipjack is the predominant species caught under FADs (fish aggregating devices/floating objects, which can be natural or artificial) where it is caught in association with juvenile yellowfin and bigeye tuna as well as with other species of epipelagic fauna. One of the characteristics of skipjack is that from the age of one it spawns opportunistically throughout the year and in vast sectors of the ocean. The increasing use of fish aggregation devices (FADs), since the early 1990s, has changed the species composition of free-swimming schools. It is noted that the free schools of mixed species were considerably more common prior to the introduction of FADs.

The total catches of this species obtained in 2008 in the entire Atlantic Ocean were close to 149,000 tonnes which represents the catch average of the last five years (Figure 4). At present the major fisheries are the purse seine fisheries, particularly those of Spain, Ghana, Panama, France and Netherlands Antilles, followed by the baitboat fisheries of Ghana, Spain, Portugal and France. The preliminary estimates of catches made in 2008 in the East Atlantic amounted to 127,000 tonnes representing an increase of 3% as compared to the average of 2003-2007. Most of the catches are taken off the coasts of Ghana and Cote d'Ivoire with much lower catches in the Guinea Bissau zone, as this area is in the northern limit of the purse seine fishery (Figure 6). Nominal purse seine effort decreased regularly since the mid-1990s but this has now started to increase again with the movement of EU purse seiners from the Indian to the Atlantic Ocean.

Traditional stock assessment models have been difficult to apply to skipjack because of their particular biological and fishery characteristics (i.e. continuous spawning, variation in growth by area, non-directed effort and weakly identified cohorts). Although the fisheries operating in the east have extended towards the west beyond 30°W longitude, assessment is based on the assumption of two distinct stock units, east and west, based on available scientific studies. European fisheries primarily exploit the eastern stock, which is the much larger stock.

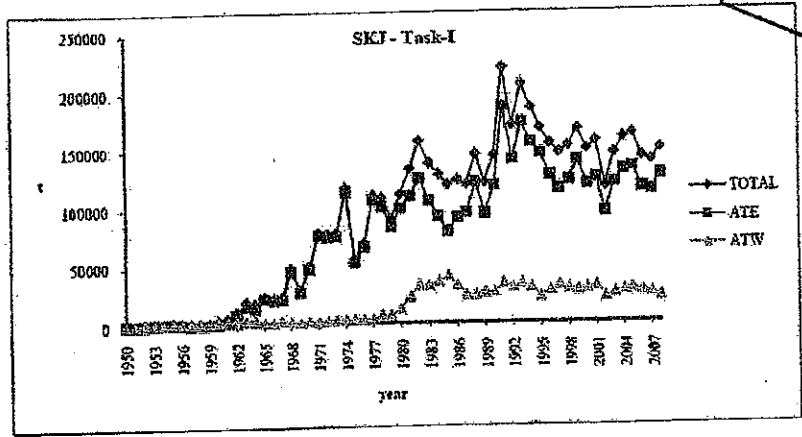
Current catches (2008 provisional data) of eastern skipjack are about 127,000 tonnes, which is lower than the Maximum Sustainable Yield (MSY) level; range of 143,000 – 170,000 tonnes (see Figure 5). This indicates a moderate exploitation and the fishery can thus be considered as sustainable. There is currently no specific regulation in effect for skipjack tuna.

Although the ICCAT SCRS Committee makes no management recommendations in relation to skipjack, the advice is that catches should not be allowed to exceed MSY. Increasing harvests and fishing effort for skipjack could lead to involuntary consequences for other species that are harvested in combination with skipjack (particularly bigeye tuna in the purse seine fishery).

<sup>4</sup> Available at [www.iccat.int](http://www.iccat.int)

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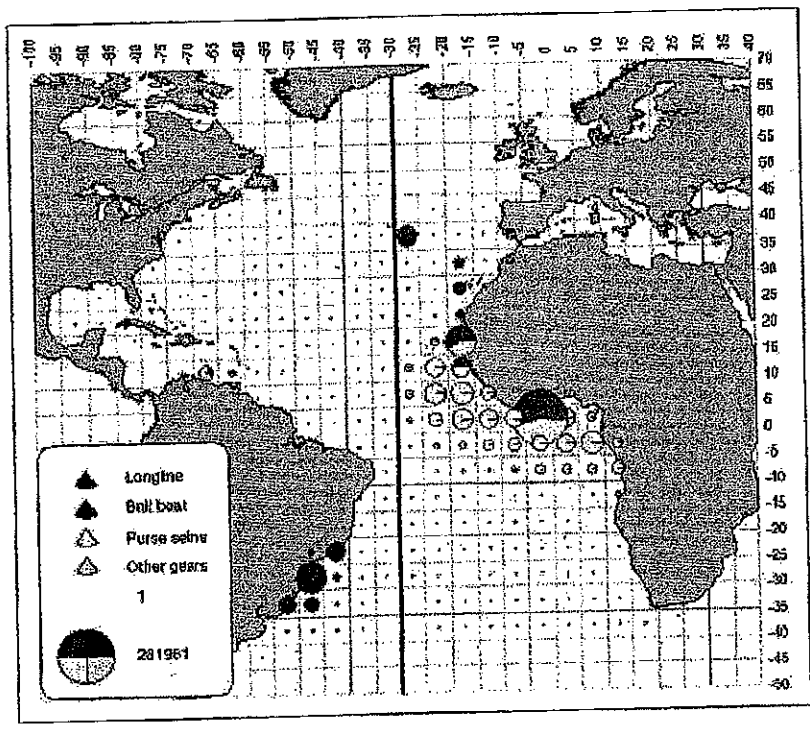
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Source: ICCAT

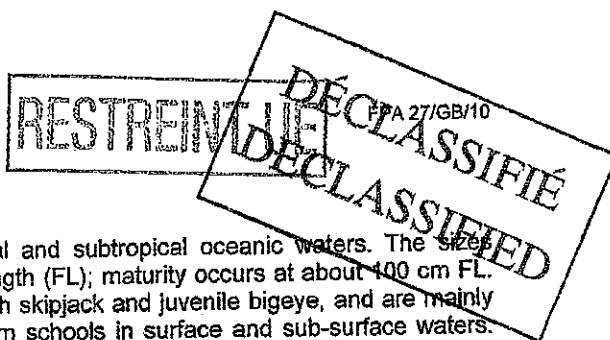
**Figure 4: Total catch (t) for skipjack in the Atlantic Ocean and by stocks (East and West) between 1950 and 2008.**

The STECF comments on the ICCAT management measure of a season/area closure for surface fisheries (i.e. purse seine, baitboat) (Rec. 04-01), replacing the previous moratorium on the use of FADs over a larger area (see Table 4). This season/area closure was assessed by ICCAT and the conclusion was that it is less efficient in reducing the overall catches of small bigeye, the primary objective of the management measures, and has only a marginal effect on skipjack catches. STECF comments imply that a more effective measure should be found for protecting juvenile bigeye in the surface fisheries.



Source: ICCAT

**Figure 5: Geographic distribution of skipjack catch by major gears during the period 2000-2007.**



### Yellowfin tuna

Yellowfin tuna is distributed mainly in tropical and subtropical oceanic waters. The size exploited range from 30 cm to 170 cm fork length (FL); maturity occurs at about 100 cm FL. Smaller fish (juveniles) form mixed schools with skipjack and juvenile bigeye, and are mainly limited to surface waters, while larger fish form schools in surface and sub-surface waters. The younger age classes of yellowfin tuna exhibit a strong association with FADs. The main spawning ground is the equatorial zone of the Gulf of Guinea, with spawning primarily occurring from January to April. Juveniles are generally found in coastal waters off Africa. In addition, spawning occurs in the Gulf of Mexico, and in the southeastern Caribbean Sea, although the relative importance of these spawning grounds is unknown. Although such separate spawning areas might imply separate stocks or substantial heterogeneity in the distribution of yellowfin tuna, a single stock for the entire Atlantic is assumed as a working hypothesis based on the available information, showing transatlantic migration from west to east and a continuous distribution based on CPUE data (Figure 6).

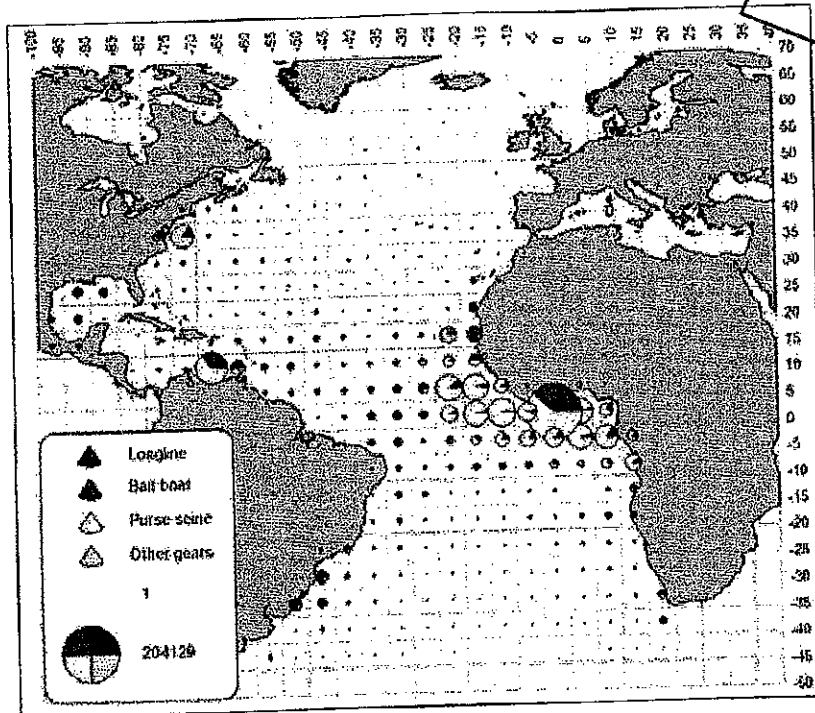
In contrast to the increasing catches of yellowfin tuna in other oceans worldwide, there has been a steady decline in overall Atlantic catches, with an overall decline of 45% since the peak catches of 193,500 tonnes in 1990 to 107,859 tonnes in 2006 (Figure 7). Recent trends have differed between the western and eastern Atlantic, with the catches in the west continuing to decline steeply with reductions of 40% in only two years since 2006. In the eastern Atlantic, on the other hand, catches have increased by 13% since 2006 mainly due to substantial increases in purse seine effort. Most of these catches are taken off the coasts of Ghana and Cote d'Ivoire, as shown in Figure 6. Note that the catches in the Guinea Bissau zone are relatively low.

The status of the yellowfin tuna stock has shown some improvement in recent years, which is not surprising in that fishing effort and subsequent catches have generally declined. The recent increase in effort in the Eastern Atlantic is still considered to be relatively moderate. The estimated maximum sustainable yield (MSY) range is 124,000 to 152,000 tonnes per year. As catches in 2008 were 107,859 tonnes (provisional data), well below the MSY, the level of exploitation is considered moderate and yellowfin tuna is considered to be exploited sustainably.

The formal management advice is contained in "Recommendation by ICCAT on Supplemental Regulatory Measures for the Management of Atlantic Yellowfin Tuna" of May 31, 1994. This states that "there be no increase in the level of effective fishing effort exerted on Atlantic yellowfin tuna, over the level observed in 1992". It also requires that all countries whose vessels currently exploit Atlantic yellowfin tuna, or may do so in the future, irrespective of whether or not such vessels fly a flag of the Contracting Parties to the ICCAT Convention, implement the measure.

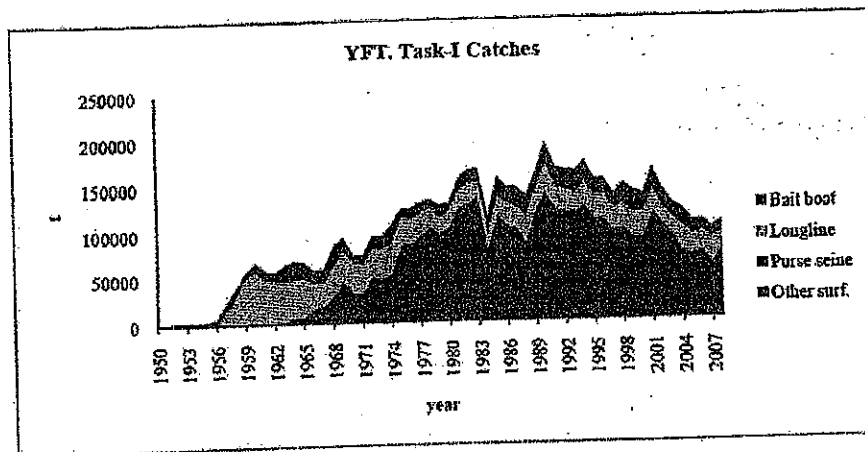
The latest stock assessment in 2008 estimated that current effort level is well below this limit (about 25-30% in terms of fishing mortality up until 2006), but considering recent increases in vessels, this may no longer be the case. The SCRS Committee of ICCAT points out that there is about a 60% chance that stock biomass is not at the optimal target level, when taking into account uncertainty in the modelling exercises. The effect of the recent trend for movement of additional, newer vessels from the Indian Ocean into the Atlantic, with a corresponding increase in fishing mortality should therefore be monitored closely to avoid adverse impacts on stock status, a recommendation that is also endorsed by the STECF.

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Source: ICCAT

Figure 6: Geographic distribution of yellowfin catch by major gears during the period 2000-2007



Source: ICCAT

Figure 7: Estimated annual catch (tonnes) of Atlantic yellowfin tuna by fishing gear. 1950-2007

**Bigeye**

Bigeye tuna are distributed throughout the Atlantic Ocean between 50°N and 45°S, but not in the Mediterranean Sea. This species swims at deeper depths than other tropical tuna species and exhibits extensive vertical movements. Spawning takes place in tropical waters when the environment is favourable and juvenile fish tend to diffuse from nursery areas in tropical waters into temperate waters as they grow larger. Catch information from surface gears indicate that the Gulf of Guinea is a major nursery ground for this species. Young fish form

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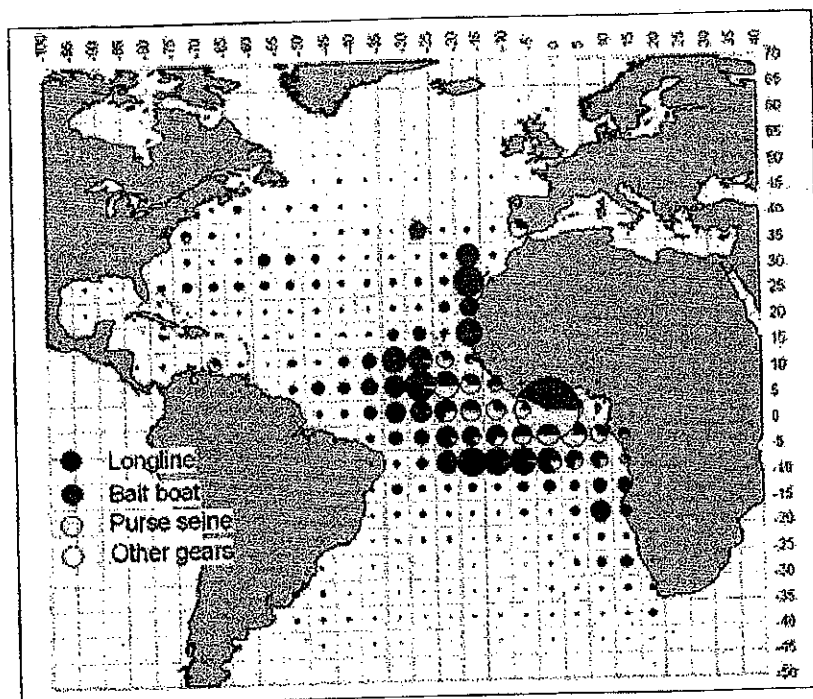
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schools mostly mixed with other tunas such as yellowfin and skipjack. These schools are often associated with drifting objects, whale sharks and sea-mounts. This association appears to weaken as the bigeye grows larger. A single Atlantic-wide stock is assumed for the purpose of stock assessment.

The stock has been exploited by three major gears (longline, baitboat and purse seine fisheries) and by many countries throughout its range of distribution. The size of fish caught varies among fisheries; medium to large for the longline fishery, small to large for the directed baitboat fishery and small for other baitboat and for purse seine fisheries. The main purse seine fisheries are off the coasts of Ghana and Cote d'Ivoire. Only relatively small catches are reported for the ICCAT square in which Guinea Bissau is located (Figure 8).

Figure 9 shows the catch trends for this species. After the historic high catch in 1994 (132,000 tonnes) all major fisheries for this species exhibited a decline of catch. Bigeye catches declined to 65,873 tonnes in 2006 and provisional estimate for 2008 is 69,821 tonnes. These reductions in catch are related to declines in fishing fleet size (purse seine and longline) as well as decline in CPUE (longline and baitboat). However, in 2007 and 2008 an increase in the number of tropical purse seiners has been observed and this trend continued in 2009.

Bigeye tuna is of commercial interest for longliners supplying the Asian sashimi market. Since the early 1980s it has been the target of illegal, unreported and unregulated (IUU) longliners flying flags of convenience. IUU longline catches of this species were estimated at 25,000 tonnes in 1998 but have since declined reflecting improved reporting and reductions in the number of IUU boats flying flags of convenience. Nevertheless, the SCRS Committee of ICCAT continues to remain concerned that IUU bigeye catches may continue to be significantly under-estimated.



Source: ICCAT

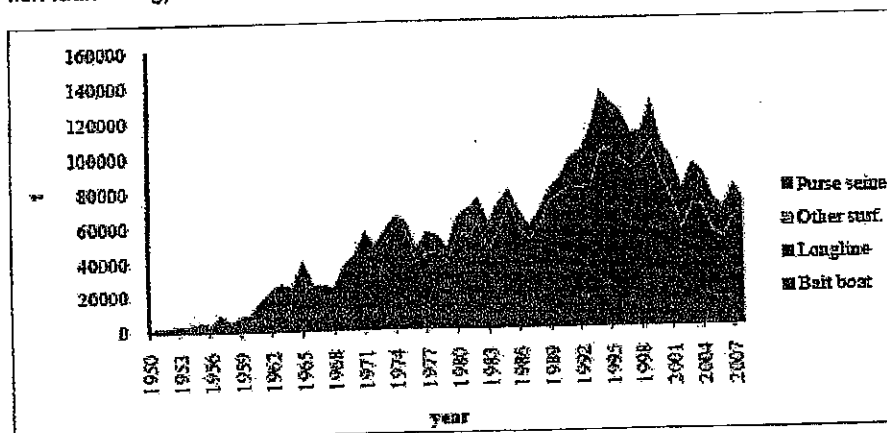
**Figure 8: Geographic distribution of bigeye catch by major gears during the period 2000-2006**

The stock assessment of bigeye tuna indicates that the stock declined rapidly during the 1990s due to the large catches taken in that period. Recently stock size appears to have

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stabilized. Catches in 2008 (provisional data) were about 70,000 tonnes, which is within the estimated sustainable range for MSY of 68,000 to 99,000 tonnes (Figure 9). This implies that the bigeye stock is exploited sustainably. However the SCRS Committee points out that this is conditional on the veracity of the reported and estimated history of catch for bigeye in the Atlantic. There is concern that unreported catches from the Atlantic might have been, and continue to be, poorly estimated. However, available statistical data collection mechanisms are insufficient to fully investigate this possibility (due to for example undeclared landings and fish laundering).



Source: ICCAT

**Figure 9: Estimated annual catch (t) of bigeye tuna by fishing gear (1950-2007)**

There are several management measures in place in order to limit the fishing mortality of bigeye tuna. There are limits on the number of fishing vessels that may carry out a directed fishery for bigeye, where the upper limit is the average number of vessels in 1991/1992 larger than 24m LOA (Rec. 98-03). In the case of bigeye, this refers to longline fleets primarily but there are also limitations on total allowable catch as well as on the number of purse seiners allowed to operate by some distant-water fishing nations (Rec. 04-01; Rec. 09-01).

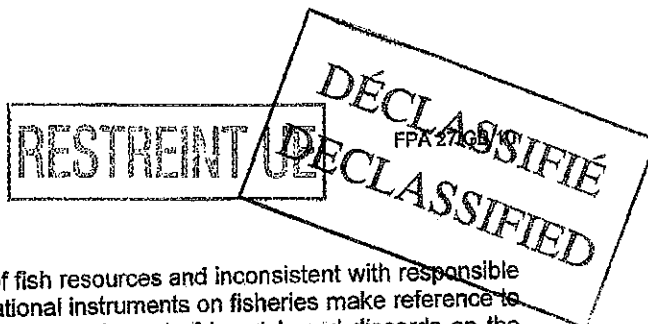
Furthermore, there is a specific seasonal/area closure that applies to the surface fishery, including purse seiners and baitboats, during November (Rec. 04-01). This seasonal/area closure is much smaller in time and surface compared to a previous moratorium which was in effect during the period 1999 to 2005 (Rec. 99-01). Thus the current regulation is considered to be less effective in reducing the catches of juvenile bigeye (i.e. the main objective of the regulation), but on the other hand, the decreases in the associated catches of skipjack and yellowfin tuna are not as large. As current catches appear to be below the maximum sustainable yield (MSY), such a reduced effectiveness does not appear to be of concern, but the bigeye situation should be monitored carefully, considering recent increases in purse seine effort as well as the extent of IUU fishing. It is important to note that this seasonal/area closure does not affect the Guinea Bissau area which is further to the north.

### 2.1.3 Ecosystem considerations (migratory species)

ICCAT is becoming increasingly concerned regarding the impact of fishing on the environment. The Working Group on the Future of ICCAT is taking into consideration the amendment of the ICCAT Convention by including the ecosystem considerations such as for example by-catch impacts. Discussions are ongoing to identify a range of goals for the Convention area ecosystem components: the need for models which incorporate best knowledge of ecosystem dynamics and account for the identified goals; to identify critical data gaps and ecological processes; and guide research and data collection needed for testing and implementation of ecosystem-based fisheries management.

The following summarises some recent research efforts and findings relevant to Guinea Bissau fisheries.





## Discards

Discards are generally considered a waste of fish resources and inconsistent with responsible fisheries. Various UN resolutions and international instruments on fisheries make reference to monitoring bycatch and discards, and reviewing the impact of bycatch and discards on the sustainable use of living resources.

The most comprehensive review of discards in fisheries for tuna and highly migratory species was undertaken by an FAO study in 2005<sup>5</sup>. This presented estimates of discard rates (defined as % of total catch discarded) for several important types of fisheries undertaken in the Guinea Bissau zone.

Baitboat (or Pole-and-line) have an average discard rate of 0.1%, can thus be considered a very clean fishery. Purse seine operators report a discard rate of 4.85% (4.1% for the Atlantic) consisting of undersized target species, non-commercial tunas, sharks, rainbow runner, dolphinfish, triggerfish, billfish and mantas. A recent study of by-catch and discards presented new estimations of discards as well as characteristics for several species groups for the European purse seine tuna fishery operating in the Atlantic Ocean for the period 2003-2007. This was carried out in the context of the French and Spanish observer programs. Mean annual total tuna discards and by-catch were estimated to be about 6,000 tonnes, corresponding to a mean annual value of 76.3 tonnes per 1,000 tonnes of tuna landed. Tuna discards represents 83% (63.5 tonnes/1,000 tonnes) of the total amount, followed by finfishes (10%; 7.8 tonnes/1,000 tonnes), billfishes (4%; 3.2 tonnes/1,000 tonnes) and sharks (1%; 0.9 tonnes/1,000 tonnes). The rather high level of tuna discards appears to be due to a significant increase in the proportion of small skipjack (so-called "faux poisson") in the catch. In 2009, French observers estimated the proportion of small fish (average size 37 cm FL) to be 235 tonnes/1,000 tonnes of skipjack landed.

## Sharks

There are no industrial surface longline fisheries licensed by Guinea Bissau, but there may be some IUU fishing targeting these species. A targeted fishery for shark may also be carried out by Senegalese fishermen deploying long-lines and gillnets. ICCAT has considered the impacts of by-catches of shark species, since these species generally exhibit low productivity and even low by-catches may have a detrimental effect. The quality and quantity of data has been improving to the point where Ecological Risk Assessments (ERA) have been carried out for eleven priority species of sharks (including blue shark and shortfin mako) caught in ICCAT fisheries. The results demonstrated that most Atlantic pelagic sharks have exceptionally limited biological productivity and, as such, can be overfished even at very low levels of fishing mortality. Specifically, the analyses indicated that bigeye threshers, longfin makos and shortfin makos have the highest vulnerability (and lowest biological productivity) of the shark species examined (with bigeye thresher being substantially less productive than the other species). All species considered in the ERA, particularly smooth hammerhead, longfin mako, bigeye thresher and crocodile sharks are in need of improved biological data to evaluate their biological productivity more accurately and thus specific research projects should be supported to that end.

Several measures have therefore been adopted by ICCAT for the conservation of sharks caught in association with ICCAT managed fisheries. This includes obligations and recommendations related to catch reporting, biological data collection, research efforts, prohibiting shark-finning, and identifying blue shark and shortfin mako shark as priority species for stock assessment (Rec. 04-10, 05-05, 06-10). Rec. 07-05 identifies porbeagle (*Lamna nasus*) for the purposes of data collection and stock assessment as well as the need to reduce fishing mortality. Rec. 09-07 prohibits the sale of bigeye thresher sharks (*Alopias superciliosus*) thus limiting any directed fishery and the requirement to release unharmed any

<sup>5</sup> Kelleher, K. 2005. Discards in the world's marine fisheries. An update. FAO Fisheries Technical Paper. No. 470. 131p.

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incidentally caught individuals (when practicable) as well as the specification of the shark species (sharks (*Alopias spp.*) for data collection purposes.

A related effort is the recent European Union Action Plan for the Conservation and Management of Sharks (2009)<sup>6</sup>, which has three specific objectives: a) to broaden the knowledge both on shark fisheries and shark species and their role in the ecosystem, b) to ensure that directed fisheries for shark are sustainable and that by-catches of shark resulting from other fisheries are properly regulated, and c) to encourage a coherent approach between the internal and external Community policy for sharks.

It should also be noted that a Sub-regional Plan of Action for sharks was formulated in 2001 by a number of African countries including Cape Verde, Gambia, Guinea, Guinea Bissau, Mauritania, São Tomé and Príncipe and Senegal<sup>7</sup>. A project has been supporting its implementation (2004-2011), hosted by the Sub-Regional Fisheries Commission (SRFC) for West Africa, with funding from Dutch Cooperation and the Luc Hoffmann Foundation (MAVA). Implementation of the Sub-Regional Action Plan appears to be weak which is also linked to inadequate funding.

### Seabirds

The seabird assessments conducted indicate that ICCAT fisheries have measurable impacts on populations of seabirds in the Convention area, including some species of seabirds that are threatened with extinction. There are various species, primarily albatrosses (*Phoebastria spp.*), shearwaters (*Puffinus spp.*) and petrels (*Pterodroma spp.*), which are threatened according to IUCN criteria and susceptible to by-catch from ICCAT fisheries because of their behaviour<sup>8</sup>. Assessments conducted indicate that minimizing seabird mortality in the ICCAT fisheries would result in improvement in future seabird population status. Lessons from ICCAT areas where seabird by-catch was formerly high but has been reduced show clearly that there is no single measure that can sufficiently reduce seabird by-catch. It is important to employ, simultaneously, a suite of measures. There are concerns particularly in relation to the southern hemisphere (south of 20°S).

The main gears concerned are surface longlines, which may be practiced by IUU vessels in the Guinea Bissau zone. However ICCAT's Sub-Committee on Ecosystems has not been able to demonstrate evidence that there are significant seabird interactions with Contracting Parties' national pelagic longline fisheries. Preliminary estimates indicate by-catches of below 10,000 seabirds per year over a study period of three years; 2003-2005<sup>9</sup>. However, as a precautionary measure, it has advised that Contracting Parties should use tori lines<sup>10</sup> in combination with at least one other effective bycatch mitigation measure throughout the Convention area (adopted in ICCAT Rec. 07-07 for areas south of 20°S). These measures should be applied until such time that more information becomes available on the impacts of by-catch levels on seabird populations.

<sup>6</sup> Communication From The Commission To The European Parliament And The Council, On a European Community Action Plan for the Conservation and Management of Sharks, COM(2009) 40 final, Commission Of The European Communities, Brussels, 5.2.2009

<sup>7</sup> IUCN 2002. Report on Implementation of the International Plan of Action for Sharks (IPOA – Sharks): paper submitted for discussion at the 18<sup>th</sup> CITES Animals Committee meeting, Costa Rica, 8-12 April, 2002. IUCN Species Survival Commissions Shark Specialist Group (SSG) and TRAFFIC

<sup>8</sup> Report of the 2007 Inter-sessional meeting of the sub-committee on ecosystem. ICCAT SCRS/2007/010

<sup>9</sup> Klaer, N.L., Black, A., Howgate, E. 2009. Preliminary estimates of total seabird by-catch by ICCAT fisheries in recent years. SCRS/2008/031

<sup>10</sup> A tori line is a bird-scaring device towed behind the vessel, usually attached from a high point at the stern and consisting of a backbone from which streamers hang down at regular intervals.

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A recent effort in this context is the consultation paper presented by the European Commission on an "EU Action Plan for Reducing Incidental Catches of Seabirds in Fishing Gears". This was under consultation until 9 August 2010<sup>11</sup>. Following the example set by CCAMLR in reducing incidental catches of seabirds in the southern seas, a series of relatively simple techniques are proposed as "best practices" which are not expected to entail significant investments or impacts on catch rates.

### Turtles

Another matter of growing concern is the numbers of turtles being caught in longline fisheries and the impact this might have on their populations worldwide. All species of marine turtles are protected reptiles and are considered to be endangered or threatened. Depending on geographic region, the two species most commonly caught in longlines are loggerhead turtles (*Caretta caretta*) and leatherback turtles (*Dermochelys coriacea*). In the Atlantic most work has been carried out in the western North Atlantic but efforts in the eastern Atlantic appear to have been limited although studies indicate that high catch rates of turtles are observed (about 1 individual per 1,000 hooks set according to Carranza et al. 2006<sup>12</sup>). However considering that the Guinea Bissau zone is not an area of particularly intensive fishing effort by longline, this is not considered to be a serious threat (unlike the situation with demersal trawl fisheries).

Bycatches of turtles in the purse seine fishery are very low (i.e. about 0.1 tonnes estimated from 7 observer trips) but as these species are generally threatened it is a matter for concern. However, it is standard practice to release the turtles back to sea if they are still alive<sup>13</sup>. No study could be found on possible turtle bycatches in the baitboat fisheries, including EU, but this is expected to be negligible due to the nature of the fishery.

### Marine mammals

There is only limited information on marine mammal bycatch, particularly in the eastern tropical Atlantic. Considering recent studies on the bycatch of industrial tuna fisheries (i.e. purse seine and pelagic longline) in the area, catches of marine mammals are not specified at all<sup>14 15</sup>.

## 2.2 Demersal and pelagic species in the Guinea Bissau Zone

Guinea Bissau waters are rich in fisheries resources, this is related to the presence of an extensive continental shelf with shallow depths, seasonal upwelling and significant river flow, all of which contribute to nutrient enrichment of waters and a relatively high productivity. There are also suitable bottom conditions for trawling extending to significant distances from the shore. The 12 nautical mile territorial zone exclusive to the small-scale fisheries extends well into this area due to the forward base points selected in the Bijágos Islands.

<sup>11</sup> [http://ec.europa.eu/fisheries/partners/consultations/seabirds/index\\_en.htm](http://ec.europa.eu/fisheries/partners/consultations/seabirds/index_en.htm)

<sup>12</sup> Carranza, A., Domingo, A., Estrades, A. 2006. Pelagic longlines : a threat to sea turtles in the equatorial eastern Atlantic. Biological Conservation vol. 131, n° 1, 52-57

<sup>13</sup> Chassot, E., Amade, M.J., Chavance, P., Pianet, R., Dedo, R.G. 2009. Some preliminary results on tuna discards and bycatch in the French purse seine fishery of the Eastern Atlantic Ocean. ICCAT SCRS/2008/117

<sup>14</sup> Chassot, E., Amade, M.J., Chavance, P., Pianet, R., Dedo, R.G. 2009. Some preliminary results on tuna discards and bycatch in the French purse seine fishery of the Eastern Atlantic Ocean. ICCAT SCRS/2008/117

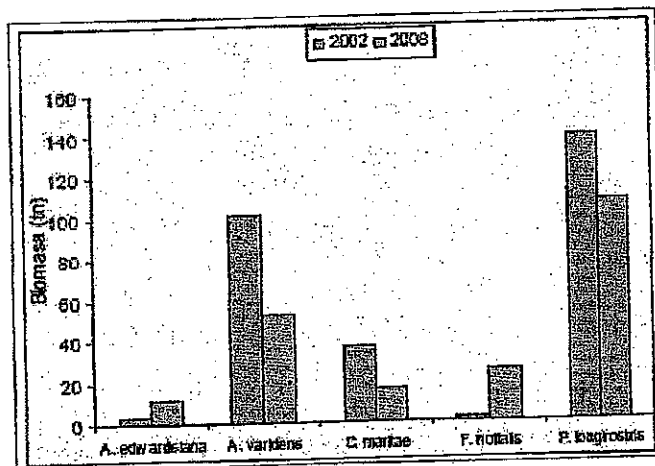
<sup>15</sup> Scientific estimations of bycatch landed by the Spanish surface longline fleet targeting swordfish in the Atlantic Ocean. ICCAT SCRS/2008/045

### 2.2.1 Shrimp

Crustaceans represent perhaps the most important commercial group in the fisheries of Guinea Bissau. These include deep-water shrimp, *Parapenaeus longirostris* and *Aristeus varidens*, which are found in depths ranging from 100 – 500m, and the shallow-water shrimps, *Penaeus notialis*, *Parapenaeopsis atlantica*, and *Penaeus monodon*, which are targeted in waters of 0 – 100m. Other species of commercial importance are the deep-sea crab *Geryon maritae* (found exclusively at a depth beyond 200m) and the royal spiny lobster *Panulirus regius* (found exclusively at a depth less than 50m).

In 2009 the total catch of crustaceans was an estimated 3,520 tonnes, consisting of 1,036 tonnes of *Parapenaeus longirostris* and 545 tonnes of *Penaeus notialis*, the rest being made up of crab catches. There is high uncertainty about the level of exploitation for these two main target species (see Table 8). CIPA has estimated a maximum sustainable yield of 3,393 tonnes, based on the results of recent demersal surveys (2004, 2006, 2008), but this concerns all crustacean species combined. One major complicating factor is that surveys have not been successful in providing reliable estimates of crustacean biomass, the shallow-water shrimp species in particular.

The latest survey in 2008 estimated a *Parapenaeus longirostris* biomass of only about 100 tonnes (Figure 10). Note however that there appears to be a trend for decreasing biomass in relative terms.



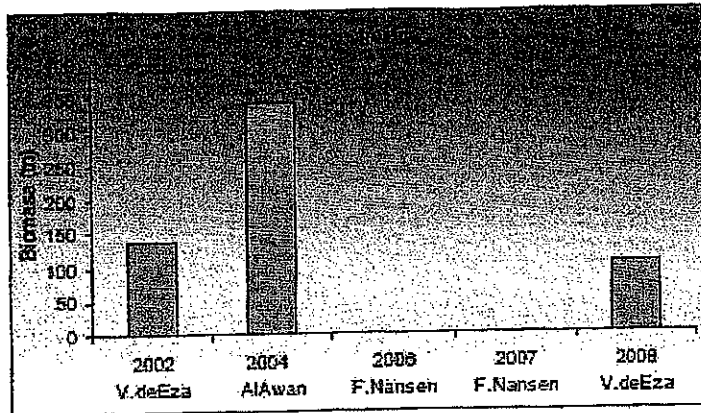
Source: Survey report "Guinea Bissau 0810". IEO & CIPA

**Figure 10: Estimated biomass of major crustaceans from the Vizconde de Eza surveys in 2002 and 2008.**

Figures 10 and 11 show that successive surveys during the last decade have estimated rather low biomass of deep-water shrimp, *P. longirostris*, which does not correspond at observed catches of about 1,000 tonnes/year. In the case of shallow-water shrimp, *P. notialis*, survey biomass estimates are even lower, a major part of the stock area is not covered by surveys (i.e. shallow and coastal areas). Another reason appears to be the gear type and configuration of survey vessels, which are not efficient at catching these species of shrimp, even if they conduct the survey in the correct zone.

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Source: Survey report "Guinea Bissau 0810". IEO & CIPA

**Figure 11: Comparison of biomass estimates of deep-water shrimp, *P. longirostris*, from recent surveys carried out in Guinea Bissau.**

Considering these methodological difficulties, it can be useful to take advantage of catch and effort data available from the fishery. Catch-per-unit-effort (CPUE) can be used as an approximate abundance index and can be used in conjunction with survey data to determine whether trends in the data are consistent. Fishing effort data in terms of number of fishing days is available for several years, and provides a suitable measure of fishing effort in trawl fisheries (as shown in Table 8). An alternative effort measure was used for comparative purposes, which was effective GRT (the GRT of licensed vessels adjusted to account for time period of operation). This is not an ideal indicator of effort as it does not take into account whether vessels were actually operating, but it is the approach used in the CIPA 2010 management plan and can be considered an alternative when fishing effort data is lacking or inconsistent.

It is interesting to note these two alternative CPUE measures (shown in Figure 12) show either stable or increasing trends, albeit highly variable. This suggests relatively stable exploitation or improving catch rates due to lower fishing pressure. Note that there has been a decrease in the number of vessels (i.e. expressed as number of standard licensed vessels). The problem here is that all crustacean species are combined, so that possible decreasing CPUE for major target species is masked. It is clearly a priority for CIPA to make advantage of available data to investigate this for specific target species.

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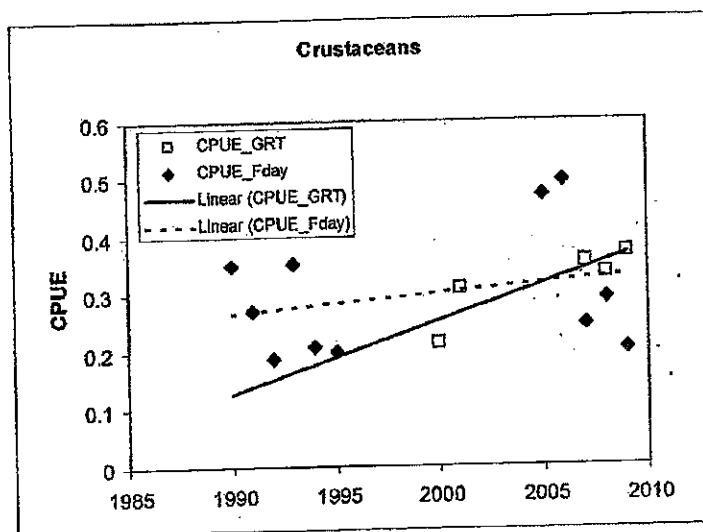
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Table 8: Crustacean catch and effort data

Year	Catch (t)	Vessels	GRT eff	F_days	CPUE_GRT	CPUE_Fday
1990	5,134			14,673		0.350
1991	4,403			16,215		0.272
1992	3,302			17,428		0.189
1993	4,436			12,595		0.352
1994	2,745			13,182		0.208
1995	2,944			14,791		0.199
1996	3,099					
1997	2,314					
2000	2,393	50	11,153		0.215	
2001	3,379	49	10,949		0.309	
2002		46	9,935			
2003		58	14,052			
2004		51	10,880			
2005	5,484			11,675		0.470
2006	4,327			8,759		0.494
2007	1,835	29	5,187	7,476	0.354	0.245
2008	1,241	24	3,728	4,293	0.333	0.289
2009	1,705	30	4,633	8,471	0.368	0.201

Source: CIPA & DSPI; note that GRT eff was corrected for 2009



Source: Consultants estimates based on CIDA data

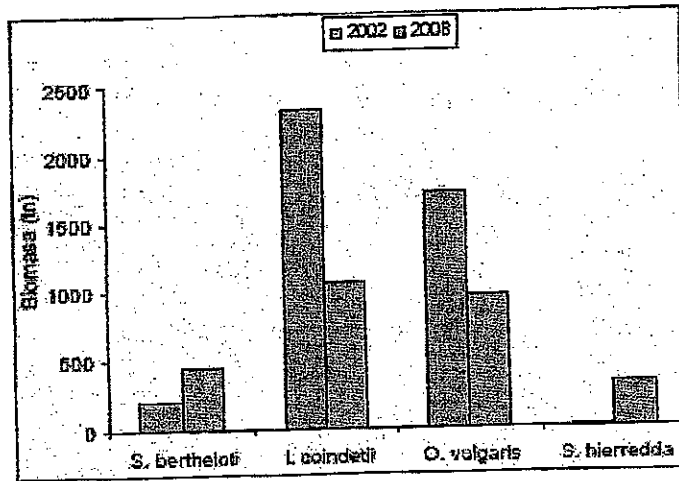
Figure 12: Plot of CPUE data for crustaceans

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### 2.2.2 Cephalopods

The main targets of the cephalopod fishery are common octopus (*Octopus vulgaris*), and cuttlefish (*Sepia sp.*), which are caught in demersal trawl fisheries. In 2009, estimated catches were 4,385 tonnes of octopus and 955 tonnes of cuttlefish.

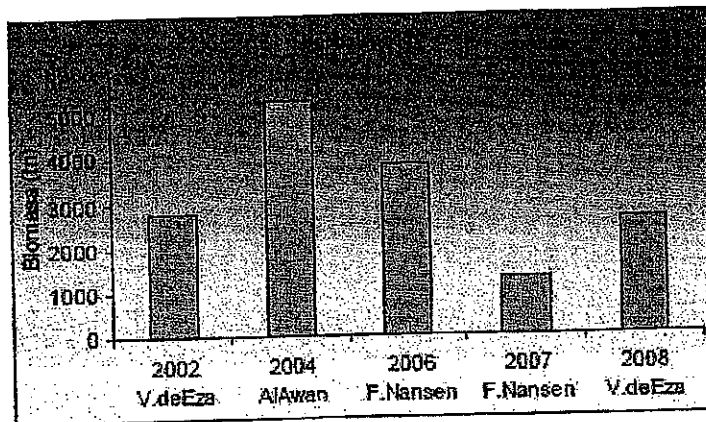
CIPA has estimated a maximum sustainable yield of 5,516 tonnes, based on the results of recent demersal surveys (2004, 2006, 2008), but again this concerns all cephalopod species combined. This would appear to indicate sustainable exploitation but the results of the Spanish survey in 2008 appear to show strong relative decreases in biomass over the period 2002 to 2008 (Figure 13).



Source: Survey report "Guinea Bissau 0810". IEO & CIPA

**Figure 13: Comparison of biomass estimates of main cephalopod species from the Vizconde de Eza surveys in 2002 and 2008.**

When considering all surveys carried out during the last decade, estimates of cephalopod biomass appear to show a high degree of inherent variability, which would also be expected from such short-lived species (Figure 14).



Source: Survey report "Guinea Bissau 0810". IEO & CIPA

**Figure 14: Comparison of cephalopod biomass estimates from recent surveys carried out in Guinea Bissau.**

The consultants applied the same approach as before for calculating CPUE as a complementary indicator of abundance. The results are shown in (Table 9), using fishing

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effort in number of fishing days and effective GRT (the GRT of licensed vessels adjusted to account for time period; pro rata temporis). The results show conflicting trends expressed graphically in (Figure 15). The more appropriate measure of fishing effort expressed in fishing days shows a clear downward trend, but this may be a sampling artefact due to a change in measuring/recording of fishing effort (note that points in the early 1990s cluster together as well as those in recent years). Fishing effort has not been measured consistently over time (or has not been published), which creates problems in building consistent time series of data. It is clearly a priority for CIPA to revise and validate statistical data on catch and effort, as this would provide the basis for carrying out formal stock assessments (including CPUE trends) of key stocks.

**Table 9: Cephalopod catch and effort data**

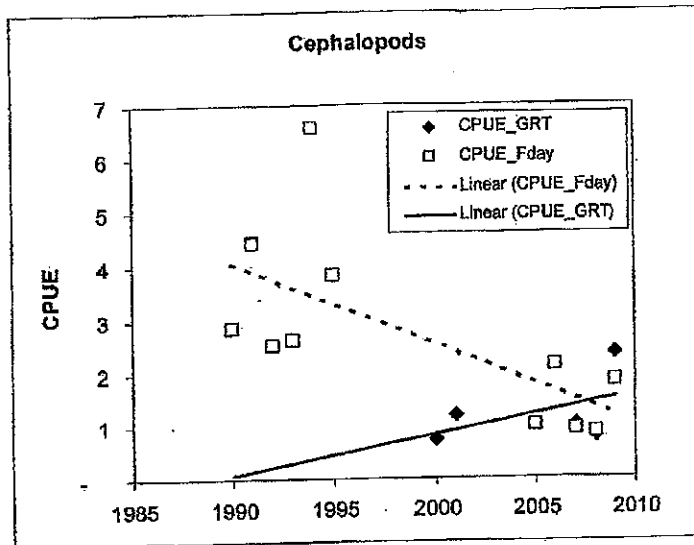
Year	Catch (t)	No. Eff	GRT eff	Fdays	CPUE_GRT	CPUE_Fday
1990	13,115			4,628		2.834
1991	10,154			2,285		4.444
1992	5,034			2,000		2.517
1993	6,414			2,458		2.610
1994	6,478			987		6.563
1995	7,773			2,031		3.827
1996	4,488					
1997	4,920					
2000	2,630	15	3,542		0.742	
2001	2,306	10	1,928		1.196	
2002		17	4,220			
2003		20	5,077			
2004		18	4,514			
2005	3,875			3,910		0.991
2006	7,337			3,455		2.124
2007	5,365	22	5,277	5,881	1.017	0.912
2008	3,364	19	4,262	3,899	0.789	0.863
2009	8,089	15	3,452	4,471	2.343	1.809

Source: CIPA & DSPI; note that GRT effort was corrected for 2009.

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Source: Consultants estimates based on CIPA data

Figure 15: Plot of cephalopod CPUE

### 2.2.3 Demersal fish

Catches of demersal fish are characterised by being rich in the number of species caught, which is typical of tropical trawl fisheries. The main demersal fish families of commercial importance are the seabreams (*Sparidae*), grunts and sweetlips (*Haemulidae*), sea catfishes (*Ariidae*), croakers and drums (*Sciaenidae*), and various flatfishes. Hakes (*Mertuiciidae*) and threadfins (*Polynemidae*) are also important but are less abundant. The breams have replaced the grunts and sweetlips as the most abundant group, with respect to the findings, while all other groups have retained their rank.

Catches of demersal fish by the industrial trawl fisheries were about 27,000 tonnes in 2009. Estimates of potential exploitable fish biomass range from 77,000 to 160,000 tonnes, according to the CIPA 2010 management plan, based recent survey estimates (2004, 2006, and 2008). Note that these biomass estimates are inherently variable (Table 10). This implies that the level of exploitation appears to be low, but one major issue is that catch estimates do not take into account discards which are known to be high in tropical trawl fisheries, for shrimp trawling in particular. This is further aggravated by current bycatch limits in the shrimp trawl fishery (50% fish or cephalopods allowed to be retained onboard by shrimp trawlers), effectively forcing fishermen to discard. Also, some species may be over-exploited but this may be masked when considering aggregated data (i.e. the 2008 Spanish survey identified strong relative decreased in hake biomass).

Overall, the demersal bony fish represent approximately 80% of the demersal biomass (based on the Al-Awam 2004 survey). The cartilaginous fishes (rays and sharks) account for about 11% of demersal biomass, giving a total of 89% for fish. Numerous demersal sharks and rays have been recorded in surveys and an estimated potential catch of 5,000 tonnes has been estimated (Al-Awam survey in 2004). However, CIPA statistics tend to show very low retained catches of sharks and rays.

A 1993 CIPA study revealed that Ormagozinho Island in the Bijagos group was the centre of a shark fishery, and the major caught species were reported as *Carcharinus signatus*, *Carcharinus limbatus* and *Rhinobatus rhinobatus*. Other pelagic carcharid and lamnid sharks are known to roam Guinea Bissau waters, such as Thresher, Blue and Mako sharks, equally valued for their meat and fins.

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Table 10: Compilation of Guinea Bissau surveys and estimates of total biomass

Year	Survey	No. Hauls	Biomass ('000 t)
1963	La Rafale	21	247
1964	La Rafale	18	273
1981	Fridtjof Nansen	17	448
1986	Fridtjof Nansen	29	337
1988	Noruega	31	266
1989	Noruega	83	45
1990	Noruega	98	351
1991	Noruega	30	95
1992	Nansen	43	66
1995	Capricórnio	77	20
1995	N'Diogo	137	126
2002	Vizconde de Eza	66	165
2004	Al-Awam	105	479
2006	Fridtjof Nansen	17	47
2007	Fridtjof Nansen	19	18
2006	G. Lansana Conte?	n/a	161*
2008	Vizconde de Eza	98	149

Source: SIAP EDF Project; CIPA

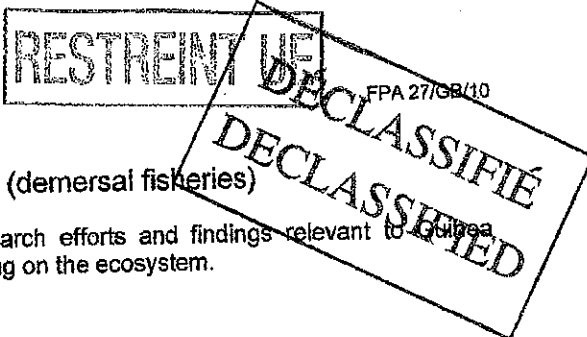
\* estimated

Pelagic shark species abound in Guinea Bissau waters and pelagic sharks are reportedly subject to a targeted fishery carried out by mostly Senegalese fishermen deploying long-lines and gillnets. The most valued species is the Bignose shark (*Carcharinus altimus*), whose fins fetch the highest prices on Asian markets.

#### 2.2.4 Small pelagics

There are several important species of small pelagic fishes in Guinea Bissau waters. Most of the commercially important small pelagic species are from the *clupeid*, *carangid* and *scombrid* families. They migrate widely on long-shore routes, straddling the waters of a large number of West African countries, ranging from Morocco in the north, down to Liberia in the south. The species of main importance are *Decapterus rhonchus* (Carapau), *Scomber japonicus* (Cavala), *Sardinella* spp. and *Caranx senegallus* (Sareia). Bonga shad (*Ethmalosa fimbriata*) is very important representing a catch of at least 11,000 tonnes a year, taken mostly by artisanal fisheries both national and foreign. The false scad (Carapau) and sardinellas represent about 80% of the overall recorded pelagic catch taken by the industrial fishery. It is thought that important stocks of juveniles of these species, as well as adult stages of anchovies, are associated with the shallow waters of the extensive Guinean shelf.

Biomass estimates of small pelagics vary greatly, but these species are commonly regarded as under-exploited.



## 2.2.5 Ecosystem considerations (demersal fisheries)

The following summarises some recent research efforts and findings relevant to Guinea-Bissau fisheries on the possible effects of fishing on the ecosystem.

### Discards

A comprehensive review in 2005 of discards in fisheries presented estimates of discard rates (defined as % of total catch discarded) for various types of demersal fisheries<sup>16</sup>.

In shrimp and fish trawl fisheries, the study estimated a weighted average discard rate of 62.3% and 9.6% in these types of fisheries, respectively. Considering shrimp trawl, the sources of data concern tropical fisheries in the US, Indonesia, Ecuador, and Venezuela but the same level of discarding is expected to take place in West African shrimp fisheries. There is a specific study on discarding in the fishery for deep-water shrimp, *P. longirostris*, in Portugal which estimates a discard rate of 70%. Applying these discard rates in the Guinea-Bissau fisheries would imply a conservative estimate of discarding in the range of 25,000 to 50,000 tonnes.

### Sharks

At the regional level, ICCAT is increasingly involved in the assessment of impacts of shark by-catches, since these species generally exhibit low productivity and even low by-catches may have a detrimental effect. The focus is on pelagic species that are caught in association with ICCAT fisheries (i.e. longline primarily). Several measures have been adopted by ICCAT, including obligations and recommendations related to catch reporting, biological data collection, research efforts, and prohibiting shark-finning. It should be noted that the EU is a contracting party to ICCAT but Guinea-Bissau is not.

The main focus of the European Union Action Plan for the Conservation and Management of Sharks (2009)<sup>17</sup> is pelagic sharks when considering EU fishing activity in external waters. However, this Plan refers also to the catches of sharks in demersal fisheries carried out by EU fleets in third countries (estimating total annual catches of about 2,300 tonnes), but it appears to ignore the possible effects of high discarding rates in shrimp trawl fisheries. More efforts are needed in terms of data collection, also from the EU side, to assess the possible effects of discarding on demersal sharks and rays.

It should also be noted that a Sub-regional Plan of Action for sharks formulated in 2001 by a number of African countries including Cape Verde, Gambia, Guinea, Guinea-Bissau, Mauritania, São Tomé and Príncipe and Senegal<sup>18</sup>. The catch of sharks and rays is prohibited in the marine protected areas of Guinea-Bissau, according to the 2010 FMP. On the other hand, shark-finning is not mentioned, which implies that this activity may be carried out without any problem outside MPAs.

### Seabirds

Incidental catches of seabirds is a problem that has been identified in some fisheries (e.g. longline) and in specific areas (mostly higher latitudes). As the Guinea-Bissau fishing grounds

<sup>16</sup> Kelleher, K. 2005. Discards in the world's marine fisheries. An update. FAO Fisheries Technical Paper. No. 470. 131p.

<sup>17</sup> Communication From The Commission To The European Parliament And The Council, On a European Community Action Plan for the Conservation and Management of Sharks, COM(2009) 40 final, Commission Of The European Communities, Brussels, 5.2.2009

<sup>18</sup> IUCN 2002. Report on Implementation of the International Plan of Action for Sharks (IPOA - Sharks): paper submitted for discussion at the 18<sup>th</sup>, CITES Animals Committee meeting, Costa Rica, 8-12 April, 2002. IUCN Species Survival Commissions Shark Specialist Group (SSG) and TRAFFIC

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are not considered to be particularly good for longline fishing, (for tuna and associated species), this is not expected to be an issue or relevant in the Guinea Bissau context although some artisanal activity may be taking place.

### Turtles

The main species of sea turtles found in the Eastern Central Atlantic Ocean are all present in Guinea Bissau waters. Four of these species reproduce in Guinea Bissau, in the Bijagós Archipelago in particular, which are as follows:

- Green Turtle (*Chelonia mydas*) - **Endangered**<sup>19</sup>
- Hawksbill Turtle (*Eretmochelys imbricata*) - **Critically Endangered**
- Olive Ridley (*Lepidochelys olivacea*) - **Endangered**
- Loggerhead Turtle (*Caretta caretta*) - not nesting in Guinea Bissau - **Endangered**
- Leatherback Turtle (*Dermochelys coriacea*) - **Critically Endangered**

These turtles are all endangered species according to 2003 IUCN Red List of Threatened Species. Guinea Bissau (Poilão Island) is the most important green turtle breeding site in the West Africa and one of the most important in the Atlantic. The largest identified nesting site for green turtles (*Chelonia mydas*) in West and Central Africa is situated on Poilão island.

Globally, the greatest concern in relation to incidental catches of turtles concerns longline fisheries, but as there limited longline activity this impact is expected to be negligible in Guinea Bissau.

In Guinea Bissau, incidental by-catches of turtles in trawl fisheries is probably the primary concern. There is limited information on this, but a study estimated that around 300 sea turtles would have been accidentally caught by industrial trawlers in 1997, of which approximately 10% might have died before being released back to sea<sup>20</sup>. There are no regulations providing for the mandatory fitting and use of turtle exclusion devices (TEDs). However it does appear that most of the turtles caught accidentally are returned live to the sea. Moreover, the observer programme has a relatively high coverage of trawl fishing activities (around 100%), which is also an important incentive to release turtle by-catch alive.

The targeting or retention on board of turtles within the Marine Protected Areas is prohibited by the 2010 Fisheries Management Plan and the Fisheries Law. Fishers catching these species are obliged to return the animals to the water alive, and report the catch to the competent authorities. There is a need to extend these requirements to all of the national fisheries.

### Unsustainable cutting of mangroves for fish processing

Mangroves are a characteristic forest biotope in tropical river estuaries and tidal zones. The mangroves of Guinea Bissau comprise 6 species, of which *Avicennia germinans*, *Rhizophora mangle*, *Rhizophora racemosa* and *Rhizophora harrisonii* are the most common. They provide fuel wood for cooking, and for smoke-drying of much of the artisanal catch of fisheries. It is thought that over 20% of the national cover has disappeared over the last 20 or 30 years, but there are no reliable data available. Uncontrolled harvesting of mangrove stands leads to inland intrusion of salt water, loss of reproductive and juvenile habitats of marine species, and has already led to the documented erosion and complete disappearance of at least one island in the atoll.

<sup>19</sup> Note that : a taxon is "critically endangered" when it is facing an extremely high risk of extinction in the wild, as defined by reduction of at least 80% over the last 10 years (or three generations). A taxon is "endangered" when it is not critically endangered but is facing a very high risk of extinction in the wild, as defined by reduction of at least 50% over the last 10 years (or three generations).

<sup>20</sup> Based on interviews of observers (Broderick and Catry 1998).

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Of growing concern is the establishment of camps<sup>21</sup> in the Bijagós Islands by foreign fishermen, primarily from Senegal and Guinea Conakry<sup>22</sup>. These people are known for their fishing skills and it is estimated that they account for about 80-90% of artisanal fisheries production in Guinea Bissau (artisanal catch estimates range from 20,000 to 50,000 tonnes). A major proportion of this production is exported in smoked/dried form, thus putting considerable pressure on mangrove forests which are used for fuel wood.

### Marine mammals

There is only limited information on marine mammal by-catch, particularly in the eastern tropical Atlantic. However, anecdotal information tends to indicate that this is normally a problem in local artisanal fisheries where various marine mammals may be targeted or used opportunistically. This is for example the case for Atlantic Humpback dolphins (*Sousa teuszii*), bottlenose dolphin (*Tursiops truncatus*), harbour porpoise (*Phocoena phocoena*) and long- and shortbeaked common dolphins.

The targeting or retention on board of dolphins within the Marine Protected Areas is prohibited by the 2010 Fisheries Management Plan and by the Fisheries Law. Fishers catching these species are obliged to return the animals to the water alive, and to report the catch to the competent authorities. There is a clear need to extend these requirements to all of the national fisheries.

The Ilhéu do Pollão is also home to one of the largest West African Manatee (*Trichechus senegalensis*) populations in West Africa. Although the populations of this species have declined due to targeted hunting in the past, no specific fisheries interactions are reported.

## **2.3 Fisheries management measures**

### **2.3.1 Evolution of Fisheries Management Plans**

The Fisheries Management plan sets out the approach to ensuring sustainable fisheries. It determines the quantum of fishing opportunities available for allocation to the different fleets utilising the resource, and sets the technical access conditions. Guinea Bissau has no capacity to control and enforce TACs and quotas and the trawl fishery is managed by limits on licensed capacity (using GRT/year *pro rata temporis*) as the primary variable for limiting access.

With at least four different interest groups using the fishery (national plus three international access agreements), it is important to have a robust management plan as a foundation for the access conditions, thus avoiding differences between agreements. This has largely been achieved by bringing them all into line with the plan (see section 4.1 which compares the different Agreements).

The first fisheries management plan (FMP) for Guinea Bissau was developed under the USAID-funded TIPS project, in 1995 and 1996. This was adopted in 1996 and was the basis for management during successive years. Table 12 shows the evolution of the fisheries management plans applied by Guinea Bissau from 2000 to the present.

The FMP stipulates total allowable catches, total number of vessels, and total weight of GRT to operate in the various types of fisheries, but Table 12 shows that these limits are not always respected in the implementation.

<sup>21</sup> Some of this are large communities the size of small towns with an organised structure and a system of self-rule, usually in the form of chiefs or elders. Guinea Bissau authorities sometimes have problems in imposing Guinean rules and regulations.

<sup>22</sup> including also ramasseur fishermen, also known as pesca conxa in Guinea Bissau; i.e. mother ship with a number of pirogues sent out to fish.

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The planned limits were exceeded for cephalopods every year from 2007 to 2010 (in terms of licenses issued).

The FMP was substantially revised in 2005, which led to substantial increases in allowed fishing capacity (in terms of GRT) for most types of fisheries, resulting in an overall increase to 51,000 GRT (from 25,229 GRT in 1996). It is important to note that GRT limits and vessel numbers were also defined for tuna fisheries in these FMPs. Tuna fishing opportunities also increased from 30,000 GRT in 1996 to 49,000 GRT in 2005, corresponding to 52 and 85 tuna vessels respectively (purse seiners, longliners and baitboat all combined).

Due to concerns regarding the state of shrimp and cephalopod stocks at the time, a revision of GRT limits contained in the FMP was agreed in connection with the negotiation of the first protocol of the new Fisheries Partnership Agreement, which applied from 2007. Reductions concerning the total fishing capacity allowed in the crustacean and cephalopod fisheries were agreed and stipulated in the Annex III of the protocol. This involved reductions of capacity limits of 27 and 30% for crustaceans and cephalopod fisheries respectively, along with increases in demersal and pelagic fisheries. Overall, the agreed FMP resulted in an increase from 51,000 to 54,600 GRT (and maintained capacity limits for tuna). This agreed FMP was to be implemented in 2007 but it is important to state that the obligation for capacity limit reductions was conditioned on the availability of scientific advice, implying that this would not be necessary if scientific information could justify that there was no need for this.

The FMP formally adopted by the Government of Guinea Bissau in 2007 did not reflect these reductions in shrimp and cephalopod fishing opportunities as set out in Annex III of the FPA protocol. Instead the plan retained the same capacity limits as were specified in the 2005 FMP, with some adjustments to vessel numbers allowed. Scientific surveys had been carried out in 2004 and 2006 and were presumably the main justification for retaining the 2005 opportunities. These surveys, which were carried out in collaboration with IMROP-Mauritania and CNHSB-Conakry respectively, resulted in relatively high biomass estimates including for target species (as shown in Table 10). The 2007 FMP formed the basis for management of the fisheries in successive years (2008 and 2009) with minor modifications (i.e. slight increase in capacity limits for demersal fish trawlers).

### 2.3.2 The 2010 fisheries management plan

Recently adopted, the 2010 FMP uses the results of surveys as the basis for estimating biomass and corresponding total allowable catches (TACs), which are then converted to GRT or fishing capacity limits. Table 11 presents a summary of the approach used for demersal categories, which involves the following steps:

- o Estimate total biomass for commercial categories
- o Calculate TAC on the following basis: exploitable potential is a proportion of total biomass defined as 50% for fish, 65% for crustaceans, and 70% for cephalopods
- o Calculate the average from available TAC estimates
- o Calculate an effort indicator based on GRT; factor the GRT of vessels based on the number of licensed months (CPUE\_GRT)
- o Calculate a GRT limit corresponding to the defined TAC ( $TAC / CPUE\_GRT$ )

Also included in the table is an alternative calculation carried out by the consultants for comparative purposes, using 2008 as the reference year for the calculation of CPUE.

The limits on the numbers of vessels expressed in the FMPs over the years are shown in Table 12. In the 2010 FMP there is no explanation of the procedure for the calculation of the number of vessels based on the GRT limits. This is related to at least one major inconsistency in the specification of 73 vessels allowed in the shrimp fishery in 2010. This is almost a doubling of the number of vessels, from 39 in 2007.

The methodology used is a pragmatic approach making use of readily available data, but it is important to state the assumptions made in order to assess the reliability of the estimates.

TACs are also specified in the FMP for small pelagics (100,000 tonnes) and tuna (5,000 tonnes), but the justification for this is not provided. The number of vessels is defined for each

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type of fishery. In the 2010 FMP vessel numbers and GRT are no longer specified for the tuna fisheries (although no explanation is given for this change).

Other aspects of the 2010 FMP consider the technical measures aimed at reducing catches of juveniles and excessive levels of bycatch. These include definition of mesh size, fishing zones and gears, including the prohibition of certain fishing gears and the catch of specific species. It also proposes to ban the practice of "ramasseur" fishermen (pesca conexa) by not issuing any licenses for this activity.

The 2010 FMP proposes revised limits on bycatch with the objective of reducing bycatch. These are:

- o Shrimp trawlers: a maximum of 15% cephalopods and 70% fish as bycatch
- o Cephalopod trawlers: a maximum of 45% fish and 5% crustaceans as bycatch
- o Fish trawlers: a maximum of 10% cephalopods and 5% crustaceans as bycatch

Particularly in the case of shrimp trawlers, this is a substantial increase from 50% to 70% allowed bycatch of fish, which should result in reduced discards.

At present there are no closed seasons in the fishery. However a possible closed season is being considered for the shrimp and cephalopod trawl fishery. This could impact on EU fleet operators who use a combination of Mauritanian and Guinea Bissau fishing grounds, active in the latter when the former are subject to seasonal closure.

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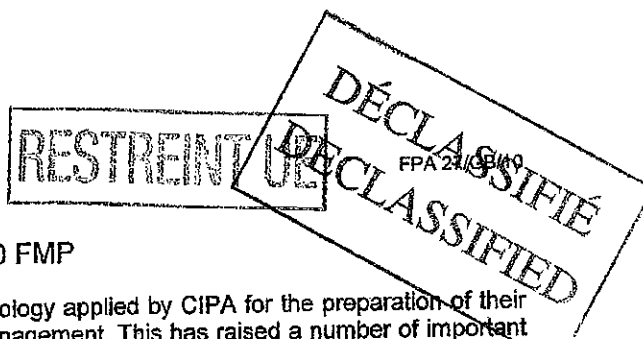
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Table 11: Methodology for estimating TACs and corresponding GRT limits

Year	Source	Variable	Fish	Crustaceans	Cephalopods	Comments
<b>Biomass estimates and calculation of potential</b>						
2004	IMROP & CIPA	Biomass	154,000	4,462	7,571	Al-Awam survey
		TAC 2004	77,000	2,900	5,300	factors applied; see text
2006	CNSHB & CIPA	Biomass	321,850	5,615	8,229	G. Lansana Conte survey
		TAC 2006	160,925	3,650	5,760	factors applied; see text
2008	IEO & CIPA	Biomass	237,788	5,585	7,841	Vizconde de Eza survey
		TAC 2008	118,894	3,630	5,489	factors applied; see text
Mean		TAC 2010	118,940	3,393	5,516	
<b>Calculation of fishing capacity limits</b>						
Not specified	CIPA	CPUE_GRT	6.400	0.330	1.980	using GRT as effort indicator
Not specified	CIPA	GRT Limit	18,577	10,999	2,772	TAC / CPUE_GRT
Ref year 2008	consultants	CPUE_GRT	5.398	0.333	0.789	using GRT as effort indicator
Ref year 2008	consultants	GRT Limit	22,034	10,190	6,992	TAC / CPUE_GRT
Ref year 2010	CIPA FMP	GRT Limit	10,000	10,999	6,061	adopted limits

Source: CIPA





### 2.3.3 Assessment of the 2010 FMP

The consultants have reviewed the methodology applied by CIPA for the preparation of their scientific recommendations for fisheries management. This has raised a number of important issues with regard to the validity and reliability of the scientific advice. This is especially important since the plans based on this scientific advice are considered to have primacy over the management plan agreed within the frame of the Protocol to the FPA.

The 2010 FMP used the results of recent fisheries surveys (i.e. 2004, 2006 and 2008) as the basis for estimating biomass and corresponding total allowable catches (TACs), which are then converted to GRT or fishing capacity limits. The methodology used is a pragmatic approach making use of readily available data, but there are a number of assumptions that need to be stated and/or explained in order to assess the reliability of the estimates.

On the estimation of total biomass from surveys, there appears to be confusion between the use of total estimated biomass and biomass of commercially important species. Also, the results of the different surveys are not directly comparable as these involved different vessel/gear configurations.

The setting of TACs is based on the assumption that "sustainable" exploitable potential is a proportion of total biomass defined as 50% for fish; 65% for crustaceans, and 70% for cephalopods. This is difficult to assess but it appears to be reasonable when considering that these are tropical and/or short-lived species. More refined methods for setting these "rules-of-thumb" are available based on empirical data and should be investigated and documented. Note however that species-specific issues are ignored and based on a "bulk" of biomass. Another aspect of the approach used implies that biomass estimates from surveys can be used as absolute values, but this should be avoided. It is wiser to use survey results as relative abundance indicators but the problem here is that survey methodology should be constant over time (including vessel/gear configuration).

It is not advisable to estimate TACs on the basis of biomass estimates over a number of years. Surveys are not directly comparable as mentioned above but also in the case of short-lived species, it is important not to average out the variability, possibly leading to overly optimistic or pessimistic estimates of biomass.

Considering the catch per unit effort CPUE, this is considered an essential variable which can provide indications on relative abundance. It is used in conjunction with fishery-independent data (e.g. surveys) in order to determine whether data trends are consistent. Fishing effort may be expressed in terms of GRT, or in terms of other measures (e.g. fishing days, fishing hours, number of hauls). CIPA has available data from observer records on the number of fishing days on trawl fishing effort, but has chosen not to use this in their calculations, relying only on the cruder licensed GRT measure of effort. The problem with the use of GRT as an effort indicator is that it is based on licensed vessels and not necessarily operating vessels, which could seriously bias the observed trends, for example by masking a decline in actual catches by operating vessels. The approach could therefore introduce significant errors into the estimation of sustainable GRT limits<sup>23</sup>. This has particular bearing in this case because of the conflicting trends observed in CPUE data for cephalopods (see resources in section 2.2). The use of either 2008 or 2009 as the reference year for the calculation of CPUE has a strong effect on the calculation of GRT limit<sup>24</sup>.

Finally, whilst the estimation of GRT limits by CIPA is straightforward (within the methodological limits set out above), there is a question with regard to the way in which these

<sup>23</sup> the consultants estimate that this can be by a factor as much as 2 in the case of the fishing capacity limit for cephalopods

<sup>24</sup> Note that some errors were identified and corrected in CIPA data concerning effective GRT in 2009 which also had an important effect on CPUE.

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GRT limits were adjusted in the FMP. There are some substantial differences between the calculated GRT limits and the final recommended limits, and the reason for this is not clear. For example in the management plan, the recommended GRT limit for cephalopods is roughly double the calculated value (a recommendation of 2,772 GRT/year becomes 6,061 GRT/year in the plan). The GRT for demersal fish is halved (18,577 GRT/year becomes 10,000 GRT/year). Only in the case of crustaceans is the recommended limit (10,999 GRT/year) equal the calculated value (GRT). It is not clear how these calculated values were adjusted and transformed to the recommended GRT limits in the FMP. There is a lack of transparency in the way in which scientific advice is being prepared and applied.

### 2.3.4 Future management plans

The creation of a Joint Scientific Committee in the context of the FPA provides an opportunity for collaboration between Guinean and European scientists on the various issues raised above. Many of these issues are generally applicable and many countries struggle with the same objective. Building up a consistent time series of fishery dependent and independent data is a long painstaking process involving considerable efforts and financial means.

To ensure a more sustainable Agreement in future it is important to build up and validate a consistent time series of catch and effort data, making use of CIPA data and taking into account specific target species. Survey results are useful and important but as the results are inherently variable and the methodology used tends to change for each survey. This is especially the case when a country relies on collaboration with third parties to undertake the survey. In these circumstances more reliance should be placed on reliable fisheries statistics. Guinea Bissau is missing the opportunity to improve validity and reliability of fisheries management recommendations provided by its functional and effective observer coverage of the trawl fishery. There are a number of useful statistical tools for application in the field of stock assessment, adopting Bayesian methods and empirical approaches, which make it feasible to carry out assessments even in data-poor situations<sup>25</sup>.

Some other issues that require further efforts or study from the management point of view include:

- o Continue efforts of collecting fisheries statistics including both artisanal and industrial fisheries
- o Collect data on discarding and bycatch in order to assess possible effects on sensitive species such as sharks and rays, turtles, etc.
- o Identification of sensitive fishing grounds for specific resources such as deep-water or shallow-water shrimp and define specific mesh sizes for specific areas;
- o Define the reproductive cycle of main target shrimp species and investigate the need for seasonal closures
- o Investigation of the potential use of fish excluding devices in the shrimp fisheries in general

<sup>25</sup> An introduction to this field is given in FAO 2006; Stock assessment for fishery management. FAO Fish. Tech. Pap. No. 487, Rome, FAO, 261p.

Table 12. Evolution of fisheries management measures in the Guinea Bissau EEZ

Year	Comment	Effective GRT (pro rata temporis)						No. Vessels (standardised no. of vessels; full-time equivalents)							
		Crustaceans	Cephalopods	Demersal Fish	Pelagic Fish	Sub-total	Tuna	Total	Crustaceans	Cephalopods	Demersal Fish	Pelagic Fish	Total	Tuna PS	Tuna BB
1996/1997	adopted mgt plan	10,200	2,776	6,253	6,000	25,229	30,000	55,229	40	11	25	20	96	52 (tot)	36
2000	utilised	11,153	3,642	3,475	10,768	28,938	18,871	47,809	49.5	15.0	14.5	5.0	84		
2001	utilised	10,949	1,928	563	5,684	19,154	25,786	44,940	49.3	10.0	2.0	3.3	65		
2002	utilised	9,935	4,220	2,377	6,643	23,175	31,460	54,635	46.3	17.3	9.3	3.5	76	29	14
2003	utilised	14,052	5,077	2,690	8,541	30,361	30,216	60,577	58.3	19.8	11.0	4.5	94	30	16
2004	utilised	10,880	4,514	2,179	9,490	27,064	29,980	57,044	51.3	18.3	7.8	5.0	82	28	16
2005/2006	adopted mgt plan	11,000	8,000	12,000	20,000	51,000	49,000	100,000	39	25	66	11	131	95 (tot)	
2007	agreed in FPA protocol	8,000	5,600	18,000	23,000	54,600	49,000	103,600						23	14
2007	adopted mgt plan	11,000	8,000	12,000	20,000	51,000	49,000	100,000	39	32	18	5	94		
	allocated	10,014	8,433	7,398	61,000	86,845	61,000	147,845							
	utilised	5,187	5,277	1,884	7,403	19,751	10,114	29,866	29.3	21.8	6.5	4.0	62	8	10
2008	adopted mgt plan	11,000	7,000	13,000	20,000	51,000	49,000	100,000							
	allocated	10,014	8,433	7,398	61,000	86,845	61,000	147,845							
	utilised	3,728	4,262	3,265	6,643	17,898	29,277	47,176	23.5	18.5	10.8	3.5	56	23	12
2009	adopted mgt plan	11,000	7,000	13,000	20,000	51,000	49,000	100,000							
	allocated	10,014	8,433	7,398	61,000	86,845	61,000	147,845							
	utilised	2,860	2,145	1,408	6,643	13,056	26,305	39,361	29.6	14.5	7.3	4.0	55	22	11
2010	adopted mgt plan	10,999	6,061	10,000	15,625	42,685	na	na	73	24	33	25	155		
	allocated	8,619	7,536	7,968	14,667	38,688	na	na							
	utilised	2,863	3,306	3,991	6,643	16,703	na	na	18.5	14.3	13.5	3.5	50	25	8

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### 2.3.5 Implementation of the management plans

In recent years the capacity limits as set out in the annual FMPs have been respected with regard to shrimp and demersal fish trawling. However this is not the case for cephalopods, where the authorities have consistently issued licences in excess of the GRT limits set by the plan. It appears that the limits are adjusted to compensate for lower rates of utilisation, with a view to maximising revenues. This appears to be the reason why very high capacity limits have been set in the case of pelagic fish and tuna.

Overall, it is important to note that actual utilisation of fishing possibilities has always been within the limits specified in the FMP, including for the critical crustacean and cephalopod categories. In fact actual utilisation shows that the number of licensed vessels has decreased substantially over time. Whilst there are some doubts regarding i) methodology for scientific advice ii) the setting of GRT limits in line with plans and iii) issuing of some licences in excess of limits set out in the plan, none of these fisheries management weaknesses are likely to have impacted negatively on the sustainability of the fishery. It is important to bear in mind that the most important targets of the fisheries (i.e. shrimp and octopus) are short-lived species, which are also subject to environmental effects, resulting in variable abundance (e.g. recruitment processes, growth, reproduction, etc).

## 2.4 Summary of stock status and management recommendations

Table 13 overleaf gives a summary of the preceding sections, describing the stock status, catch data and management recommendations for each of the species subject to the EU-Guinea Bissau FPA.

Table 13: Summary of current status of relevant stocks and management measures in place

Stock	Estimated MSY tonnes	Current Yield <sup>24</sup> tonnes	Management measures in place / comments
Highly migratory species			
Yellowfin tuna	124,000 - 152,500 (ICCAT 2008)	107,859 in 2008 (exploited sustainably)	- Effective fishing effort not to exceed 1992 level (Rec. 93-04); according to stock assessment results this level, measured in fishing mortality, may have now been reached due to movement of vessels into the Atlantic from the Indian Ocean - Season/area closure of surface fishing in 0° - 5°N, 10° - 20°W, effective from 2005 (Rec. 04-01); measure intended to protect bigeye juveniles primarily (see bigeye)
Bigeye tuna	68,000 - 99,000 (ICCAT 2007)	69,821 in 2008 (fully exploited)	- TAC of 85,000 tonnes in 2010 (Rec. 09-01); EU: 31,200t (for ESP, FRA, PRT); Council Reg. EC 23/2010 - Limits on numbers of fishing vessels less than the average of 1991 and 1992 (larger than 24m LOA and specific to GRT) - Specific limits on number of longline boats; China (45); Chinese Taipei (98 + 7 in 2010 & 2011); Philippines (8 + 2 in 2010 & 2011); Specific limits on number of purse seine boats for Panama (3) - No purse seine and baitboat fishing during November in the area encompassed by 0° - 5°N, 10° - 20°W (Rec. 98-03, 04-01, 06-01, 08-01, 09-01) (Council Reg. EC 520/2007) - Season/area closure of surface fishing in 0° - 5°N, 10° - 20°W, effective from 2005 (Rec. 04-01); measure intended to protect bigeye juveniles primarily;
Skipjack (eastern stock)	143,000 - 170,000 (ICCAT 2008)	127,000 in 2008 (exploited sustainably)	-
Coastal demersal resources			
Shallow waters (0 - 50 m)	20,000 - 50,000 <sup>27</sup>	20,000 - 50,000	- Consists of a wide variety of demersal resources that are accessible to artisanal vessels only (within the 12 nm baseline; licensing requirements), but in many cases these are the same stocks as exploited by industrial fisheries. Estimates are uncertain due to highly variable nature of the fisheries and lack of control on foreign artisanal vessels. Some species may be exploited sustainably while others may not be.
Demersal fish	77,000 - 160,000 <sup>28</sup>	≈ 27,000	- Exploited by industrial fisheries (outside 12 nm baseline). Mesh sizes, bycatch limits and total fishing capacity defined (in GRT). Overall exploitation level appears to be low but some of the concerned species may be exploited unsustainably. Note that catch estimates do not include discards.
Cephalopods	5,316 <sup>29</sup>	5,339	- Exploited by industrial fisheries (outside 12 nm baseline). Mesh sizes, bycatch limits and total fishing capacity defined (in GRT). Catches dominated by octopus and cuttlefish. - CPUJE data shows conflicting trends and survey data indicates a relative decrease in biomass. Data not available on species-specific trends.

<sup>24</sup> Provisional 2008 data in the case of tuna (ICCAT). For other resources, provisional 2009 data provided by CIPA

<sup>27</sup> Based on recent socio-economic surveys including review of previous estimates: a) Enquête sur les aspects socio-économiques de la pêche artisanale en Guinée Bisau, 2006 & 2007; Macías González, *Projet d'appui au secteur de la pêche (PASP)*

<sup>28</sup> Based on recent surveys carried out during the period 2002 - 2008 and referred in the CIPA 2010 management plan.

<sup>29</sup> Based on recent surveys carried out during the period 2002 - 2008 and referred in the CIPA 2010 management plan.

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Stock	Estimated MSY tonnes	Current Yield <sup>25</sup> tonnes	Management measures in place / comments
Shrimp	3,393 <sup>30</sup>	3,520	- Exploited by industrial fisheries (outside 12 nm baseline). Mesh sizes, bycatch limits and total fishing capacity defined (in GRT). Catch estimates include crab as well as various shrimp species ( <i>Penaeus nobilis</i> , <i>Parapenaeus longirostris</i> , <i>Aristeus varidens</i> , etc.) - MSY is an aggregate of various species and does not specify important target species. - Shallow-water shrimp concerns <i>Penaeus nobilis</i> primarily. There is considerable uncertainty on the estimate of MSY. - CPUE data appear to indicate a stable level of exploitation, but this concerns aggregated data.
	1,000 – 5,000 <sup>31</sup>	545	- Deep-water shrimp concerns <i>Parapenaeus longirostris</i> , also known as "gamba". There is considerable uncertainty on the estimate of MSY.
	400 – 1,500 <sup>32</sup>	1036	- CPUE data appear to indicate a stable level of exploitation, but survey data (2008) show a relative decrease in biomass.
Total Demersal Resources	106,000 – 219,000	54,000 – 84,000	- Note that catch estimates do not include discards which could be in the order of 25-50,000 tonnes (see section on discards)
Coastal pelagic resources			
Mulletts and Bonga shad (0 – 50m)	100,000 <sup>33</sup>	12,000 – 35,000	- Consists of pelagic resources that are accessible to artisanal vessels only (within the 12 nm baseline; licensing requirements). Catch estimates are uncertain due to highly variable nature of the fisheries and lack of control on foreign artisanal vessels. However, exploitation level appears to be low.
Small pelagics	25,000 – 250,000 <sup>34</sup>	41, 299	- Exploited by chartered industrial vessels primarily (limits on fishing capacity in GRT are defined). Catches consist of Sardinellas, Scads, and Horse mackerel primarily. Exploitation level appears to be low but important to note that abundance appears to be highly variable, considering the results of acoustic surveys over the years.
Total Coastal Resources	231,000 – 456,000	106,000 – 161,000	

<sup>25</sup> Based on recent surveys carried out during the period 2002 – 2008 and referred in the CIPA 2010 management plan.

<sup>31</sup> A) CECAF 1979 Les ressources halieutiques de l'Atlantique Centre-Est. Première Partie: Les Ressources du Golfe de Guinée de l'Angola à la Mauritanie; J.P. Troadek and S. Garcia (eds), FAO Fisheries Tech. Pap. N° 186, FAO, Rome, 1979; B) Jumpe, RJT 2007. Avaliação de recursos halieuticos na Guiné-Bissau. Tese para obtenção do grau de Mestre. Fac. Ciências, Universidade de Lisboa, Portugal

<sup>32</sup> a) CECAF 1997. Groupe de travail ad hoc sur les merlu et les crevettes profondes, M. Lambouef (ed), COPACE/PACE/Ser No. 97/62, Rome, FAO, 90p; b) Jumpe, RJT 2007. Avaliação de recursos halieuticos na Guiné-Bissau. Tese para obtenção do grau de Mestre. Fac. Ciências, Universidade de Lisboa, Portugal

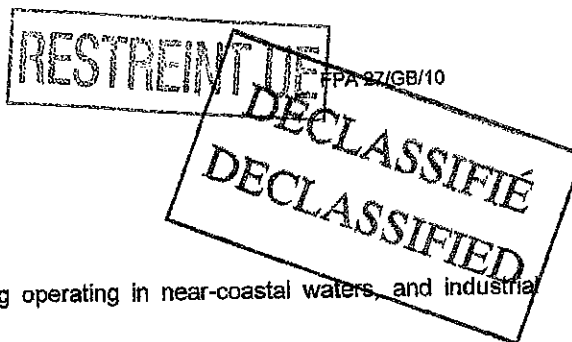
<sup>33</sup> Based on A) Longhurst 1983. Benthic-Pelagic Coupling and Export of Organic Carbon from a Tropical Atlantic Continental Shelf-Sierra Leone. Estuarine, Coastal and Shelf Science, 17: 261-288; B) Amoum, P., Duarte, G., Guerra, M., Morato, T., and Stobberup, K.A. 2004. Preliminary Ecopath Model of the Guinea Bissau continental shelf ecosystem. Modèle Ecopath du plateau continental de la Guinée-Bissau. In: M.L. Palomares and D. Pauly (eds), "West African Marine Ecosystems: models and fisheries impacts", Univ. British Columbia, Fisheries Centre Research Reports 12/04, 120p.

<sup>34</sup> Based on successive Fridtjof Nansen surveys; A) Saetersdal, G., Bianchi, G., and Strømme, T. 1999. The Dr. Fridtjof Nansen Programme 1975-1993. Investigations of fishery resources in developing regions. History of the programme and review of results. FAO Fish. Tech. Papers, n° 391, Rome, FAO, 434p. B) Surveys of the fish resources of the Western Gulf of Guinea (Benin, Togo, Ghana, Côte d'Ivoire). Survey of the pelagic and demersal resources 19 May - 7 June 2006. NORAD - FAO project GCP/INT/730/NOR; C) Surveys of the fish resources of the Western Gulf of Guinea (Guinea Bissau, Guinea, Sierra Leone and Liberia). Survey of the pelagic and demersal resources 5-29 May 2007. NORAD - FAO project GCP/INT/730/NOR

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## 2.5 Guinea Bissau fisheries

### 2.5.1 Fishing fleet

Guinea Bissau fisheries comprise artisanal fishing operating in near-coastal waters, and industrial fishing outside the 12 mile zone.

#### Artisanal fleet segment

Artisanal fisheries in Guinea Bissau are concentrated in the rivers and estuaries along the coast, particularly in the Bijagós Archipelago and the Cacheu River. Most of the artisanal vessels are canoes made from hollowed trunks. Assessing the size of the artisanal fleet in Guinea Bissau is difficult due to the lack of recent data.

A socio-economic survey of artisanal fisheries carried out in 2009 in the context of the PASP project indicated that out of a total of 1,495 fishing vessels, 75% were of the simple canoe type (made out of tree trunk) and 40% of this simple type of canoe were to be found in the southern regions (Tomabli and Quinara). The Senegalese type of pirogue, (much larger and called *nhomincas*), operate predominantly in the north (Cacheu and Varela) and in the islands (Bubaque and Uracane). Most of the camps established by foreign fishermen are located in Cacine and Caravela, predominantly by fishermen from Guinea Conakry and Sierra Leone (using another type of pirogue called *salam*). The total number of large artisanal vessels (*nhominca* and *salam*) totalled 215.

About 14% of interviewed fishermen (3930 owners and fishermen using fishing vessels) were foreigners, mostly from Senegal, Guinea Conakry and Sierra Leone. The population dependent on each fisherman was estimated to be 9 persons, leading to a total dependent population estimated at 20,000. Only 12.4% of the pirogues are motorised (mostly with engines less than 15HP). Most of the motorised vessels are found in specific sites such as Varela, Bissau, Calo and Bubaque. These figures should be used as conservative estimates as there is substantial variability during the year, where many fishermen are only active during a part of the year and may not own or operate a fishing vessel.

Artisanal fishing operations target the bonga shad (*Ethmalosa fimbriata*), high value demersal fish, barracuda and mullet. The gears deployed include drift and bottom set-nets, hook and line, long-lines and small seines. Most of the domestic small scale fishing takes place in inshore waters that are inaccessible to industrial vessels, but this does not appear to be the case for foreign artisanal fisheries which venture to the extent of the 12 mile zone and sometimes beyond. In contrast to domestic fishermen, foreign artisanal fishermen are known to be efficient, most likely accounting for a substantial proportion of total artisanal catches in Guinea Bissau (reportedly around 70-80%).

#### Industrial fisheries

Given the high productivity of its waters, the extensive fishable area of its continental shelf, and various fisheries access regimes in place, significant numbers of industrial fishing vessels are present in the Guinea Bissau EEZ. Industrial fishing is pursued outside the 12 mile limit reserved for artisanal fisheries.

The level of licensed industrial fishing capacity is shown in Table 14 which summarises vessel numbers and gross tonnage by gear type, effectively licensed in the industrial fisheries for 2007, 2008 and 2009. Note that the 2009 presented data covers licences issued only up to the end of February 2009 and is therefore incomplete.

Overall, during 2007 to 2008 about 124 industrial fishing vessels each year have operated in the Guinea Bissau zone. All undertake freezing onboard. Of these about 50 have been fish/cephalopod trawlers, about 35-40 shrimp trawlers, 5 midwater trawlers targeting small pelagic fish, and tuna, up to 23 purse seiners and up to 14 pole and line vessels both targeting tunas. It is important to note that this is a significant reduction in the numbers of vessels licensed to operate in 2003 (190) and 2004 (172). It appears to suggest a reduction in fishing effort since this time of about 30 to 35% (although this could easily have been compensated for by improvements in efficiency). Either way, it suggests that the fishery is likely to be more profitable than it was in the period 2000-2005. Note that 4 vessels

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are licensed as mother ships (pesca conexa). Most of these are Korean vessels working in conjunction with canoes operated by (mainly Senegalese fishermen). They receive fish and process/freeze onboard.

The nations and entities present in Guinea Bissau in 2005 include a Chinese fishing fleet averaging 17 vessels, operating under a bi-lateral fisheries agreement (signatory CNFC, the China National Fishery Corporation of the Peoples Republic of China). Chinese vessels operate only in the cephalopod and inshore shrimp segments, but retain higher value demersal fish catches onboard.

The EU fleet operates under a bi-lateral Fisheries Partnership Agreement. This provides access for about 15 to 20 fish/cephalopod trawlers and about 20 shrimp trawlers, along with a fleet of tuna vessels sector (about 30 vessels, mainly purse seine, but with some pole and line). One Irish trawl vessel (MV Menorca AY-777) drew a fishing licence in 2008 and 2009, operating outside the partnership agreement.

In addition there are about 4 Senegalese vessels (with Italian interests) operate in the shrimp trawl, and 3 or 4 Senegalese pole and line vessels also occasionally operating.

The remaining vessels operate mainly in the fish/cephalopod segment, with number varying from year, but accounting for up to 35 vessels per year (although this includes several mid-water trawlers targeting small pelagic fish). Some are flagged under the Guinea Bissau flag (about 4 or 5), but the majority (up to 52 vessels in 2008) are foreign vessels operating in joint venture arrangements with national interests. This segment includes vessels which are beneficially owned by Korean interest groups, and others operating under a wide range of flags (Mauritania, Togo, Belize, Panama), including some which may be considered to be flags of convenience.



Table 14: No.s of industrial fishing vessels licensed by type of activity

	Fish/Cephalopod			Shrimp			Pelagic			Tuna			Fishing vessels			Average 2007 - 2009	
	2007	2008	2009*	2007	2008	2009*	2007	2008	2009*	2007	2008	2009*	2007	2008	2009*		
EU	No. vessels	14	19	4	19	20	16	0	0	0	24	35	31	57	74	51	61
	GRT	2,693	2,878	458	1,534	1,769	1,058	0			9,006	29,174	26,266	13,233	33,821	27,782	24,945
CNFC	No. vessels	7	6	6	14	9	9	0	0	0	0	0	0	21	15	15	17
	GRT	1,343	1,155	1,155	2,442	1,752	1,752	0			0	0	0	3,785	2,907	2,907	3,200
Senegal	No. vessels	1	0	0	0	4	0	0	0	0	3	2	1	4	6	1	4
	GRT	48	0	0	0	135	0				151	103	40	198	238	40	159
National	No. vessels	0	3	2	4	0	0	0	0	0	0	0	0	4	3	2	3
	GRT	0	218	175	930	0	0	0			0	0	0	930	218	175	441
Charter	No. vessels	28	21	17	2	1	2	5	4	4	2	0	0	37	26	23	29
	GRT	3,078	3,277	1,765	281	72	50	7,403	6,643	6,643	958	0	0	11,720	9,992	8,458	10,057
TOTAL	No. vessels	50	49	29	39	34	27	5	4	4	29	37	32	123	124	92	113
	GRT	7,162	7,528	3,553	5,187	3,728	2,860	7,403	6,643	6,643	10,114	29,277	26,306	29,866	47,176	39,362	38,801

\*Note that 2009 data is for January-February only

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IUU fishing incidence in the sub-region covered by the CSRP (Commission Sous-régionale des Pêches/Sub-Regional Fisheries Commission) is known to be very high, with the highest incidence in the three southern countries (Sierra Leone, Guinea and Guinea Bissau). IUU vessels have in the past taken advantage of the weaknesses in fisheries MCS, civil conflicts and the incapacity of these governments to maintain an effective, deterrent fisheries surveillance presence at sea.

An overwhelming body of anecdotal evidence and solid regional surveillance data points to the fact many vessels operate without licences, or if they do have licences, operate in breach of conditions regarding zone restrictions, or technical limitations (such as mesh size and bycatch conditions). Table 15 indicates the overall level of IUU fishing detected in the Guinea Bissau zone, which includes infractions by licensed fishing vessels, as well as by unauthorised supply/service vessels. Overall, the data shows that out of 58 infractions detected 13 were for fishing without licence. The level of unlicensed fishing detected in 2008 is therefore about 10% if licensed vessels.

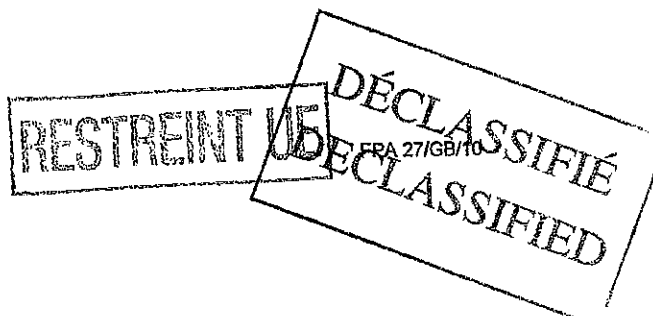
**Table 15: List of fisheries infractions detected during 2008 and 2009 by FISCAP**

Type of infraction (Industrial vessels)	No. of infractions
Unauthorised refuelling	3
Unauthorised supply of fuel*	7
Leaving port without permission	1
Absence of observer	3
Use of double sac	16
Unauthorised mesh size	7
Fishing in prohibited zone	7
Expired licence	2
No licence	11
Suspicion	1
<b>TOTAL</b>	<b>58</b>

\* supply vessels (including one EU flagged vessel) Source: FISCAP; Ministry of Fisheries, 2010

It is not only industrial vessels which are engaged in IUU fishing. The artisanal fisheries of neighbouring countries are also substantially involved, with 162 pirogues arrested by FISCAP in 2009. Guinea is the main offender, but Senegalese fishers also are engaged in unlicensed fishing. It is notable that many of the Senegalese canoes operate in conjunction with ramasseurs (factory vessels which receive fish from them). In 2009, 80 Senegalese canoes (and 450 crew) working with two Senegalese flagged Korean factory vessels were arrested<sup>35</sup>. This resulted in a diplomatic crisis between the two countries, which ended with a fine of EUR 275,000 (for the factory vessels) and EUR 46,000 for the pirogues.

<sup>35</sup> [http://www.dailymotion.com/video/xaxfne\\_guineebissau-vampirisme-de-la-peche\\_news](http://www.dailymotion.com/video/xaxfne_guineebissau-vampirisme-de-la-peche_news)



## 2.5.2 Catches

### Artisanal fishery

Estimates of artisanal production vary greatly, ranging from around 20,000 to 50,000 tonnes<sup>36</sup>. It is however important to point out that the latest socio-economic surveys in 2006 and 2009 provide conservative estimates of production (about 20,000 tonnes annually). This is because seasonal variability is not considered to have been adequately covered and fishing activity carried out without fishing vessels was not considered.

Roughly half of the production is constituted by small pelagics (Bonga shad primarily). Various demersals constitute about 40% of the catch and less than 1% is made up of large pelagics. An important finding is that the catches of crustaceans and molluscs is almost negligible, which is of relevance to possible impacts of artisanal fisheries on industrial shrimp fisheries.

### Industrial fisheries

Declared catches in the industrial fishery in 2008 were just over 53,000 tonnes. Table 16 shows the breakdown of the catch by the fleet segment and type of licence issued). Overall, just half of the production is small pelagic fish, such as mackerel, horse mackerel and sardinellas. About 40% is demersal fish, represented by a large number of species, including breams, sweetlips, croakers, catfishes and soles. Cephalopods account for about 5% of the catch, mainly in the form of cuttlefish and octopus. Shrimp and crabs account for just 2%.

There are essentially two shrimp fisheries targeted by industrial vessels. The deepwater fisher takes place off the continental shelf, targeting deepwater shrimp at depths up to 600m (principally the rose shrimp or gamba (*Parapenaeus longirostris*) and the striped red shrimp or gamba listada (*Aristeus varidens*). The shallow water shrimp fishery targets other penaeid shrimps found much closer to the shore targeting white shrimp (*P. notialis*), tiger shrimp (*P. monodon*) and langostino (*P. trisulcatus*). Spanish and Portuguese vessels target the deep-water shrimp species, which achieve high prices in international markets. Senegalese shrimp vessels, as well as those operating under the Chinese agreement and national/charter vessels prefer to target shallow water shrimp species, with cephalopod and fish as an important by-catch.

The tuna fishery, which is undertaken mainly offshore, accounted for catches of about 2800 tonnes in 2008.

One of the features of the catch profile shown by type of licence in Table 16 is that the demersal fisheries for fish, shrimp and cephalopods are not well targeted. Demersal fish comprise the largest proportion of the catch retained onboard in vessels operating with shrimp and cephalopod licences. With shrimp trawl licences, shrimp only accounts for some 31% of retained catches; in the case of cephalopod licences target species accounts for only 22%. In both fisheries, demersal fish account for almost all of the retained bycatch. The impact of the industrial fisheries for shrimp and cephalopods on non-target demersal fish resources is an important factor to be considered in the sustainability of the fishery.

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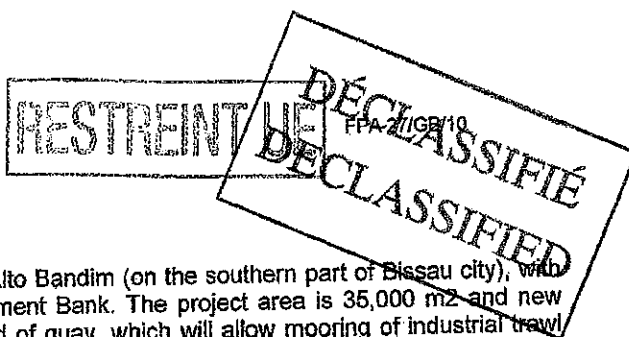
<sup>36</sup> Enquête sur les aspects socio-économiques de la pêche artisanale en Guinée Bissau, 2006 & 2009, Javier Macías González, Projet d'appui au secteur de la pêche (PASP)

**Table 16: Guinea Bissau declared industrial fishery catches, by class of licence 2008**

Class of product	Catches by class of licence issued (kg)						Total	%
	Shrimp	Cephalopod	Demersal	Pelagic fish	Conexa			
Cephalopod	49,758	2,309,987	116,629	-	-	-	2,476,374	5
Demersal fish	2,296,113	7,404,257	6,291,885	3,248,493	2,613,420	-	21,854,168	41
Shrimp/crustacea	1,148,949	49,200	10,989	-	-	-	1,209,138	2
Small Pelagic fish	17,120	801,948	32,465	24,060,617	60	60	24,912,210	47
Tunas	185,876	136,443	48,160	2,422,862	-	-	2,793,341	5
Total	3,697,816	10,701,835	6,500,128	29,731,972	2,613,480	-	53,245,231	100

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### 2.5.3 Shore-based Infrastructure

A new fisheries port is under construction at in Alto Bandim (on the southern part of Bissau city), with grant and loan finance via the African Development Bank. The project area is 35,000 m<sup>2</sup> and new quayside will provide a depth of 5-9m at the end of quay, which will allow mooring of industrial trawl vessels. No funding has been identified for all supporting equipment required, for example fuel depot, which will be an essential service required to attract vessels.

A smaller jetty at Alto Bandim serves the semi-industrial Project financed until now by the Chinese (Project de Pesca Semi-industrial) and the artisanal fisheries. The site is operated by Chinguimar, a Government joint venture with the CNFC. This site includes cold storage facilities (300t capacity) 4 containers (30t capacity each), and 2 flake ice-making facilities (25 tonnes/day). The facilities have fallen into disrepair. The Government of Guinea Bissau is not satisfied with operation and is in the process of considering nationalisation.

There is only one operating fish processing plant in Guinea Bissau, owned by the Afripeche Company, located in Bissau. It has a cold store (1,000 tonnes in two chambers), and a freezing capacity (being extended with a new freezer tunnel to 5 tonnes/day). It has an ice machine with production capacity of 30 tonnes per day. The plant receives about 3-4 tonnes/day from artisanal fishermen (Senegalase) working under contract (mainly bicuda, linguado, bica, sinapa, bagre) and 150 tonnes/ month of small pelagics (sardinella and horse mackerel on a seasonal basis) from 4 chartered vessels targeting these species. Sales are national and regional markets. The plant is in reasonable condition, and has been upgraded to meet EU sanitary requirements (with some technical inputs from CIPA).

A processing plant in Cacheu is not functioning (except for ice production) and is for sale. It is considered feasible to put it into operation with minor investments, this would have a potential production capacity of about 50 tonnes/day.

## 3 FISHERIES AND MARITIME INSTITUTIONS

### 3.1 Ministry of Fisheries

The Ministry of Fisheries and Maritime Economy was founded in 1989. The Minister has a seat in the Council of Ministers. The organisation structure of is shown in Figure 16. The Ministry comprises a General Directorate for Fisheries (DGP) with three service departments (industrial fishing and artisanal fishing, which deal with licensing issues, as well as a service for training). Furthermore, there is CIPA (Centre for Applied Fisheries Research) and FISCAP (Commission on Fisheries Surveillance, responsible for MCS activities), which are both autonomous services under the Ministry of Fisheries. Only CIPA has an updated and functional internal regulation, while that of FISCAP is out of date. Donor funded projects are implemented by the Directorate General for Fisheries. There are several regional fisheries offices, headed by regional fisheries representatives. These liaison offices are mostly tasked to deal with vessel and licence issues in the artisanal sector.

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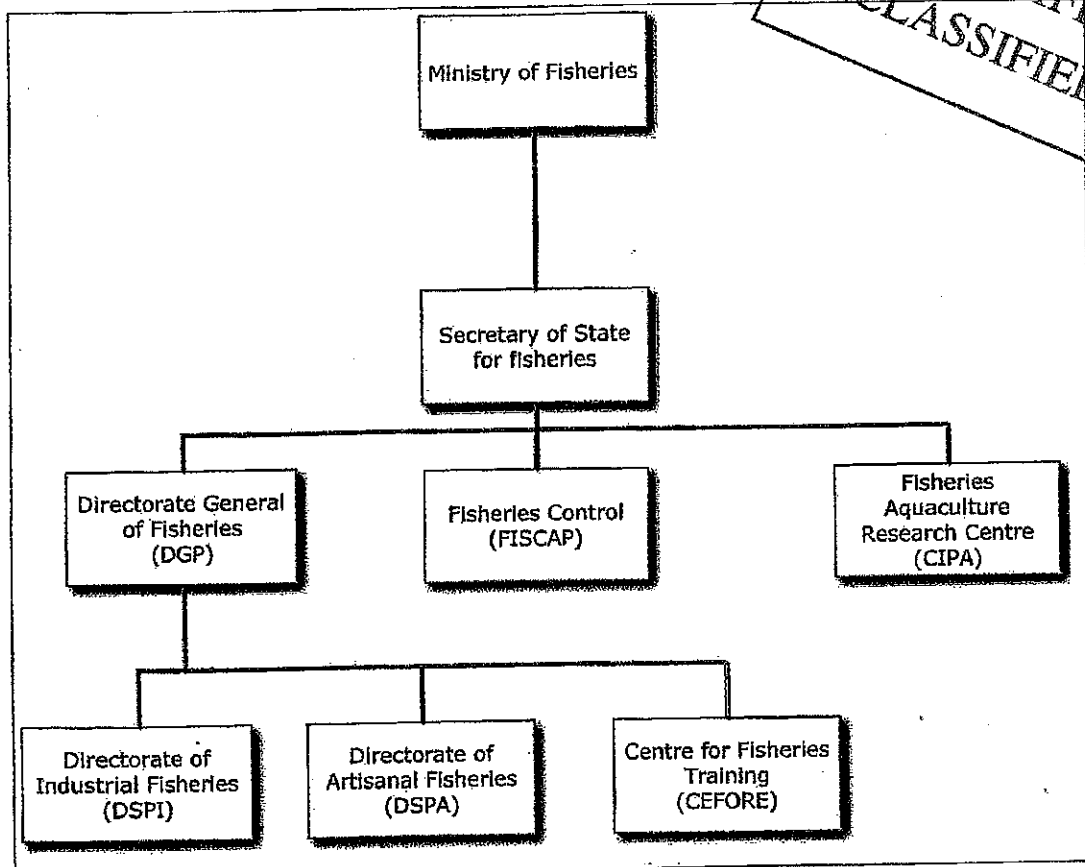


Figure 16: Organisational structure of the Ministry of Fisheries

### 3.1.1 FISCAP

FISCAP is responsible for fisheries monitoring control and surveillance activities. There are 35 fisheries inspectors distributed among 6 operational centres (including Bissau). FISCAP currently owns a reported 15 patrol vessels. The main assets are the Portuguese-built sister ships Cacheu and Cacine, and the smaller Ilha de Caio, and 7 de Junho (a recreational fishing boat turned patrol boat). Cacheu and Cacine are the only vessels with deep-sea patrol capability, but in recent years have not been fully operational. These larger vessels need a full maintenance overhaul. However since 2007, FISCAP has also taken delivery of a number of fast patrol craft (10m, 500HP rigid inflatable) at a cost of about US\$ 200,000. Some have been purchased outright; others are supplied on leasing terms. The marine patrol means available in May 2010 are shown in Table 17.

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**Table 17: Operational Table Patrol craft available to FISCAP, May 2010**

Vessel name	Length (m)	Motor/Power	Autonomy (days)	Base
Cacheu	20	3 X 300	5	Cacheu
Cacine	20	3 x 300	5	Bissau
Caïo	14	2 x 450	4	Bissau
Baleia 1	10.2		1	Cacheu
Baleia 2	10.2		1	Bissau
Baleia 3	12	2 x 400HP	1	Bissau
Baleia 5	10.2	2 x 200HP	2	Bissau
Baleia 6	9	2 x 200HP	1	Caravela
São Barçal	10	200HP	1	Bubaque
Bissiadur	10	20HP	1	Cacine

This investment has enabled FISCAP to implement a substantial level of patrols (at a rate of about 60/year and 180 days at sea in 2008 to 2010). However autonomy is limited to 1 or 2 days. Table 18 shows the level of activities undertaken. The programme has been very successful in apprehending vessels engaged in illegal fishing (both industrial and artisanal). On average each month during the period FISCAP has arrested 2.5 industrial vessel and about 10 pirogues (mainly from Guinea Conakry, Senegalese and in one case, from Mali). Whilst fast marine patrols of some of the trawlable areas have been effective, there is no capacity to project controls to the limit of the EEZ.

**Table 18: Estimated level of maritime surveillance activities by FISCAP**

Surveillance activity	2007	2008	2009	2010*
No. of missions	n/a	63	60	27
No. of days at seas	n/a	189	180	48
No. of industrial vessels inspected	n/a	108	114	77
No. of pirogues inspected	n/a	338	806	118
No. of industrial vessels arrested	27	30	28	13
No. of pirogues arrested	0	54	162	56

\* January to July, Source FISCAP

The level of cooperation with the Navy is almost zero, and in fact the Navy and FISCAP do not agree on responsibilities for fisheries patrols. The Navy reportedly has fewer functional assets than FISCAP. In recent years FISCAP has organised marine patrols without consultation with the Navy. Maintaining the vessels in operational conditions is a constant struggle in terms of finance and technical capacity for maintenance and repairs.

Shore based means of controls are limited. There is limited supervision of transshipment. FISCAP maintains a radio control room, which is operational 18 hours/day. There is no aircraft available for maritime surveillance and only preliminary steps have been taken towards development of satellite

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VMS systems. Previously, there were no functional decentralised MCS bases, and operational means were concentrated in Bissau, located some 60 nm behind the baseline. This is however in the process of changing with the construction / re-modelling of new operational centres in Bissau and Garavéa, which are in the Bijagos Archipelago but these are not expected to be fully operational until 2011 because of budget delays. The next tranche of FPA funds is expected to contribute to its equipping and staffing. These funds will also contribute to reinforce the operational capacity of the base in Cacheu, where one of the larger patrol vessels (also called Cacheu) is based. The construction of MCS operational centres in Uite (Bijagós) and in Cacine (to cover southern Guinea Bissau waters) is pending.

FISCAP operates the observer programme (transferred from CIPA in 2007, reflecting the enforcement, rather than scientific role of observers). The observer corps is about 100 strong, and new observers were recruited and trained in 2008 and 2009. There is now 100% observer coverage of trawler vessels. However the observer programme is under-funded and is not self financing. Until 2010, there was no provision within the state budget for FISCAP, and the observer programme, but this was finally included in 2010. FISCAP does not publish an annual programme or annual report.

### 3.1.2 CIPA

CIPA, the Centro de Investigação de Pesca, is the Directorate of the Ministry of the Fisheries responsible for fisheries research and for provision of management advice to the Government. CIPA was also nominated by the Ministry of Fisheries as the Competent Authority responsible for sanitary controls. CIPA also provides advice to IBAP regarding MPAs. However, pending approval of the new fisheries law, CIPAs formal role is not defined in law.

In terms of fisheries research until 2007 data gathering has been mostly dependent on observers in the industrial fisheries. Since 2007 CIPA has undergone a significant increase in technical capacity with the recruitment of five fisheries biologists (two with MSc degrees), data enumerators and veterinary staff to allow it to fulfil these functions. CIPA has sought to recruit a team of artisanal fisheries enumerators, carry out census surveys on artisanal fisheries and socio-economic and develop its database of industrial fisheries activities. It also participates in fisheries research cruises, necessarily in collaboration with external organisations. However many qualified staff remain in temporary contracts. Regional consultants (from Mauritania) have been recruited to help develop data and statistical systems. With FAO support the MV Fridtjof Nansen carried out pelagic acoustic and demersal surveys on 2006 and 2007 (an update is needed); the Spanish government funded a survey in 2008. Only in 2010 did CIPA receive any formal allocation of funds under the OGE, and it has been almost fully dependent on the FPA support for its operations. Most of the staff have been recruited on temporary contracts only.

However, there is still no clearly expressed national fisheries research plan and there are outstanding technical weaknesses to be addressed. CIPA lacks adequate database software and specialised technical skills in statistics and data treatment, particularly in the case of artisanal fisheries. There is a need for improved skills in terms of stock assessment methodologies and approaches. Despite these limitations, CIPA has been able to produce fisheries management recommendations regularly (e.g. Fisheries Management Plan 2010) in recent years. The 2010 plan only covers the industrial fisheries, but there are plans in 2011 to extend the plan to include artisanal fisheries. The national team will be reinforced by experts from the region (i.e. Mauritania) and the recent creation of a Joint Scientific Committee in the context of the FPA is expected to provide guidance. CIPA's recommendations have helped the Government approach the harmonisation of the fisheries agreements with third countries.

With regard to sanitary controls, CIPA has built up the system from a low base. It has built up the Department of technology, processing and quality control, which is responsible for sanitary inspection functions. It has recruited three veterinary inspectors from the Ministry of Agriculture. With SFP assistance it has prepared an inspection manual, and trained staff in fish inspection, as well as drafting a technical regulation for the official controls (pending approval of the primary fisheries law). In addition the SFP has supplied inspection equipment and has supported the development of an annual monitoring plan. FPA funds have allowed the acquisition of a site for testing laboratory (EUR 318,000); and for a design study. SFP is supplying some equipment and the World Bank PRAO project will also be requested to supply additional requirements. This is unlikely to be commissioned before 2012 at the earliest, and in the meanwhile CIPA is seeking to send samples to Dakar for analysis.