出國報告(出國類別：其他)

參加「經濟合作暨發展組織(OECD)第 120 屆漁業委員會(COFI)」報告

服務機關：行政院農委會漁業署

姓名職稱：楊先耀 專門委員等

派赴國家：法國(巴黎)

出國期間：中華民國 106 年 11 月 12 日至 11 月 18 日

報告日期：中華民國 106 年 12 月 6 日

摘要

一、經濟合作暨發展組織(OECD 第 120 屆漁業委員會(COFI)會議於本(106)年 11 月 14 日至 16 日假法國巴黎 OECD 總部會議中心召開，我國由本署署長室楊先耀專門委員與對外漁協李俞青助理代表出席，我駐法國台北代表處經濟組梅碧琦副組長亦全程陪同出席提供協助。會議主要針對漁業委員會秘書處所研提漁業檢視報告、總體調查、國家篇章、檢視 2015-16 計畫執行、2019-20 工作計畫及預算、指認永續經營漁業管理改革方向、越南漁業及養殖政策、漁業相關貿易談判報告、打擊 IUU 漁業報告、觀察員向 COFI 報告漁業相關漁業活動及觀察員報告等議題進行討論。

二、永續漁業、過度捕撈及產能過剩為相關機關長期關心之議題。與會各方於各向議題討論皆以永續漁業為主軸，延伸至對打擊犯罪如漁業稅務犯罪、打擊 IUU 及其他犯罪表示支持，並特於 COFI 工作計畫及預算與計畫執行中研提未來政策與方向；承各國會前繳交漁業統計估算、國家報告、各項漁業數據及打擊 IUU 問卷，明年將要求各國繳交近十年國家漁業政策，以便供各國達成前述目標之建議。在議題「越南漁業及養殖政策」秘書處特別討論越南遭歐盟舉黃牌案，並盼與各國合作協助解除越南黃牌。

三、多數國代表在會中對補助、漁業統計估算(Fisheries Support Estimate, FSE)及補貼特感興趣；又因世界貿易組織(WTO)為 OECD 合作夥伴之一，並早於 2002 年與 WTO 建立多哈發展議程貿易能力建構資料庫，雙方多年就貿易、補貼、關稅及其他相關議程共同合作，因此如美國、澳洲、日本及紐西蘭等國數次於提及 11 月初 WTO 規則談判小組非正式諮商會議中 OECD 代表之影響力及議題討論，並希望 OECD 在 12 月 WTO 部長會議(MC11)能夠提升其影響力及論及相關核心議題。

目　　錄

壹、目的

一、經濟合作暨發展組織(Organization for Economic Co-operation and Development，簡稱 OECD)成立於 1961，組織係由理事會為最高權力機構；另設立約 250 個不同專門委員會(Committee)、工作小組(Working Party)及專家小組(Expert Group)，針對實質經濟與社會問題進行討論與研究，相關成果做成報告獲建議案提報理事會裁決(共識決)。OECD 素有 WTO 智庫之稱，強調以政策對話方式達致跨國政府間的經濟合作與發展，並建立會員國強而有力的經濟實力，其功能包括(1)提供對話機制，以分享施政經驗、解決共有問題、確認優良施政措施及調和國內與國際之政策實施，以及辦理論壇，藉由同儕壓力來改善政策，達成國際性協議之政策工具，以進一步參與全球化經濟。

二、「漁業」、「鋼鐵」及「競爭」三個 OECD 委員會為我國得以「一般觀察員」身分參與 OECD 之活動，原須每 2 年更新觀察員身分，2012 年起 OECD 更改非會員國參與規則，改由各委員會研擬「全球關係策略」並制定「參與計畫」逕行邀請非會員國以「參與方(Participant)」身分參與，此計畫送交委員理事會核准後，我方參與資格因新規定更動而自動延長至 2013。而漁業委員會(Committee for Fisheries；COFI)之參與計畫於 2013 年七月正式為理事會通過，我方於 COFI 第 112 屆會議首次以「參與方」身分出席該會議。未來仍秉持以實際參與原則，以「參與方」身份定期出席漁業委員會並積極參與漁業委員會所辦之活動，將有助於強化我國與 OECD 及相關國際組織之互動與合作關係，進而提升我國國際能見度與重要性。

三、漁業委員會(Committee for Fisheries；COFI)係以責任制、永續性、全球化及生態和諧等思維為基礎，匯集跨領域、跨地域專家學者意見，研擬當前國際全方位漁業政策改革，進而影響聯合國糧農組織(FAO)及國家之關注與討論。漁業委員會代表團多為各國參與漁業相關組織代表性人物，建立聯繫管道有利於未來國際漁業合作及交流，爰我國宜持續與 COFI 保持密切聯繫，以共同關切議題促進與他國互動，倘有機會在專案計畫合作進行研究，或合辦研討會，能營造有利於參與國際社會條件，營造有利與參國際會議條件，並增加參與程度。

四、我國歷年來積極參與 COFI 相關活動，並於期限內完成、繳交並針對委員會要求修改相關文件。其中包含國家報告、漁業數據及漁業支持估算等皆為定期繳

交文件，今(2017)年更是繳交我國打擊非法、未報告及不受規範(Illegal, Unreported, and Unregulated；IUU)政策問卷，與會中亦分享我方經驗及表達看法。秘書處在彙整各國漁業相關資訊後將其成為國際漁業重要依據，內容涵蓋全球漁業現況暨發展趨勢，該結果能作為我國漁業政策研擬及產業輔導之方向參考。

貳、會議過程

一、 經濟合作暨發展組織(OECD)漁業委員會(COFI)在法國巴黎 OECD 總部於本(2017)年 11 月 14 日至 16 日召開「第 120 屆漁業委員會會議」，我方在我國駐法國台北代表處經濟組梅碧琦副組長陪同下，由本署署長室楊先耀專門委員與對外漁協李俞青助理以「參與方(Participant)」身份出席。

二、 會議成員包含美國、澳洲、英國、歐盟、日本、韓國、聯合國糧農組織（FAO）、世界銀行(WB)、商業與工業諮詢委員會(BIAC)與我國等參與方及秘書處共約 50 餘人與會(出席明單如附件 1)。會議主席係由荷蘭籍 Mr. Leon Lomans 擔任，貿易與農業處資深農業政策顧問 Rachel Bae、研究員 Roger Martini、Woojin Nam 等人列席與會。

三、 會議開始前我方代表與秘書處、其他國代表如阿根廷外交部長(Ms. Reina Sotillo)、日本技術專員(Mr. Hajime Kawamura)、澳洲農業顧問(Ms. Wilhelmine Brown)、印尼海洋事務及漁業部處長及副處長(MMA Saifuddin 及 Ms. Erni Widjajanti)等其他國代表寒暄並交換意見，多數對中國大陸養殖漁業補助及大幅發展深表興趣。會後我方向本次會議主席 Mr. Leon Lomans、秘書處 Roger Martini 及 Antonia Leroy 等人表達感謝之意。

四、 會議係以專家論壇模式進行，原則上先由委員會研擬報告之大綱及方針，委請專家學者報告草案，提供各會員國審查研究後，召開會議供各會員國據實務經驗及施政觀點闡述修正意見，最後由秘書處整合各方意見統一修正後，公佈各國施政及研究參考。

五、 本次會議除議程 11 至 15 限會員國出席外，其餘我方皆列席。議程主要針對漁業委員會秘書處所研提漁業檢視報告、總體調查、國家篇章、檢視 2015-16 計畫執行、2019-20 工作計畫及預算、指認永續經營漁業管理改革方向、越南漁業及養殖政策、漁業相關貿易談判報告、打擊 IUU 漁業報告、觀察員向 COFI 報告漁業相關漁業活動及觀察員報告等議題進行討論。

六、 本次我團出國開會行程如次:

11 月 12、13 日(星期日、一)搭機直飛赴法國巴黎

11 月 14 日(星期二) 參加 OECD-COFI 第 120 屆漁業委員會第 1 日會議

11 月 15 日(星期三) 參加 OECD-COFI 第 120 屆漁業委員會第 2 日會議

11 月 16 日(星期四下午)參加 OECD-COFI 第 120 屆漁業委員會第 3 日會議

參、會議紀要

茲就本(2017)11 月 14 日至 16 日召開「第 120 屆漁業委員會」之會議紀要敘述如下(議程如附件 2)：

11 月 14 日

一、 通過第 120 次會議議程(議程 1)：

會議主席開場並簡介本日議程，特別歡迎印尼首次加入，並經參與方同意就此議程進行。歐盟代表發問在日內瓦 WTO 會議時，OECD 代表是否達成任何談判，Rachel 表示僅在幾項議題上提供看法。

二、農業政策顧問 Rachel Bae 聲明(議程 2)：

Rachel 表示委員會對於稅務及打擊犯罪及漁業計算估計(FSE)非常重視，並希望後續在 FSE 計畫能加強發展可能性。

三、 OECD 漁業檢視報告(議程 3)：

(一) 總體調查(3b)：

1.針對總體調查目標討論，依照國家篇章中政策變化及方便各國了解其他繳交資料國之國家漁業狀況修改。

2.因中國為主要漁業生產國，今年其提供資料對總體分析影 響甚大，爰此在總體調查中為成為重要分析數據。雖總體調查主軸為永續漁業、過度捕撈及產能過剩，但卸漁量逐年減少，對產業收益影響甚大。依數據分析，OECD 區域水產養殖漁業及補助中，中國為最高之國，而補助高低與卸魚值之間為正向關係。

3. 依各繳交資料國家數據顯示，2000 年因減船比例高而產量也因此更少，這樣的趨勢也仍持續發展中。

4. 紐西蘭對稅務打擊犯罪及打擊 IUU 議題表示非常歡迎並肯定其對於紐西蘭價值。

(二) 國家篇章(3c)：對今年繳交之篇章與過去之差異進行討論，今年加入五國(包含哥倫比亞及立陶宛等)，但排除英國。

(三) 2017 漁業檢視報告過程之回饋(3d)：

1. 秘書處就繳交數據資料之回饋對計畫發展重要性進行解說。明年會就回饋改善及提升各國回應情形。

2. 今年任何有關魚種統計數據皆是以 FAO 的(Aquatic Sciences and Fisheries Information System, ASFIS list)分類，此是為排除魚種重複計算問題，並可改善數據回收。

四、討論：檢視 2015-16 計畫執行(議程 4)：

(一) 是為了解如何使參與國改善其國內相關政策。秘書處表示今日希望就各國對此計畫提出意見，雖初步已請會員國提供資料，但卻未達高回復率。

(二) 紐西蘭表示調查所要求資訊並不是很清楚導致仍需國內進行討論來完成該調查。美國表示因漁業與農業相關性極高及其複雜性，5 至 10 年政策資料很耗時並牽扯許多議題，且若為出版品，將顧慮國家對外發表內容。

(三) 秘書處表示參與國相關人員幾乎為高階政策官，但也理解各國考量，但 OECD 之政策有責任執行這些計畫並提供各國相關分析結果，因此期待各國提供意見，且將於改善後決定參與計畫對象為何。美國及南韓詢問 PIR 是否可和工作計畫及預算(Program of Work and Budget, PWB)之活動同步? 秘書處認為 PIR 可做為 PWB 的基礎。

五、初步討論：2019-20 年工作計畫及預算(PWB)(議程 5)：

(一) 歐盟代表希望看到多就漁業、永續經營及經濟之間關係多做分析。另外，歐盟代表表示養殖漁業及消費者之間關係是歐盟一直非常關切議題之一，OECD 可多朝這方向擬定計畫。阿根廷同意歐盟有關養殖議題重要性，但魚群狀態及環境棲地影響(ecological habitat impact)研究是目前阿根廷希望看到的發展。

(二) 加拿大代表表示應非僅強調永續漁業，應和環境委員會連結，海洋產業及其他部門之連結同為重要一環，並表示 OECD 代表於 WTO 部長會議應提升影響力。

(三) 美國代表希望看到 OECD 就養殖證照發展及 WTO MC11 之影響、漁業可追溯性及經濟影響。

(四) 多國同意希望加入藍色經濟倡議(BGI)相關研究及活動，並同時希望 OECD 在 WTO 部長會議可表達意見並提升影響力。

11 月 15 日

六、指認永續經營漁業管理改革方向(議題 6)：

(一) 主要是希望透過連結各國所提供 2005 至 2016 年政策改革及研究資料完成此計畫，並提供各國改革最佳發展方向。目標是為透過改革漁業管理來擴張社會經濟權益，同時維繫保育及提高對海洋生態系統及魚群狀態之專注力。

(二) 問卷：第一部分是政策工具及管理實踐，第二部分是改革過程，此計畫結果討論將納入第 121 屆會議討論，標題為“Making Reform Happen for Sustainable Fisheries”。

(三) 各國統整建議如次：

1. 歐盟：須就結構、不同時期轉換因素、過程及目標等皆需納入考量，非僅目前問卷內容，因各國變化差異甚廣，更需要更清楚定義問卷中各項問題而非認定各國能夠理解，應再改革及擴展。

2. 加拿大、澳洲：雖此計畫非為實際推動政策而言，為使各國政府更能執行此計畫，委員會須就計畫最終目的及數據用處提供更詳細解說。

3. 法國：

(1) 應就各國尚未完成之管理改革而非過去失敗計畫或對外發表國家缺點。以法國為例，依選擇而言，漁業產業及小型漁業為兩項法國認定在改革上有較大差異，而就挪威所提，國際漁業政策影響極大，如中國大陸養殖發展或漁業壯大情況。OECD 應針對這方向進行研究又或其他國可能於其中有相關利益關係，可能導致更多問題，爰此更大的問題是各國在如 RFMO 立場將影響政策發展、經濟及永續漁業等議題發展。

(2) 此計畫應同時顧及漁民及相關計畫，且計畫目的仍不明顯，因依照 OECD 分析，並未納入像法國多為小型漁業，或是發展中國家和已發展國家之間競爭。

七、第一天會議摘要(議程 7)及國家研究：就第一日會議摘要，各國提供修改意見，秘書處表示摘要主是朝大方向表達整體意見而非各別國家想法。

八、越南漁業及養殖政策(議程 8)：

(一) 由澳洲贊助及秘書處共同建立之計畫，希望各國若和越南政府或相關單位有聯繫窗口及方式可提供 OECD 參考。

(二) 近期歐盟對越南舉黃牌，秘書處提供相關新聞資料，並希望歐盟可發表想法。歐盟代表表示同意越南目前行動計畫改善，並期待越南後續管理改革，因時機尚未成熟，歐盟認為目前不適合加入 OECD 討論範圍。秘書處表示可協助歐盟在越南改革提供建議，但歐盟表示可獨力完成相關作業，OECD 可不提供協助。

(三) 紐西蘭及澳洲同意秘書處可協助越南往更佳方向改善打擊 IUU 漁業。

九、漁業相關貿易談判報告(議程 9)：

(一) 漁業計算估計:統整中國及多國資料，因此受到相關參與機關及 WTO 正面回應，並因同時和 IUU、過度捕撈及過度產能等議題作連結更能提升資料使用度。目前希望加入更多國家，但也同時考量不含括過多國家增加複雜度。議題預計加入燃料稅減免、養殖漁業及社會權益及規則等。

(二) 漁業政策評估模型(fisheries policies evaluation model, Fisheries PEM)：目前此項政策分析模型仍為初階，針對單一魚種、單一漁業類別及單一魚種輸出(output)結果分析。

(三) 美國表示希望 WTO 12 月部長會議會出現較具重量字眼，但可惜是 11 月初 WTO 會議就海洋產業相關議題卻沒有太多著墨，希望在這塊能夠有更多連結。

(四) 秘書處回應此項模型為長期發展型，目的是就大面向進行評估，若過多魚種分析將失去原意。希望探討如何符合現實執行此模型，因此是由科學家就各魚種狀況之架構進行分析，而實際上也無一般模型作為參考。但若針對生物型模型並非此項計畫目的，不過 WTO 是作為此模型最佳基準以便提升及了解漁業政策間如何互動，這將是最能符合大眾及 COFI 目標的方式。

十、打擊 IUU 漁業報告(議程 10)：

(一) 秘書處感謝各國完成繳交 IUU 問卷(包含我國)，並就進度報告。因某些國家未完成問卷，相關結果將於下次會議提供。後續將與其他 RFMO 交流更新相關資訊。

(二) 秘書處表示此問卷是先行瞭解各國目前狀況如何與全球現況，並會持續與各組織合作，但此問卷仍不是為實際操作為最終目標。

議程 11 至 15 限會員國出席

11 月 16 日(下午)

16 日會議開始前，經駐法代表處梅碧琦副組長引介與歐盟代表交換名片寒暄，對方表示名片用完，將由電郵與我方聯繫。

十一、第二天會議摘要(議程 16)：僅就秘書處提供之摘要文字修正。

十二、漁業相關活動報告(議程 17)：

(一)海洋經濟：主就海洋經濟進行研究、海洋養殖產業，至 2030 年在產業捕撈漁業及產業海洋養殖漁業將大大提升。方法:加強海洋相關資訊，使用經濟分析及補償及加強科技及創新。

(二) 科學、科技及創新計劃 (Science, Technology, and Innovation Projects, STI projects)：關注永續海洋經濟創新 2017-2018─探索進階科學角色及啟用, 拓展及分析最新及出現合作架構, 延伸經濟評估界限(frontier)、分析、及工具及指認最佳實踐及成功政策決策者。

(三) 環境之生物多樣性工作小組(Working Party Biodiversity Work of Environment, WPBWE)：包含兩項案例研究、海洋保護區(MPAs)相關書籍、生物多樣性政策及發展研究及其他相關活動。

(四) 綠色成長及永續發展(The Green Growth and Sustainable Development, GGSD)：將於 11 月 20 至 22 日召開 11 月 20 至 24 日將舉行海洋經濟週。重點議題如次:

1. 綠色化經濟(Greening the Economy)：以投資、創新及僱用為主軸

2. 何種計畫可提升 SDG14？

3. 海洋廢棄物如何影響食物鏈

4. 犯罪活動：非法、未報告漁業活動及非法販運

5. 如何鑒定知識代溝？

十三、觀察員報告(議程 18)：

(一) 商業與工業諮詢委員會(BIAC)：目前正為漁業相關管理工具準備相關報告，相關決定、漁業權益進入等皆納入議題考量。五月將召開相關工作坊。

(二) 世界銀行(World Bank)：漁業相關活動及相關全球知識皆為世界銀行所關切。世界銀行自從與 OECD 合作後，漁業部門已開始拓展(10 億美元)，也希望能與 OECD 就漁業補貼進行合作，同時也就氣候變遷與漁業成立工作室。

(三) 聯合國糧農組織(FAO)：代表表示感謝在座代表出席韓國釜山之貿易次委員會(COFI-FT)會議，而結果報告將在 FAO 網站。該會下一屆將於西班牙召開，而漁業委員會會議(COFI 33)將於明年 7 月於羅馬召開。

(四) 我國就 5 月第 119 屆會議所報告臺灣打擊 IUU 所做努力發表將持續於各項計畫繼續努力。

十四、會員國報告有關 COFI 的活動(議程 19):美國重視其國家海洋委員會(NOC)之海產進口監控計畫(Seafood Import Monitoring Program, SIMP) 規定、可追溯性及數據保留計畫，其中僅包含 13 種魚種。而為了規範及提升打擊 IUU 漁業，期盼未來能拓展至其他魚種。

備註：明年第 121 屆漁業委員會將於 5 月 2 日至 4 日召開。

肆、心得與建議

一、 永續漁業、打擊非法、未報告及不受規範漁業(IUU)、水產品證照及漁業貿易談判皆為各國及漁業相關組織特別關切之議題，又其中打擊 IUU 犯罪往往與其他重大議題如人口販運、洗錢、走私及毒品交易等息息相關。而非法漁業為聯合國永續發展(Sustainable Development Goals)中受高重視之議題，爰此 OECD-COFI 亦逐年增加相關議題之計畫、研究及分析等，並研擬結果報告與彙整各國所提供之資料及意見交流，提供各國、相關組織及 OECD 合作之組織等政策或管理建議。

二、 本次會議因主軸係針對各國繳交資料、未來 COFI 計畫及各項計畫執行成果進行討論，各國仍對過去談論過議題內容如貿易、稅務、補貼及越南遭歐盟舉黃牌案表高度興趣，唯今年會議與過去最大差異為各國踴躍發言情形，且多國不約而同對 12 月 WTO 部長會議(MC11)及貿易議題表示極大興趣，並特別盼出席部長會議之 OECD 代表可多討論漁業相關議題。

三、 OECD 多年來與多國合作又與多重要組織成為合作夥伴，爰 OECD 或 COFI 成為國家及組織信任之智庫，提供匯集各專家意見並研擬未來漁業政策改革及漁業管理趨勢。而該委員會提出之資料為我國關注議題提供改革或管理上建議，並能延續專業性及與他國及組織跟上國際趨勢。綜上，我國應積極出席 COFI 一年兩次之會議，而非視會議情形又或我國所關切議題而出席；另，開會期間多國希望我國就中國大陸漁業發展表示看法，又因我國歷年來都如期繳交國家報告、漁業相關數據及預算，今年又提供我國打擊 IUU 政策及相關措施，秘書處感謝我國所作努力，爰我方更應積極並考量我國「參與方」權益之保險，如我國出席 OECD「鋼鐵」及「競爭」委員會代表團與秘書處保持友好關係，以便他日有組織可支持我國所推動之政策、改革或計畫等。

四、 承上，此次會外時間，駐法國台北代表處經濟組副組長多次向我方表示因專業領域考量、與他國交流聯繫及與秘書處保持密切關係等原因，希望漁業署慎重考量每次會議皆派員出席，能同時確保訊息接收及權益維繫之完整性。

Participants List for Fisheries Committee (COFI)
Liste des Participants pour Comité des pêcheries (COFI)

14/11/2017 - 16/11/2017

All Sessions

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Organisation for Economic Co-operation and Development

TAD/FI/A(2017)2

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13 October 2017

TRADE AND AGRICULTURE DIRECTORATE
FISHERIES COMMITTEE

Cancels & replaces the same document of 2 October 2017

DRAFT AGENDA TO THE 120th SESSION OF THE FISHERIES COMMITTEE

14-16 November 2017
Paris, France

Changes from previous issue of Draft Agenda:

- Modification to Item 3c: Country chapters;
- Modifications to the Item "Preliminary discussion on the 2019-20 Programme of Work and Budget" which was item 4 and is now item 5;
- Insertion of new Item 4 : "Discussion of the Programme Implementation Review (PIR) results for 2015-16";
- The item "COFI Global Relations Strategy and associated Participation Plan", which was item 4 has been moved and is now item 11.

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JT03420693

DRAFT AGENDA: 120th Session of the Fisheries Committee

	DAY 1: Tuesday 14 November 2017	
Item 1 09:30-09:40	Adoption of the Draft Agenda for the 120th Session	**For adoption** TAD/FI/A(2017)2
Item 2 09:40-10:00	**Statement by Ms. Rachel Bae, Senior Counsellor, Trade and Agriculture Directorate**	**For information**
Item 3	**OECD Review of Fisheries** This work is mandated under the 2017-18 PWB of the COFI - Expected Output Result 3.2.3.4.1 OECD Review of Fisheries. *Woojin Nam* (woojin.nam@oecd.org) *Roger Martini* (roger.martini@oecd.org)	
Item 3a 10:00-10:30	**Information on publication timing constraints and on the communication strategy** *Woojin Nam* (woojin.nam@oecd.org)	**For information**
10:30-11:00	***Break***	
Item 3b 11:00-12:30	**General survey** The general survey has been revised according to comments received on the first version posted on OLIS on 15 September. It is presented for declassification. *James Innes* (james.innes@oecd.org) *Roger Martini* (roger.martini@oecd.org)	**For declassification** TAD/FI(2017)14
Item 3c 12:30-13:00	**Country chapters** Country chapters have been cleared in advance with members for information and to ensure the accuracy. The Secretariat will comment on the process that led to their preparation *Woojin Nam* (woojin.nam@oecd.org)	**For discussion** TAD/FI(2017)18
13:00-14:30	***Lunch***	

Item 3d 14:30-15:30	**Reflections on the 2017 Review of Fisheries process** The Secretariat will comment on the process that led to the preparation of the 2017 Review of Fisheries, including statistics and data collection. Delegates are kindly invited to share their views on this part of our work and how we may improve it in the future. *Fabiana Cerasa* (fabiana.cerasa@oecd.org) *Roger Martini* (roger.martini@oecd.org)	**For information**
15:30-16:00	***Break***	
Item 4 16:00-16:30	**Discussion of the Programme Implementation Review (PIR) results for 2015-16** The Secretariat will present the results of the PIR for the 2015-16 Programme of Work and Budget (PWB). Within a month of the 120th COFI meeting, statements from the COFI Chair and TAD Director will be submitted on the PWB portal summarising findings, observations and suggestions. Delegates are kindly invited to comment on the PIR results and make suggestions as to how the COFI can collectively move towards better results, notably in terms of impact of its work. *Roger Martini* (roger.martini@oecd.org)	**For discussion** TAD/FI(2017)12
Item 5 16:30-18:00	**Preliminary discussion on the 2019-20 Programme of Work and Budget** In advance of the meeting, the Secretariat will make available a note on the broad analytical and policy priorities that could be addressed in the 2019-2020 Programme of Work and Budget of the Committee. Under this item, the Committee will be invited to discuss possible areas for future work. Based on this discussion, the Secretariat will provide a revised note before the end of 2017 highlighting the major elements of possible future work. This note will solicit written comments from delegates. Those comments will inform a preliminary draft PWB 2019-20, which will be provided to delegations in advance of the Committee meeting in May 2018. At that meeting, delegations will be invited to discuss and to agree upon their priorities for the coming period, by consensus. *Rachel Bae* (rachel.bae@oecd.org) *Franck Jesus* (franck.jesus@oecd.org).	**For discussion** TAD/FI(2017)15

	DAY 2: 15 November 2017	
Item 6 09:30-11:00	**Identifying reform pathways for sustainable fisheries management** This document is an intermediary input in the work mandated under the 2017-18 PWB of the COFI - Expected Output 3.2.3.3.2 *Identifying reform pathways for sustainable fisheries management.* It contains an analytical framework as well as an associated questionnaire. The questionnaire has kindly been tested by 2 member countries and their feedback has been integrated in the version that is presented and will be sent to all delegations shortly after the meeting. Delegates are kindly invited to comment on the analytical framework. *Claire Delpeuch* (claire.delpeuch@oecd.org)	**For discussion** TAD/FI(2017)13
11:00-11:30	***Break***	
Item 7 11:30-12:00	**Summary record of the first day** The draft summary record for the first day of the meeting will be discussed. The draft will have been distributed in the room on the morning of the second day.	**For discussion**
Item 8 12:00-12:30	**Country study of fisheries and aquaculture policy in Viet Nam** A voluntary contribution has been provided for a study of the fisheries and aquaculture sectors in Viet Nam. This item will take stock of the project and invite feedback from delegates. *Claire Delpeuch* (claire.delpeuch@oecd.org) *Basia Hutniczak* (barbara.hutniczak@oecd.org)	**For discussion**
12:30-14:00	***Lunch***	
Item 9 14:00-15:30	**Informing fisheries-related trade negotiations** This work is mandated under the 2017-18 PWB of the COFI - Expected Output 3.2.3.4.5 *Informing Fisheries-Related Trade Negotiations*. The document explains the underlying rationale and outlines the structure of a model to investigate the effects of different FSE categories on indicators of interest, as previewed in the May 2017 report "Support to Fisheries: Levels and impacts." Delegates are kindly invited to comment on the proposed elements of the model. Based on comments received, a work plan for model development over the course of 2018 will be developed. *Roger Martini* (roger.martini@oecd.org) *James Innes* (james.innes@oecd.org)	**For discussion** TAD/FI(2017)17

15:30-16:00	***Break***	
Item 10 16:00-17:00	**Combatting illegal, unreported or unregulated fishing** This document is an intermediary input in the work mandated under the 2017-18 PWB of the COFI - Expected Output 3.2.3.3.1 C*ombatting Illegal, Unreported or Unregulated Fishing*. It takes stock of the data and information collection process and progress made in analysing the information. Delegates are kindly invited to provide feedback and complete their data and information submissions. *Antonia Leroy* (antonia.leroy@oecd.org)	**For discussion** TAD/FI(2017)16
Item 11 17:00-17:30	The Global Relations Strategy (GRS) and associated Participation Plan (PP) need to be updated by the COFI. The proposed revisions reflect recent developments in global fisheries, COFI's efforts to develop and enhance cooperation with Partners and recent developments related to accession of new members to the OECD. Delegates are kindly asked to approve the GRS and the submission of the associated PP to the Council for approval, via the External Relations *Claire Delpeuch* (claire.delpeuch@oecd.org)	**For discussion** TAD/FI(2017)11
Item 12 17:30-18:00	**Bureau election (Confidential item)**	**For decision**
	DAY 3 : 16 November 2017	
Item 13 09:30-10:30	**Accession Review of Lithuania (Confidential item)** The Accession Review of Lithuania is presented for discussion and approval. A presentation will be given by the Lithuanian Vice-Minister responsible for fisheries. Delegates are kindly invited to ask questions and provide comments. *Roger Martini* (roger.martini@oecd.org)	**For decision** TAD/FI/ACS(2017)1
Item 14 10:30-11:00	**Formal opinion on Accession of Lithuania (Confidential item)** The Formal Opinion will be tabled for discussion and adoption. *Roger Martini* (roger.martini@oecd.org)	**For decision** TAD/FI/ACS(2017)2
11:00-11:30	***Break***	

Item 15 11:30-12:30	**Preliminary discussion on the Accession Review of Costa Rica (Confidential item)** The COFI will be briefed on the current state of play of the Accession Review of Costa Rica and invited to engage in a preliminary discussion on the basis of an introductory presentation from the Secretariat and an intervention from Mr. Luis Felipe Arauz Cavallini, Minister of Agriculture and Livestock of Costa Rica. The Accession Review and Formal Opinion will be submitted for adoption by delegates at a later stage, possibly through written procedure or at the next COFI meeting. *Claire Delpeuch* (claire.delpeuch@oecd.org)	**For discussion**
Item 16 12:30-13:00	**Summary record of the second day** The draft summary record for the second day of the meeting will be discussed. The draft will be distributed in the room on the morning of the third day	**For discussion**
13:00-14:30	***Lunch***	
Item 17 14:30-15:30	**Report on activities related to fisheries** As has been established practice, the Secretariat will inform delegates about projects in other parts of the OECD that have relevance for the work of COFI. Representatives from different parts of the OECD will provide briefings on their work. *Basia Hutniczak* (barbara.hutniczak@oecd.org) *Stephanie Lincourt* (stephanie.lincourt@oecd.org)	**For information** TAD/FI/RD(2017)4
Item 18 15:30-15:45	**Report from Observers** Oral reports from Participants and Regular Observer international organisations are welcome.	**For information**
Item 19 15:45-16:30	**Report from Member Countries on activities of relevance to COFI** Oral reports from Delegations are welcome.	**For information**
16:30-17:00	***Break***	
Item 20 17:00-18:00	**Adoption of the summary record of the 120th session of the Fisheries Committee**	**For approval** TAD/FI/M(2017)2

Organisation for Economic Co-operation and Development

TAD/FI/RD(2017)5

For Official Use **English - Or. English**

7 November 2017

TRADE AND AGRICULTURE DIRECTORATE
FISHERIES COMMITTEE

RESULTS OF THE PIR SURVEY FOR THE 2015-16 PROGRAMME OF WORK

120th Session of the Fisheries Committee

This report is presented for DISCUSSION under item 4 of the draft agenda. The Programme Implementation report (PIR) is a key component of the OECD's Integrated Management Cycle and completes the biennial Programme of Work and Budget (PWB) cycle. The results for the 2015-16 PWB are presented. Delegates are kindly invited to comment on the PIR results and provide input into the written response that the Chair will write.

Contact: Roger Martini (roger.martini@oecd.org)

JT03422462

Note by the Secretariat

This report is presented for DISCUSSION under item 4 of the draft agenda. The Programme Implementation report (PIR) is a key component of the OECD's Integrated Management Cycle and completes the biennial Programme of Work and Budget (PWB) cycle. The results for the 2015-16 PWB are presented. Delegates are kindly invited to comment on the PIR results and provide input into the written response that the Chair will write.

RESULTS OF THE PIR SURVEY FOR THE 2015-16 PROGRAMME OF WORK

1.1. The 2015-16 Programme Implementation Report

1. The Programme Implementation report (PIR) is a key component of the OECD's Integrated Management Cycle and completes the biennial Programme of Work and Budget (PWB) cycle. As a major reporting and evaluation exercise, the PIR assesses performance over the biennium offering important insights into the level of satisfaction from end users in capitals on the quality and policy relevance of the OECD's work.

2. The main purposes of the PIR are:

- Reporting and evaluation: Showing Members how the OECD performed overall in the last biennium;
- Committee effectiveness: Informing each Committee how it might improve its performance through adjusting its priorities or choices of outputs; and
- Organisational effectiveness: Identifying areas to increase the impact of the OECD and its outputs

3. Performance is assessed based on six standard performance indicators:

- Cost, quantity and timeliness provided through regular Committee Progress Reports and
- Quality, usage and impact assessment obtained through the PIR end-user survey.

4. The PIR Survey for the PWB 2015-16 was launched in April 2017. Surveys are mailed out to all those registered as COFI delegates, plus any others identified as end-users by permanent delegations to the OECD. The survey was open for 2 months (from 7 April to 31 May), although the Survey was left open for delegations to seek additional feedback when required during the Institutional Response phase. Final responses from delegations were provided on 10 August. Permanent Delegations provide a single moderated formal rating response for each Output Result based on all the survey responses they receive.

1.2. Summary of Survey Results

5. The PIR Survey for the OECD as a whole included 166 substantive output results. All member countries and the EU participated in the Survey and results confirmed the following:

- 99% of substantive Part I resources supported output results rated "High" or above for QUALITY.

- 57% of substantive Part I resources supported output results rated "High" or above for IMPACT.
- USAGE statements provide evidence of how outputs are used by policy makers in capitals. 73% of respondents reported using output results as a basis for policy change or as a reference in policy discussions (higher usage categories—see Annex for usage statements for COFI Output Results).

6. The Fisheries Committee's most recent PIR Survey results reflect a decline in quality over previous Surveys where Output Results had been rated as "High" (Table 1). In 2015-16, the quality ratings were:

- "Medium/High" quality for 3.2.3.3. *Monitoring, Evaluation and Statistics of Fisheries Policies*
- "Medium" quality for 3.2.3.4 *Fisheries & Aquaculture Innovation – Advancing the Green Growth Agenda*

7. Impact ratings in the 2015-16 Survey for the two Output Results remained constant with the previous 2013-14 Survey – both outputs received Impact ratings of "Medium".

8. All products that are completed by the end of the PWB period (end 2016 in this case) in each Output Result are included in the PIR. Projects that are only finalised in the following PWB period are omitted from the PIR. In the case of the Aquaculture Licensing project, the final report was declassified by COFI in 2016 but the final version with /FINAL appended to its COTE was not uploaded on OLIS. This resulted in this product not being found by the automated process that generates the PIR survey.

9. Of the OECD's total 166 Output Results rated in the 2015-16 Survey, the Fisheries Committee's two output results were among only four that were not rated as high quality by a majority of responding Members. Ten of the twenty Members responding to the question on quality for Output Result *3.2.3.3. Monitoring, Evaluation and Statistics of Fisheries Policies* reported "high" or "very high." Four of eighteen Members rated the impact of this Output Result as "high" or "very high" (see Annex). The products evaluated for this Output Result were the Fisheries Support Estimate (FSE) database and the 2015 OECD Review of Fisheries along with its country statistics.

10. For Output Result *3.2.3.4. Fisheries & Aquaculture Innovation*, four of the twenty Members responding to the question on quality reported "high" or "very high," while two of twelve respondents rated the impact of this Output Results as "high," with none reporting a "very high" impact. The only product evaluated for this output result was the *Fisheries and Aquaculture Innovation Platform* (FAIP).

Table 1. Ratings by Output Area and by Output Result

3.2.3 Agriculture and Fisheries Sustainability

				Quality				Impact				Usage				Resources				
Output Result	Output Result Title	Number of Responses	Response Rate	Mode	Median	Mean	Rating	Mode	Median	Mean	Rating	Policy Change	Used as a Reference	Has Potential	Not Used	Part I Budget	CPF	VCs	Total TEC	%VC/TEC
3.2.3.3	Monitoring, Evaluation and Statistics of Fisheries Policies (one publication, two reports, one database, one inventory)	20	56%	4	3.5	3.55	Medium/High	3	3	2.94	Medium	1	11	5	1	878,700	-	-	878,700	0%
3.2.3.4	Fisheries & Aquaculture Innovation - Advancing the Green Growth Agenda (one publication, web exchange/clearing house)	20	56%	3	3	3.2	Medium	3	3	3	Medium	1	4	4	3	691,400	-	-	691,400	0%

Source: From the results of the PIR survey.

1.3. Discussion

11. Substantive committees are asked to give appropriate consideration to discussions on PIR results and the underlying explanations for those results as they seek to improve performance and increase the relevance of their work. These discussions will serve to inform their subsequent PWBs and will contribute to discussions in the Budget Committee on the overall PIR results. Identifying the reasons behind the quality rating decline can lead to actions that the Committee might pursue to improve the quality and potential impact of its work for their policy makers.

12. In light of past PIR results and the last In-Depth Evaluation (IDE) of the Fisheries Committee, Delegates have already been acting to improve the relevance, quality and impact of its work. The Strategy of the COFI [TAD/FI(2015)13] was developed in response, and the 2017-18 PWB has been influenced by these concerns. These actions have set the stage for improvement in the Committee's output and eventually the PIR results, but it is too early at this stage for this to be visible.

13. One of the key products for Output Result 3.2.3.4. *Fisheries & Aquaculture Innovation*, the report on Aquaculture Licensing [TAD/FI(2015)11], was not included as part of the products surveyed due to a technical delay. As a result only the FAIP was listed for rating for this output result. This means that the PIR results are not a complete view of this Output Results.

14. The FAIP was already the subject of some concern on the part of delegates regarding its impact. The main objective for this product in the 2017-18 PWB is to improve its quality and impact, and the Committee decided to re-evaluate this product at the end of the PWB.

15. The FAIP has also been improved, with an annually-updated reporting of patent statistics and other changes in visual presentation and content. The result of this has been that it has become one of the most-visited OECD special-purpose websites. Monthly visit statistics for the innovation database increased from 28 in March 2016 to 352 in August 2017. That said, the impact of the platform for policy makers may still need improvement.

16. The FSE has been a major part of the 2017-18 PWB under the item *Informing Fisheries-Related Trade Negotiations*. It has gone from a development phase into regular production, and the number of countries and policies included in the database continues to increase, including importantly China. Its quality and impact may be expected to improve as a result of this evolution.

17. The OECD Review of Fisheries has also been considerably revised, in part in response to previous low PIR ratings. The results of these changes will be reflected in the next PIR survey, but are not captured in this one.

18. One possible factor for the lower than average results in the PIR could be the response rate of end-users of the Committee's products in the Survey. Usage data indicates that a number of Member countries fully implicated in the work of the Fisheries Committee did not provide an institutional response to the Survey.

19. Making key end users in capitals aware of the survey and improving the response rate will make the PIR a more useful source of feedback for the Committee. Delegates will be informed of the distribution of the PIR survey through Delegates' Corner so that they may contact their permanent delegations regarding participation.

20. Following the 120th Session, the Director of TAD and the Chair will provide written statements on the Committee's PIR results, informed by input from delegates. These statements will be consolidated into a report to be presented for consideration by the Budget Committee.

Annex A. PIR 2015-16 Survey results – Fisheries Committee

Table A A.1. Quality, impact and usage by output result

3.2.3.3 Monitoring, Evaluation and Statistics of Fisheries Policies (one publication, two reports, one database, one inventory)

Country	Quality	Impact	Usage
Chile	**Very High**	High	Has potential for authoritative use in policy development in your capital.
Italy	**Very High**	High	Used as a reference (data or analysis) for policy discussion
Czech Republic	High	Low	A basis for policy change
Denmark	High	Medium	Used as a reference (data or analysis) for policy discussion
Estonia	High	Medium	Has potential for authoritative use in policy development in your capital.
Hungary	High	No Response	Not used
Korea	High	High	Has potential for authoritative use in policy development in your capital.
Netherlands	High	Medium	Used as a reference (data or analysis) for policy discussion
Poland	High	Low	Has potential for authoritative use in policy development in your capital.
Portugal	High	Medium	Other
Australia	Medium	Medium	Used as a reference (data or analysis) for policy discussion
Belgium	Medium	No Response	I am not best placed to comment on the usage of these products by my Government
Canada	Medium	Low	Used as a reference (data or analysis) for policy discussion
Spain	Medium	Medium	Used as a reference (data or analysis) for policy discussion
Japan	Medium	Medium	Used as a reference (data or analysis) for policy discussion
Latvia	Medium	Medium	Used as a reference (data or analysis) for policy discussion
Sweden	Medium	Medium	Used as a reference (data or analysis) for policy discussion
Turkey	Medium	Medium	Used as a reference (data or analysis) for policy discussion
United States	Medium	Medium	Has potential for authoritative use in policy development in your capital.
Israel	Low	Low	Used as a reference (data or analysis) for policy discussion
Austria	No Response	No Response	I am not best placed to comment on the usage of these products by my Government
Switzerland	No Response	No Response	I am not best placed to comment on the usage of these products by my Government
Germany	No Response	No Response	I am not best placed to comment on the usage of these products by my Government
Finland	No Response	No Response	I am not best placed to comment on the usage of these products by my Government
France	No Response	No Response	I am not best placed to comment on the usage of these products by my Government
United Kingdom	No Response	No Response	I am not best placed to comment on the usage of these products by my Government
Greece	No Response	No Response	I am not best placed to comment on the usage of these products by my Government
Iceland	No Response	No Response	I am not best placed to comment on the usage of these products by my Government
Luxembourg	No Response	No Response	I am not best placed to comment on the usage of these products by my Government
Mexico	No Response	No Response	I am not best placed to comment on the usage of these products by my Government
Norway	No Response	No Response	I am not best placed to comment on the usage of these products by my Government
Slovenia	No Response	No Response	I am not best placed to comment on the usage of these products by my Government
Slovak Republic	No Response	No Response	I am not best placed to comment on the usage of these products by my Government

3.2.3.4 Fisheries & Aquaculture Innovation - Advancing the Green Growth Agenda (one publication, web exchange/clearing house)

Country	Quality	Impact	Usage
Chile	Very High	Medium	Used as a reference (data or analysis) for policy discussion
Italy	Very High	High	Has potential for authoritative use in policy development in your capital.
Australia	High	Low	Used as a reference (data or analysis) for policy discussion
Spain	High	No Response	I am not best placed to comment on the usage of these products by my Government
Greece	High	Medium	Used as a reference (data or analysis) for policy discussion
Hungary	High	No Response	Not used
Korea	High	High	Has potential for authoritative use in policy development in your capital.
Belgium	Medium	No Response	I am not best placed to comment on the usage of these products by my Government
Canada	Medium	Medium	Has potential for authoritative use in policy development in your capital.
Czech Republic	Medium	No Response	Not used
Japan	Medium	Medium	Other
Netherlands	Medium	Medium	Used as a reference (data or analysis) for policy discussion
Poland	Medium	No Response	I am not best placed to comment on the usage of these products by my Government
Portugal	Medium	Medium	Other
Turkey	Medium	Medium	A basis for policy change
United States	Medium	Medium	Has potential for authoritative use in policy development in your capital.
Estonia	Low	No Response	I am not best placed to comment on the usage of these products by my Government
Israel	Low	No Response	I am not best placed to comment on the usage of these products by my Government
Latvia	Low	Low	Other
Denmark	Very Low	No Response	Not used
Austria	No Response	No Response	I am not best placed to comment on the usage of these products by my Government
Switzerland	No Response	No Response	I am not best placed to comment on the usage of these products by my Government
Germany	No Response	No Response	I am not best placed to comment on the usage of these products by my Government
Finland	No Response	No Response	I am not best placed to comment on the usage of these products by my Government
France	No Response	No Response	I am not best placed to comment on the usage of these products by my Government
United Kingdom	No Response	No Response	I am not best placed to comment on the usage of these products by my Government
Iceland	No Response	No Response	I am not best placed to comment on the usage of these products by my Government
Luxembourg	No Response	No Response	I am not best placed to comment on the usage of these products by my Government
Mexico	No Response	No Response	I am not best placed to comment on the usage of these products by my Government
Norway	No Response	No Response	I am not best placed to comment on the usage of these products by my Government
Sweden	No Response	No Response	I am not best placed to comment on the usage of these products by my Government
Slovenia	No Response	No Response	I am not best placed to comment on the usage of these products by my Government
Slovak Republic	No Response	No Response	I am not best placed to comment on the usage of these products by my Government

Table A A.2. Products included in the end-user survey

3.2.3.3 Monitoring, Evaluation and Statistics of Fisheries Policies (one publication, two reports, one database, one inventory)	
Product Name	**Product Reference**
Fisheries Support Estimate	http://stats.oecd.org/wbos/default.aspx?datasetcode=FISH_FSE
OECD Review of Fisheries: Country Statistics	http://www.oecd-ilibrary.org/agriculture-and-food/oecd-review-of-fisheries-country-statistics_rev_fish_stat
OECD Review of Fisheries: Policies and Summary Statistics 2015	http://www.oecd-ilibrary.org/deliver/fulltext?itemId=/content/book/9789264240223-en&mimeType=freepreview&redirecturl=http://www.keepeek.com/Digital-Asset-Management/oecd/agriculture-and-food/oecd-review-of-fisheries-policies-and-summary-statistics-2015_9789264240223-en&isPreview=true
3.2.3.4 Fisheries & Aquaculture Innovation - Advancing the Green Growth Agenda (one publication, web exchange/clearing house)	
Product Name	**Product Reference**
Fisheries and Aquaculture Innovation Platform	http://www.oecd.org/fisheries-innovation/

Organisation for Economic Co-operation and Development

TAD/FI(2017)13

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TRADE AND AGRICULTURE DIRECTORATE
FISHERIES COMMITTEE

Identifying reform pathways for sustainable fisheries management

An analytical framework

14-16 November 2017
Paris, France

This document, presented for DISCUSSION under item 6 of the 120th Session of the Fisheries Committee (COFI), is an intermediary input in the work mandated under the 2017-18 PWB of the COFI - Expected Output 3.2.3.3.2 *Identifying reform pathways for sustainable fisheries management*.

Ms. Claire Delpeuch, +33.1 45 24 19.99, claire.delpeuch@oecd.org

JT03420802

Note by the secretariat

This document is an intermediary input of the project *Identifying reform pathways for sustainable fisheries management* (mandated under the 2017-18 PWB of the COFI - Expected Output 3.2.3.3.2). It presents the draft analytical framework and the associated policy questionnaire that will underpin the empirical analysis to be undertaken in the coming months. The questionnaire will soon be made available as an Excel file on Delegates' Corner. This corresponds to the outcomes of phases 1 and 2 of the project, as specified in the scoping paper associated with this work [TAD/FI(2017)5].

The document draws on a review of the literature undertaken by Professor Claude Ménard, Université Paris 1 Panthéon-Sorbonne, as well as on the observations and suggestions from the government officials and experts who tested the questionnaire associated to this document (see a list of people interviewed in annex 1). The Secretariat thanks all these people for their kind contribution.

Delegates are invited to share their views on this analytical framework as well as relevant reports, such as internal reports or audits that could enrich the analysis of reform pathways in their countries. Indeed, some of the issues raised in this document are done so on the basis of anecdotal information and the project would benefit from additional sources of information.

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Making Reform Happen for Sustainable Fisheries: An analytical framework

1. Rationale for and objective of the work

A shared diagnosis on the need for reform

1. The need to reform fisheries management to maximise the socio-economic benefits of fishing in the long run while conserving marine ecosystems and fish stocks is increasingly acknowledged (World Bank, 207; FAO, 2016; OECD, 2015a). This need is reflected in the reform agendas adopted over the past decade by a number of countries in the OECD and beyond (OECD, 2015b), as well as in the inclusion of fisheries management objectives in key international fora.

2. The sustainable development goal 14 (SDG 14) adopted as part of the 2030 Agenda for Sustainable Development of the United Nations (UN) in 2015 notably requires countries to regulate their fishing activities effectively on the basis of science, as well as to end overfishing and illegal, unreported and unregulated (IUU) fishing by 2020.[1] It therefore calls for reform of fisheries policies, including, importantly, the prohibition of harmful subsidies. In parallel, current multilateral and plurilateral negotiations regarding fisheries subsidies disciplines in the context of the World Trade Organization (WTO) are aimed at finding agreement regarding which policies should be collectively avoided.[2]

3. Other international commitments have been taken that go in the same direction. The Cancun Declaration adopted by the Ministers and other heads of delegation on the occasion of the UN Biodiversity Conference in December 2016 for example lists a series of actions needed to ensure the sustainability of fisheries. They range from "integrat[ing] the ecosystem approach into fisheries policies, programmes and plans" to "safeguard[ing] livelihoods, income and employment of fishing communities" or "develop[ing] strategies to reduce IUU fishing."

4. Calls for reform are supported by a better understanding of the impact and risks associated with the overexploitation of resources, thanks to improved information on fish stocks and the health of the ecosystem as well as the socio-economic characteristics of fisheries worldwide. Recent estimates suggest that about one third of global marine stocks are biologically overfished, up from about 10% in the mid-1970s (FAO, 2016).[3] In

[1] The Aichi Biodiversity Targets associated to the Convention on Biological Diversity (CBD) of the UN which entered into force in December 1993 already specifically addressed fisheries management. Target 6 notably posits that, by 2020, all fish and invertebrate stocks should be managed and harvested sustainably, legally and applying ecosystem based approaches.

[2] Subsidies that contribute to overcapacity and overfishing are also considered in the CBD of the UN, Aichi Biodiversity Target 3 of which aims to eliminate, phase-out or reform incentives harmful to biodiversity by 2020.

[3] The FAO considers as overfished "stocks fished at biologically unsustainable levels [that] have an abundance lower than the level that can produce the maximum sustainable yield (MSY)" and underfished "the stocks with a biomass considerably above the MSY level [that] have been exposed to relatively low fishing pressure and may have some potential to increase their

addition, estimates of the World Bank (2017) suggest that global fisheries could generate annually an additional 80 billion dollars in value if they were optimally managed (taking 2012 as a base year for the estimation), whereas about 90% of them are currently subject to economic overfishing, that is, levels of fishing that yield sub-optimal economic returns.

5. There is also a general consensus that fisheries are facing and will increasingly face challenges and opportunities that go beyond the sector itself but contribute to the need for and possibility of fisheries management reforms:

- While not yet fully understood, the anticipated impacts of climate change on sea-level rise, ocean temperatures and acidification will likely further complicate the task of fisheries management by exacerbating or generating resource depletion in certain fishing areas, increasing the need for efficient and adaptable management systems (Alison et al., 2009).
- The digital revolution is creating new tools to locate fish, which may increase the scope for over-fishing and over-capacity, while at the same time creating new monitoring and management possibilities, which open grounds for better management of global fisheries (OECD, 2016a).
- Socio-economic tensions affecting fisheries in the context of scarcer resources are also embedded in more general tensions between modernisation, rationalisation and globalisation on the one hand (especially as seafood is among the most traded food goods); and the importance of fisheries and small-scale activities for local communities on the other hand (OECD, 2007a; Hamilton and Duncan, 2000). Such tensions, which are central to debates on agriculture and trade policy as well (OECD, 2017a), raise the issue of the welfare effects of fisheries policies, of their fairness and of the importance of policies that facilitate transitions.

How can governments and stakeholders make progress?

6. Despite broad-based consensus on the need for fisheries reforms, the scope, depth and timing of reform have differed considerably across countries (OECD, 2005). While a series of important reforms have been adopted over the past decade, fisheries policy is believed by some to be particularly difficult to change (Penas Lado, 2016). Political debates around fishing can seem disproportionate in relation to the economic size of the sector (OECD, 2007a), and fisheries reforms are often long and iterative processes (Haraldsson, 2017; OECD, 2017b). The fact that calls for reform have become part of UN objectives agreed to by world leaders on several occasions attests to the difficulty in achieving reform in practice.

7. The objectives of the work planned under item *3.2.3.3.2 Identifying reform pathways for sustainable fisheries management* of the 2017-18 PWB are:

- To provide a comprehensive picture of fisheries reforms in the OECD and beyond over the past decade;
- To use the evidence thus made available to identify the key determinants of the emergence, design, adoption and implementation of fisheries reform (hereafter 'key determinants of fisheries reform');
- To identify steps that governments and stakeholders can take and factors they can mobilise to initiate reform processes and see them through to implementation.

production" (FAO, 2016). In practice, these stocks are identified as, respectively, stocks above 60 percent of the unfished biomass and those under 40 percent (FAO, 2011).

8. This will help respond to the request for advice from OECD member countries on how to move practically towards more sustainable fisheries [TAD/FI(2015)13].

Outcomes of project phases 1 and 2: an analytical framework and an associated questionnaire

9. As specified in the scoping paper [TAD/FI(2017)5], this document develops a draft analytical framework and a questionnaire, in the form of an Excel document that will soon be made available on Delegates' Corner. The draft analytical framework identifies potential key determinants of reform, raises questions as to their weight in different contexts, and formulates a series of hypotheses that need to be investigated empirically to formulate practical recommendations for policy-makers on how they can best engage fisheries reforms. The questionnaire will be used to gather information from a large set of countries to support such empirical analysis.

10. The draft analytical framework has been developed on the basis of a literature review (project phase 1). This review has also guided the construction of the questionnaire, which has been revised on the basis comments and suggestions received from government officials and stakeholders from three OECD member countries (Chile, Korea and Denmark, see annex 1), which kindly accepted to test the questionnaire (project phase 2). The draft analytical framework is currently limited to concepts and illustrations from other sectors. In the final version of the report, it will be augmented with examples taken from past fisheries reforms using the information that will be collected from a large set of countries with the questionnaire.

11. The literature review covers relevant theoretical and empirical literature notably in relation to the political economy of reform as well as the role of institutions in policy-making processes.[4] Notwithstanding the abundant literature on specific reforms in fisheries (and in other natural resources), it is striking how rarely the issue of pathways to reform is addressed per se. However, there are recent signs of an increasing interest in this area (OECD, 2009, 2017a, 2017b; Shirley, 2002; World Bank, 2010), most often treated through the analysis of case-studies. This project seeks to add to this literature by focusing on how the specifics of the fisheries sector shape the way fisheries reform is influenced by key determinants and using empirical information from a large set of countries in a new way.

12. The next phases of the project will focus on collecting cross-country information (the dedicated questionnaire will be sent out in the aftermath of the 120th session of the COFI meeting), and analysing it. A conference will be organized in May 2018 to discuss preliminary findings among key actors of fisheries reforms.[5]

13. It is important to recall that the objective of this project is not to develop a general and easily transferable tool kit based on best practices. Instead, this project rests on the

[4] The review has notably covered previous work of the COFI on fisheries policy reform (OECD, 2011a), including reports on the human dimension of structural adjustment (OECD, 2007a) and subsidy reform (OECD, 2007b). The review also covered relevant work undertaken by the OECD in other policy domains, including a report on the political economy of reform in a comparative perspective (OECD, 2010b), and reports on water governance (OECD, 2011b and 2016) and the political economy of biodiversity policy reform (2017).

[5] The conference *Making Reform Happen for Sustainable Fisheries* will take place at the OECD, in Paris, on 3 May 2018.

idea that important lessons can be learned from past reforms, conditional to their adaptation to specific contexts.

14. The next section of this report presents the basic theory of change that underlies the analysis. This is followed by a review of the factors that potentially matter for fisheries reforms, in which emerge a set of questions and hypothesis that require further examination. The last section presents the questionnaire that will be used to collect such information on a decade of fisheries reforms.

2. Founding assumptions underlying the investigation of fisheries reform pathways' key determinants

Characterising fisheries reform pathways around changes in policy instruments and changes in management practices

15. In this report, we refer to "reform" to describe change of policy instruments and, or, management practices introduced by a Government to more effectively and efficiently reach its objectives. Policy instruments include, *inter alia*, regulatory measures, use or access rights allocation systems as well as taxes and support programmes. Management practices cover rules defining how and by whom policy instruments are chosen, adopted, and implemented, that is, decision-making processes and institutional arrangements.

16. A change in a policy instrument may take the form of the introduction of new restrictions on inputs such as limitations on days-at-sea, closed seasons or prohibitions to use certain gear; a switch from input control-based management to output control-based management; changes to the way access to the resource is granted; restrictions on fishing of certain species, the creation of marine protected areas; or the reallocation of public support to the sector from one type of support to another.

17. Changes of management practices include, for example, the creation of a new institutional body in charge of fisheries management; the introduction of rules on the role of scientific evidence in decision-making; or modifications to co-decision mechanisms that involve different institutions and stakeholders.

18. Most reforms encompass a number of changes that are considered, designed, adopted and implemented as a package. Indeed, the introduction of new policy instruments may require new management practices for their implementation while new management practices may open the room for adoption of new instruments. Reforms can refine existing systems or imply deep structural changes.

19. Evidence suggests that reforms (incremental and structural) tend to overlap at different stages, so the start and end points are not always clear (OECD, 2009; Penas Lado, 2016; OECD, 2017b). This document refers to reform initiation, design, adoption and implementation for defined elements of change (that is changes considered as a package), but it is understood that the implementation phase of one reform may correspond to the initiation phase of another.

20. The term reform pathway is used to refer to the longer-term evolution of policy change, with reforms occurring along the way, sometimes on parallel tracks and overlapping.

Table 2.1. Characterising a decade of fisheries reforms

To characterize a decade of fisheries reforms, Section A of the questionnaire associated to this document asks for information on change in use of the following policy instruments and management practices:

Policy instruments	Management practices
Total Allowable Catch limits (TAC)	Main entity in charge of fisheries management
Harvest control rules	Other responsibilities of the main entity responsible for fisheries
Individual quotas	Is TAC definition legally bound by scientific evidence?
Multi-annual management or recovery plans	How many stocks are subject to quantitative stock assessment?
Eco-system based management	Which stakeholders take part in participatory committees?
Fishing licences	Domains and procedures in which participatory committees intervene
Input restrictions	Appeal procedures for fisheries-related administrative decisions
Other regulations	Entities are in charge of policy implementation
Decommissioning schemes	Entities are in charge of policy monitoring
Special instruments for artisanal fishers	Entities in charge of data collection & reporting

Note: Information on the evolution of support to the fisheries sector will also be considered as an integral part of past reforms in the analysis, using information from the OECD Fisheries Support Estimate database.

Fisheries reform pathways are shaped by the interactions between reform drivers, other contextual factors and attributes of the reform process

21. Reforming public policies usually is a response to a complex mix of challenges that become drivers of reform. These drivers interact with other contextual factors such as socio-economic, institutional and political conditions as well as historical and cultural norms to make certain reform options feasible and acceptable others not. That is, the framing conditions shape the scope of possible reforms.

22. The success of observed reform pathways then depend on how much proposed reform processes fit the framing conditions for reform in particular contexts, and how much governments and stakeholders manage to influence the context and, or, adapt the initial reform plans to make them feasible and acceptable.

23. Reforms, whether incremental or structural, involve some redefinition and redistribution of access to resources (understood as changes to who can practically access the resource, even as a result of technical regulations), and therefore distributional consequences. Hence most reforms are likely to adversely affect some individuals and communities, at least in the short run, through reduced incomes, unemployment, relocation, economic structural change or changes in social capital.

24. This is all the more the case given that (i) the capacity of fisheries reform to improve productivity and incomes is relatively long-term because of the considerable time rebuilding stocks can,take and (ii) fisheries reform often require short-term constraints on production (OECD, 2010a). Distributional impacts with adverse consequences for some, or just their threat or prospect, is one of the major reasons why governments find it difficult to engage in reforms (OECD, 2007a).

25. Reform pathways can thus be complex and long. This can work for the best if progressive implementation and re-definition of reforms help adjust the initial reform

options so that they work on the ground. Long and complex processes however have costs related to their organisation: the administrative costs of undertaking the reform itself, including those associated to consultation and negotiation; and costs related to reform implementation, including for compensation schemes or programmes aiming at facilitating the transition for those who might be disadvantaged (OECD, 2009; 2016a; World Bank, 2010; Ménard, 2016). Reform can also lead to suboptimal solutions, when a chosen path is inadequate to the assigned objectives. Some reforms, for example, tend to add new rules to existing frameworks adopted decades ago rather than replacing them, making difficult and costly both implementation by fishers and control and monitoring by public authorities (Penas-Lado, 2016).

26. This document proposes to base the analysis of past fisheries reform on the following basic assumptions:

- Reform pathways are shaped by interactions between three broad categories of key determinants: reform drivers, other contextual factors and the attributes of the reform process considered.
- Key determinants (and their interactions) operate through three channels:
  - They impact how different stakeholders, and the society as a whole, benefit from a particular reform;
  - They affect the way stakeholders perceive the reform process and their power to influence it;
  - They influence the costs associated with reform.
- Government and stakeholders can shape reform processes in ways that increase the prospects for fruitful reforms by affecting those determinants of reform that are actionable in the short terms.

3. Review of potential factors influencing fisheries reform pathways

27. What follows provides a review of the key determinants of reforms that have been identified in the literature and how they may interact to shape fisheries reform pathways given the specificities of this sector. Where the literature remains inconclusive as to how different factors might combine to influence reform pathways, issues are highlighted that will be further investigated during the next phases of this project, when information on past reforms is analysed.

28. While reviewing potential determinants of fisheries reform, this report importantly attempts to identify ways governments and stakeholders can influence reform pathways to increase the likeliness of fruitful reforms. Those factors that are not directly actionable by policy-makers are of less concern in the perspective of this project, however, they are worth exploring as important control factors for the analysis to come and as background elements that policy-makers need to be conscious of when engaging in reform.

Reforms are most often driven by a combination of challenges

The review starts with challenges which have been reported to play a key role in driving reform by creating a need for the adoption of new policy instruments or management practices.

Challenges directly related to the performance of the fisheries sector are key drivers of reform

29. Depletion of resources, or the risk of depletion, has been found to be a key driver of reform for many sectors of activities. Scarcity of inputs or of financial resources can introduce tensions or even generate crises that push towards adopting new policies or changing existing ones. Reforms in the urban water systems are good illustrations for this (Savedoff and Spiller, 1999; Shirley, 2002; OECD, 2017a).

30. What is more, the risk of depletion provides particularly strong incentives to reform for sectors where supply, productivity and profitability are directly and importantly affected by the status of resources (OECD, 2011a; OECD, 2016b; FAO, 2016a; World Bank-FAO, 2009; 2017). In extreme situations, fisheries collapse can cause major socio-economic hardships to communities, regions and even countries as a whole depending on the importance of fishing and prospects for alternative activities.

31. Evidence shows that climate change is already affecting fisheries and marine ecosystems (Alison et al., 2009) with impacts ranging from certain fish species growing more slowly (or quickly) to stocks moving to different areas far from where they were traditionally fished. For particular fisheries, climate change can thus have consequences similar to depletion of resources. Likely, the effect of climate change on fisheries is likely to become an increasingly important driver of reform.

32. Under-performance of the sector, and notably over-fishing, over-capacity and decreasing productivity are all warning signs, which come before resource depletion, but can already act as strong drivers for reform. A number of exogenous factors can contribute to decreasing productivity and under-performance of the sector and potentially contribute to driving reform. An unfavourable macro-economic context can affect the costs of fishing, seafood prices and ultimately the profitability of fishing activities. International trade disruptions arising from regional or bilateral trade agreements that lead to greater integration of seafood markets and a more competitive environment (Shirley, 2002; OECD, 2009); the imposition of temporary trade bans; new non-tariff barriers to trade; or market evolutions in other parts of the world can play a similar role, especially because seafood is one of the most globally traded food product.

33. One key endogenous factor behind fisheries performance is fisheries policies. Reforms are therefore also found to be driven by policy impact and perception of such impact by stakeholders (OECD, 2009; Deacon, 2010; World Bank, 2010). Dissatisfaction regarding existing rules because of perceived inefficiency, inadequacy of objectives, or disagreement with instruments chosen for allocating access to resources can fuel the desire of reform, especially when fisheries face the risk of depletion or decreasing productivity and profitability. Such appreciation of existing policies in part depends on administrative capacity for monitoring and surveillance ex-ante. In a context of inefficient enforcement, perception of existing policies is likely to be negative for lack of results or even counterproductive effects.

Box 3.1. How scientific evidence can be mobilised to increase knowledge of the challenges that motivate reform

Scientific evidence and analysis has a key role to play in motivating reform by describing the status of fisheries and the resources on which they rely and estimating the cost of different sources of under-performance, such as over-fishing and over-capacity.

An important characteristic of fisheries science, however, is that assessments are not always entirely conclusive. This is due to interdependences among species and between fisheries, the complexity of the bio-ecological system in which they develop and the difficulty and cost of collecting information. The absence of definitive scientific evidence in fisheries is particularly challenging for policy-makers as it weakens the strength of the evidence that can support the need for reform while calling for more preventive reforms before robust evidence is produced, especially in countries where the capacity to produce such evidence is scarce.

In this context, the mechanisms of scientific evidence production and sharing are a major factor for motivating reform in a credible way. For example it has been pointed out that the involvement of respected research institutions in providing information to the general public can de-politicize debates on the status of resources or the sector and facilitate the adoption and implementation of major structural reforms (OECD, 2009, on reforms in pensions programs and labour markets). Consideration of alternative sources of evidence and data, including fishers' knowledge, may also improve understanding of the status of fisheries (especially in countries where scientific capacity is scarce) as well as make assessment of fisheries status more acceptable and legitimate to actors and stakeholders (Fischer et al., 2015).

When analysing past fisheries reform experiences, attention will be given to scientific evidence production and sharing notably to investigate how uncertainty regarding stock status can be turned into a rationale for use of the precautionary principle rather than acting as a reason for delaying reform.

Reforms can also be driven by factors exogeneous to sector performance

34. Reforms are sometimes also triggered by legal obligations or commitments. Such constraints pushing for reform can intervene at the domestic level, for example when management systems were conceived for a defined period of time, with a legal commitment to be reviewed and, or, reformed at a given moment. They can also derive from the adoption of new international commitments in fisheries management, such as the adoption of treaties, agreements, or global standards of practice such as the FAO Agreement on Port State Measures to Prevent, Deter and Eliminate Illegal, Unreported and Unregulated Fishing, notably when their adoption is accompanied by financial support for implementation (FAO, 2015). Regional Fisheries Management Organisations (RFMOs) are another major arena where such commitments are taken, with direct implications on countries' domestic management of fisheries, potentially giving rise to reforms when existing systems cannot accommodate the engagements taken. Whether governments engage in international commitments when they are already ready to adopt and implement their provisions domestically, in the perspective of encouraging their adoption more widely, or whether such agreements really act as drivers of reform in some

countries is an interesting issue that will be investigated by consulting policy-makers with regards to past reforms in future phases of this project.

35. Macro-economic crisis can also act as a driver of reform, especially in countries where fisheries are important at a national scale by creating pressure on national budgets and more limited access to financial markets, which can motivate changes in budgetary support programmes. The financial crisis of 2008 amplified these trends among OECD countries (OECD, 2010b).

36. Finally, although a lot of attention has been paid to reforms initiated as a response to crisis (Drazen, 2000; Alesina et al., 2006; OECD, 2017b), it has been rightly noticed that many reforms, particularly incremental ones, develop in conditions of normal politics (OECD, 2009). In such a context, examples show that those in charge at a given moment also can act as drivers of reform for example because of the particular leverage they enjoy among decision-makers, because of the authority they have to convince stakeholders or because of their personal interest in particular aspects of policies (OECD, 2007b).

Table 3.1. Investigating reform drivers of past fisheries reforms

Sections B of the questionnaire associated to this document asks for information on the pertinence and degree of importance of the following potential drivers in determining particular reform episodes

Reform drivers
Was the reform initiated in the context of challenges to fisheries performance?
Was the reform initiated by a commitment to do so?
Was the reform initiated following expression of dissatisfaction with previous fisheries instruments or management practices?
Was the reform initiated in a context of insufficient policy enforcement?
Was adequate data available to policy makers and the public to motivate the need for reform?

Note: Information on the macro-economic context will also be considered in the analysis, using information from existing OECD databases.

Specificities of the socio-economic, political, institutional, historical and cultural context can combine to make reform feasible and acceptable

37. The above-mentioned drivers, and combinations of them, are likely to play very different roles, in terms of initiating a reform, depending on the contexts in which they occur. The fact that countries are finding it difficult to commit themselves to reform in different international fora, despite a situation of known over-fishing, over-capacity and decreasing productivity at a global scale indeed demonstrates the fact that, often, such signs are not sufficient to drive reform alone.

38. In what follows, we therefore review the contextual factors that may counter the potential impulse for reform created by the drivers mentioned above. Most of these factors are also influential in determining further steps of the reform process – design, implementation and monitoring; we address this where relevant.

Why, how and to whom fisheries matter and how this can spur resistance to reform

39. Adverse consequences for some stakeholders are inherent to any reform modifying access to resources or mechanisms of support, as exposed above (OECD, 2007a and 2007b). Stakeholders are most likely to fear such impacts and resist reform (i) when history of similar reforms, in the past, or in other countries, led to important adjustment

and distributional effects (OECD, 2009) and (ii) when their resilience to adjustment is weak.

40. This is a key concern in the fisheries sector because of relatively lower job mobility due to lack of employment alternatives in many coastal regions, specialised skills, and lower willingness for geographical mobility. Because of particular working conditions, ranging from seasonality to payment systems based on share of catch, fishermen sometimes may also not be entitled to sufficient unemployment or other social benefits when needed (OECD, 2007a). This implies knock-on effects on the flexibility and resilience of fishery-dependent communities. In this perspective, a favourable macro-economic context, and especially low levels of unemployment, can improve the feasibility of reform and facilitate implementation by improving the resilience of communities.

41. Reasons for stakeholders to oppose a proposed reform however also include less predictable concerns related to norms and perceptions. For example, when policies have been in place for a long time, they tend to be perceived as rights by their beneficiaries even if they do not deliver in practice the expected impact, especially support policies. Such perceptions have been identified as a persistent inhibitor of reform (OECD, 2007b).

42. Distrust towards the institutions and people initiating reform can also feed resistance to reform (OECD, 2009; OECD, 2017b). Distrust may for example be rooted in past practices of policy-makers such as allocation of access to fishing resources perceived as unfair.

43. Given the small and decreasing part of the Gross Domestic Product and employment for which fisheries account in most OECD countries, rarely exceeding 1 % of GDP and employment, one may expect that reform processes should not be seriously challenged by opposition from sector stakeholders.[6] However, many reasons explain the fact that fishers and the fishing industry can act as a strong group of interest with significant power to resist or influence reform (OECD, 2007a).

44. According to the theory of collective action (Olson, 1965), the very fact that the direct beneficiaries of public policies in fisheries often only represent a small fraction of the population means that their capacity to organise to defend their interests is likely to be greater than that of larger groups, relative to the economic importance of the sector.[7] Fishers are also often described as belonging to geographically concentrated and tightly knitted communities that internally value solidarity and fairness, reinforcing their capacity to lobby when it comes to driving or hindering reforms (OECD, 2007a). Empirical evidence of fishers particular cohesion (compared for example to users of water or land) has however not been found. This question will be investigated indirectly with the questionnaire.

[6] In a few countries, notably outside OECD, fisheries play a more important role at the national level, in terms of GDP, employment, and as an employer of last resort as well as an uneasily substitutable source of key nutrients, particularly to the poorest communities (Kawarakuza and Béné, 2011). In such contexts, the dynamics related to collective action and the lobbying capacity of the fisheries sector to influence reform pathways may be different.

[7] Because of the relatively small size of the sector, the aggregate cost associated to fisheries policies tends to be smaller than for other sectors, which means it might not be of key concern to tax-payers, hence potentially creating little public concern for delayed reforms even if they are needed.

45. In addition, the political importance of fisheries also has to be considered from a territorial perspective as, at the local level, fishing and downstream activities can acts as the engine of the economy and a major, difficultly substitutable, source of incomes. There is also a cultural dimension to the perception of fishing activities and of the status and role of fishermen not only by fishing communities but also by the general public, which may reinforce the political importance of fisheries issues and increase the sensitivity of fisheries reforms. Fishermen are often seen as devoting hard work to a demanding and risky activity that involves facing natural elements and that is essential for the wellbeing of everyone, as well as constitutive of valued regional and local identities (OECD, 2007a).

46. The socio-economic and cultural importance of fisheries at local levels translates into key political concerns for policy-makers with an electoral mandate from fishing regions. It has been seen, for example, that parliamentarians from such regions sometimes do not follow the directives of their political parties when it comes to designing and adopting fisheries reforms, but rather act in line with views expressed by their fisheries stakeholders. Political coalitions on fisheries-related matters can be quite different from the coalitions observed on other matters.

47. Conversely, it has been shown that clear political mandates obtained either through elections during which clear programs are debated regarding coming reforms, or the building of a trans-partisan coalition that produces a reform mandate, which applies to successive governments despite changes in the governing majority, have played an important role in facilitating reform adoption (OECD, 2009). The latter option is particularly interesting as it helps reconcile the political cycle, which is usually short-term with the time horizons of fisheries reforms, which can only be sustainable with relatively long term objectives and take time to deliver both in terms of the status of resources and returns of fishing.

48. A more general lesson emerging from the political economy literature is that the most favourable time for reform in the political cycles seems to be during a relatively short window opening – called conjuncture – which happens right after the election of a new political coalition or right after a socio-economic crisis (Keeler, 1993).

49. What is more, the political weight of fishers' positions is challenged, notably in the most developed countries, by public concern for environmental issues reflected in media coverage and lobbying activities on issues such as the preservation of biodiversity and marine ecosystems. There is even concern, among sector stakeholders, that such lobbying has increased beyond legitimate (Giron, 2012). No evidence has been found of the evolution of public concern for ocean protection and sustainable fishing, and related lobbying activities, that is comparable across countries. This question will be investigated more in future steps of this project.

50. Fishing activities tend to be clustered and specialised, with heterogeneity in the scale of operation, the inputs used and the stocks targeted. Stakeholders in fisheries, including fishermen themselves, therefore do not form a perfectly homogenous entity and are likely to be affected differently by reform. This could create room for reform, especially if different sub-groups of stakeholders have the means of expressing their opinions. However, the literature rarely mentions diversity of opinions among sector stakeholders in the public debate around reforms. Rather, it has been noted that, because large-scale industrial operations might be less sympathetic to the public than small artisanal fishers, lobbying groups representing fishers at large tend to "use the artisanal fishery as the face of their communications strategy even when most benefits accrue to

larger operations" (OECD, 2013). This issue will be further investigated through the questionnaire.

Table 3.2. Investigating how contextual forces mattered in shaping stakeholders attitudes in past fisheries reforms

Section B of the questionnaire associated to this document asks for information on the pertinence and degree of importance of the following factors in determining particular reform episodes

Socio-economic, political, cultural and historical context	Role of stakeholders
How important are fisheries at regional/local levels in fishing areas?	Was opposition to the reform process voiced by stakeholders?
How important are fisheries in employment at national scale?	Did direct lobbying from the fisheries sector have an impact on the reform process? (e.g. inclusion of exemptions, amendments or compensation)
How important is fish in national diets?	Were politicians from fishing regions particularly implied in reform design or active in debates around adoption of the reform?
Are some fish stocks important to domestic fisheries overfished?	Were fisheries issues debated between political parties?
Is the fisheries sector in good economic health?	Were public demands for environmental improvements related to fisheries expressed?
Are fisheries strongly concentrated?	Did different groups of fishers or representatives of the downstream industry voice different positions on the reform process?
Are fisheries is seen as an important cultural matter at national or local level?	
Did the Government have a clear mandate for reform?	
Was the reform introduced during a particular political window of opportunity?	

Note: For most of the issues investigated in relation to the socio-economic, cultural and historical context, information will be taken from existing databases.

The pivotal role of the institutional context in internalising potential resistance to reform

51. Another level at which resistance to reform can emerge is across governing institutions when decision-making processes are fragmented. This is of particular concern in the field of fisheries policies. Because of the mobility of the resource to be managed and legal provisions attributing responsibility over different areas of the seas to different authorities, responsibilities for fisheries management tend to be spread, and overlap, between central administrations, regional or local administrations, international cooperation bodies, as well as institutions managing particular species or fishing areas (OECD, 2011a; OECD, 2016a; Ménard, 2016). With increasing recognition of the need to embed fisheries policies into the general context of the marine economy in order to address the combined impacts of different activities on the ecosystem (Jay, 2017; Blæsbjerg et al., 2009), responsibilities for fisheries management are also increasingly shared by institutions responsible for different policy domains (OECD, 2015b).

52. Such fragmentation may induce competition among authorities and across institutional layers, raising the multiple principals' problem, which hampers the capacity to adopt needed policies on time (Weigel and Monbrison, 2013). In the case of fisheries, conflicts have notably been reported between authorities in charge of environmental protection and those in charge of the sector development. Fragmentation can also result in complex allocation of decision rights among layers of public authorities in charge and

jurisdictions that overlap leading to problems of coordination and implementation along the reform process (Ménard, 2016).[8]

53. The existence of participatory bodies can strongly change the influence of different stakeholders, including different institutions, and the degree to which opposition to reform may interfere in the reform process (and thus the impact of the contextual factors mentioned in the above section). These participatory bodies are those through which representatives of different institutions concerned with fisheries and related policy domains, groups of stakeholders, NGOs, or scientific institutions can intervene in decision-making.

54. The existence of participatory bodies can reduce dissent and the need for future amendments by contributing to shaping reforms more in accordance with institutions and stakeholders' concerns and objectives. Acceptability of reform can notably be obtained thanks to the inclusion of specific programs to facilitate transition for those who will be disadvantaged by the reform, compensation, selective exemptions, or more general amendments to the content of reform (OECD, 2013). Participatory bodies may also contribute to a better understanding of the rationale of the reform among different parties, sometimes leading to changes in positions on the reforms proposed (OECD, 2017b).

55. They can also create commitment from different parties, hence making the reform more sustainable by reducing the need for control, conflict solving and dispute resolution along the process. This is particularly important for parties having responsibilities in reform implementation, such as local institutions or private stakeholders in countries in which control and monitoring is partly delegated to the industry.

56. Participatory bodies can have roles that range from pure advice to recommendations that imply effective constraints. The advice of scientific institutions, for example, has increasingly become constraining for policy-makers. The higher the degree of constraint, that is the higher the degree of co-decision, the more pressing the need for policy-makers to build a coalition (or even, some degree of consensus) around the need for reform and the options chosen to undertake it, and the greater the advantages above-mentioned.

57. Higher degrees of co-decision however also mean greater costs related to the negotiation of an agreement and greater risk of delaying reform or derailing it from its initial goals (OECD, 2009) with opportunity costs related to exemptions and amendments as well as budgetary costs for compensation and policies facilitating the transition.[9]

58. All these costs are also dependent on the variety of institutions and, or, stakeholders represented in participatory bodies. This raises important questions regarding

[8] On the other hand, competition among institutions may also limit the risk of governmental monopolies (Laffont and Martimort, 1999; Estache and Martimort, 2001) and decentralized decision-making may result in reforms better adapted to local conditions (Weingast et al., 2005). Under which conditions fragmentation can be beneficial to reform processes in fine remains debatable (Laffont, 2005; Estache and Martimort, 2001). At present, there are only few empirical studies assessing the impact of these different contexts on reform processes, something that can be done only through comparative analysis

[9] In this perspective, a favourable fiscal situation may increase the scope for reform by offering more budgetary scope to provide compensation and transition arrangements for those who might be disadvantaged by a reform (Tompson, 2009).

the degree of inclusiveness and the composition of participatory bodies. On the one hand they need to be inclusive enough to avoid issues arising from certain stakeholders being left behind and reforms designed without adequate consideration of impacts on these stakeholders. On the other hand, over-representation of some particular groups can lead to appropriation of reforms. It can be argued that representing the interests of the society as a whole, including through attention for particular groups, is precisely the role of policy-makers and politicians in a democracy, which would signal the need to limit the role of participatory bodies that are not elected, or based on representatives elected by small sub-groups. The issue of composition of participatory bodies has been found to be sensitive with tensions sometimes resulting from perceived imbalances or questions regarding the legitimacy of non-sectoral stakeholders' (notably NGOs) intervention in decision-making (Penal-Lado).

59. The policy mandate of the main institution in charge of fisheries management may also impact the influence of different stakeholders and other institutions in the reform process. For example, reform processes may be differently impacted by different stakeholders when initiated by institutions with responsibilities for fisheries management exclusively, or by institutions with responsibilities for broader issues such as environmental protection, marine affairs, or economic affairs. This could be the case both because of different political mandates, but also because of different cultures among the people in charge, for example resulting from whether they have mainly a biological, economic or general administrative background. Along the same lines, the reform process may be impacted differently by stakeholders depending on whether policy-makers from fishing regions are represented in decision-making instances related to fisheries policies such as Parliamentary commissions for fisheries for example.

60. The literature is however inconclusive regarding the different trade-offs policy-makers face when setting up consultation and co-decision mechanisms and the impact of responsibilities attribution under different policy domains. When looking at past fisheries reforms at later stages of this project, best practices will be looked for in terms of composition and degree of co-decision of participatory bodies in the perspective of facilitating reform. Particular attention will be given to mechanisms that facilitate dialogue between representatives of fishers and the industry, in their diversity, and representatives of organisations with an interest in the preservation of biodiversity, resources and eco-systems.

Table 3.3. Investigating the role of the institutional context in past fisheries reforms

Section B of the questionnaire associated to this document asks for information on the pertinence and degree of importance of the following factors in determining particular reform episodes

Institutional context	Role of institutions and participatory Committees
How fragmented in the decision-making process for fisheries management?	Did different institutions in charge of different aspects of fisheries management express disagreement over the reform process?
Which stakeholders and institutions were represented in participatory committees?	Did the fragmentation of the decision-making process lead to problems of coordination along the reform process?
Did participatory Committees intervene in the reform process on an advisory basis or with some degree on constraint in their recommendations?	Did participatory Committees prove useful in lowering opposition to the reform?
At which steps of the reform process did participatory Committees intervene?	Did advice or recommendations from the participatory Committees have an impact on the reform process? (e.g. inclusion of exemptions, amendments or compensation)
What policy domain did the main entity in charge of fisheries management cover?	

Note: Information on the institutional context will be sourced from Section A of the questionnaire.

An adequate reform design process to maximise the potential for fruitful reform

61. The final set of determinants investigated in this section relates to aspects of reform design.

62. One of the main challenges raised in the literature with regards to reform design relates to the variety of objectives that a reform should target and the choice of policy instruments that may sustain such a variety of objectives. This variety can be wide in the field of fisheries reforms, with goals ranging from solving problems directly related to fisheries performance (such as unemployment in the sector, or declining productivity or incomes) to broader issues (like preserving biodiversity or improving of a country's fiscal situation). As noted by Thompson (World Bank, 2010), in many recent fisheries reforms, there has been a propensity to adopt multiple goals overlapping distributional and conservation issues.

63. On the one hand, comprehensive reforms targeting a diversity of objectives, can lead to balanced policy packages, when policy instruments combine to offset the adverse impacts of each other for those disadvantaged by certain aspects of reform. For example, it has been argued that reforms targeting the reduction of over-capacity and the individualisation of fishing rights allowed compensating those leaving the sector following adjustment. Designing reforms around packages of instruments and offsetting measures may thus reduce opposition to reform (OECD, 2007b) and increase transparency.

64. On the other hand, a key problem with reform embracing multiple objectives is however that they may not always be compatible in the short terms. For example, policy instruments supporting a certain fleet size and associated employment opportunities, for example, are unlikely to, at the same time, contribute to rebuilding overfished resources. A possible way out of such dilemmas may be to envision a broader set of policy instruments in the framework of the reform, for example, by considering instruments that could create employment outside the fisheries sector.

65. Another important dimension of reform design relates to transparency and communication around reform objectives. Reforms of public utilities as well as of major public policies regarding pensions or labour markets have suggested the importance of

clarity of objectives in building a stable coalition to support a reform, in making the reform credible, and in creating favourable conditions to its successful implementation (Ostrom, 1990; Cowan and Vickers, 1998; Savedoff and Spiller, 1999; Shirley, 2002; OECD, 2009). In addition, numerous illustrations are provided by reforms in other sectors of how important the narrative is to support reforms (Ménard and Shirley, 2008; OECD, 2009; OECD, 2017b). It is worth noting that stakeholders play an important role as communicators, diffusing their interpretation of the reform objectives to a more general public.

66. A second key design dimension which has been found to support reform is ex-ante reform impact estimation, which has become a legal requirement for many policy-makers (for example, the European Commission introduced an internal system of integrated impact assessment for its major policy proposals in May 2002, CEC, 2002). Impact assessment is important both to fine-tune reform design and to communicate to stakeholders about expected impacts. Unexpected or unanticipated impacts of past reforms have indeed had serious effects on reform pathways, creating the need for and the desire of further reforms, sometimes with radically different objectives and instruments (OECD, 2015a; Hutniczak, 2014).

67. Impact estimation is however a difficult task that needs to intervene at the right time in the reform process (OECD, 2007b). It requires collecting information and assessing possible costs and benefits of reform by using measures such as gains (or loss) in productivity, impact on employment, and size of eventual support on the basis of projections and hypotheses as to how key sector variables might react to envisioned changes. It has also been shown, through the example of successful and failed structural reforms, that estimating the costs of inaction, that is the consequences of not redefining objectives and of maintaining the status quo, and communicating about these costs, is an important element to attract support for the objectives assigned to a reform (OECD, 2009: 49 sq.).

68. Finally, it has been shown that the existence of mechanisms of appeal to process challenges to rules adopted and to solve disputes is another important attribute of reform processes that can reinforce the voice of stakeholders in the implementation of reform and reduce resistance. As emphasized by Ménard and Shirley (2008) adequate mechanisms of appeal strengthen the credibility of rules adopted, particularly when they impose constraints on actors, by allowing some flexibility in the interpretation of rules while simultaneously checking politically motivated interventions that would distort or circumvent rules adopted in reform in favour of specific subgroups. This positive rule presumes that the mechanisms of appeals (typically courts or administrative jurisdiction) are themselves credible. In many countries courts have been found play a key role in framing reforms through their interpretation of the law or the constitution, for example, in relation to the allocation of fishing rights.

Table 3.4. Investigating the impact of reform process attributes on past fisheries reforms

Section B of the questionnaire associated to this document asks for information on the pertinence and degree of importance of the following factors in determining particular reform episodes

Reform process attributes
What were the main objectives of the reform?
Was communication undertaken on these objectives and the options chosen to achieve them?
Was estimation of impact undertaken ex-ante and by whom?
Were mechanisms of appeal used in the reform process?
Was a diagnostic of the sector and resources undertaken, and by whom*

Note: * The last question refers to the issue of scientific advice raised in Box 2.1

4. A questionnaire to gather information and opinions

69. To empirically investigate key determinants of reform pathways and try to answer some of the questions that were found to remain open in the literature in the above review (see summary in Table 4.1 below), a triangulation strategy (Rothbauer, 2008) has been proposed in the scoping paper that initiated this project [TAD/FI(2017)5]. Such a strategy, combining an extensive exploration of the literature relevant for the research question at stake, discussions with experts and actors, and use of a questionnaire to collect information from a broad-based and diverse sample of countries (comprising all OECD member countries as well as partner economies cooperating regularly with the COFI) aims to minimise the biases that each of these methodological approaches face by cross-checking through different sources. What follows briefly describes the construction of the questionnaire, which will soon be made available, in a dedicated Excel file, on Delegates' Corner.

70. Information on fisheries policy instruments and management practices was already provided by many OECD member countries in 2005 in the form of country chapters as part of a project on fisheries policy reform (OECD, 2005). This information has been restructured to characterize policy instruments and management practices in use in 2005 along the lines proposed in table 2.1.

71. The first section of the questionnaire, pre-filled with the information on 2005 policies, invites responding countries to provide similar information for 2016. The scope of fisheries reforms undertaken in just over a decade is thus defined by the changes identified between 2005 and 2016. Information on changes to support and specific taxation will also be considered as an integral part of reform, using information from the OECD FSE database.

72. The second section of the questionnaire aims to collect information on the potential determinants of reform processes that took place between 2005 and 2016. It needs to be filled in relation to at least one particular reform in each responding country. The information collected relates to the three categories of determinants considered in this paper:

- reform drivers, along the lines of Tables 3.1;
- contextual factors and their impact on the role stakeholders and institutions, along the lines of Tables 3.2 and 3.3;
- the attributes of the reform process(es) for which each country elected to respond in this section of the questionnaire; along the lines of Table 3.4.

73. For each determinant, the questionnaire seeks to find information on relevance and relative importance. To account for the relevance, the OECD Secretariat has collected information from existing data and information sources (and will use some of the relevant information from section A of the questionnaire). Such data includes, for examples, information on the macro-economic context a (from OECD.stat), information on the institutional context (from section A of the questionnaire) or information on the political context (from the World Bank Development Indicators database). This information will be automatically filled in the questionnaire to reduce the information collection burden for respondents.

74. The relevance of some reform drivers and contextual factors is however particularly difficult to measure in a comparable way across countries – for example, the importance of fisheries for local communities, or the relevance of cultural and historical dimensions in the political weight of fisher representatives. For such factors, the opinion of respondents is asked.

75. The opinion of respondents is also asked for in relation with the perceived relative importance of potential key determinants in determining reform pathways using a standard scale of 5 degrees of agreement.

76. Early results of the statistical analysis of the information gathered will be further discussed during a conference bringing together key actors of fisheries reforms.

Table 4.1. Summary of questions remaining open in the literature and which will be investigated in future phases of the project

Do fishers belong to particularly cohesive communities, making them a relatively more powerful lobbying group (compared for example to users of water, or agricultural producers)?
How can best practices in terms of scientific evidence production and sharing help turn uncertainty regarding stock status into a rationale for use of the precautionary principle rather than a reason for delaying reform
Do governments engage in international commitments when they are ready to adopt and implement their provisions domestically or do such agreements act as drivers of reform in some countries?
Did different groups of fishers or representatives of the downstream industry voice different positions in reform processes and can this be encouraged in the perspective of sustaining reforms?
Have public concern for ocean protection and sustainable fishing, and related lobbying activities, increased in recent years?

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Annex 1: list of people who tested the draft questionnaire and were interviewed to discuss it

- Mr. Andrés Couve, Advisor on International Affairs, SONAPESCA F.G., Chile
- Mr. Mogens Schou, Denmark, Partner, AquaMind, Denmark
- Mr. Max Nielsen, Associate Professor, Department of Food and Resource Economics Science Faculty University of Copenhagen, Denmark
- Mr. Tae Hoon Lim, Chief of the International Cooperation Division, Ministry of Oceans and Fisheries, Korea
- Ms. Myeonghwa Jung, Director of Department of International Fisheries Research at Korea Maritime Institute, Korea

Organisation for Economic Co-operation and Development

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18 October 2017

TRADE AND AGRICULTURE DIRECTORATE
FISHERIES COMMITTEE

Orientation of the 2019-20 Programme of Work and Budget of the Fisheries Committee

14-16 November 2017
Paris, France

This document is presented for discussion under Item 5 of the agenda.

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ORIENTATION OF THE 2019-20 PROGRAMME OF WORK AND BUDGET OF THE FISHERIES COMMITTEE

Introduction

1. This note highlights broad policy issues of possible interest that could be addressed in the 2019-20 Programme of Work and Budget (PWB) of the Fisheries Committee (hereafter "Committee"). The aim is to encourage a substantive discussion in the Committee of the medium-term analytical and policy priorities of member and partner countries.

2. This note reflects the Strategic Orientations of the Secretary General, the Committee's Mandate and Strategy, the Committee's experience to date in implementing its 2017-18 PWB, including its Global Relations Strategy, its on-going contribution to the World Trade Organization (WTO) negotiations, including on-going discussions in the run-up to the WTO Ministerial Conference (MC11) in Argentina and the discussions on United Nations Sustainable Development Goal (UNSDG) No. 14. It gives due consideration to the challenges and opportunities for governments to institute policies and practices, both nationally and internationally, that will lead to an improved economic, social and environmental contribution of the fisheries sector toward sustainable growth, employment and global food security.

3. Following an initial discussion in the November 2017 meeting based on this note highlighting major elements of possible future work, a revised note will be provided by the Secretariat before the end of 2017, soliciting written comments from the Committee. These comments will be brought together to inform a preliminary draft 2019-20 PWB that will be provided in advance of the May 2018 Committee meeting. At the May 2018 Committee meeting, delegations will be invited to discuss and to agree upon their priorities for the coming period, by consensus. Further details on the proposed approach to achieve such consensus are outlined in Annex 1.

General Considerations

4. The work of the Committee is one component of the OECD's strategic objective of "framing priorities for the next fifty years", drawing lessons learned from national and international efforts to address the decline of world's fisheries resources, and the rapid pace of growth of aquaculture, and recognising the role that the OECD's evidence-based analytical work can play in advancing these efforts. Against this backdrop, the Committee is expected to identify best policies and practices and to help promote their implementation. The Committee is mandated to achieve this outcome through:

- Helping countries identify needs, options and implementation advice for improved domestic fisheries and aquaculture policy – through effective monitoring, analysis and discussion of policy gaps, options and trade-offs, and lessons from best practice;
- Improving the analytical foundations of international fisheries and aquaculture policy debate and agenda-setting by providing policy analysis and advice,

especially on emerging issues, especially with a view to help develop consensus on sound management practices; and

- Contributing to OECD wide policy analysis and advice, as appropriate.

5. For greater impact of its work, the Committee could consider implementing a communications plan that targets both government officials and selected public audiences, so as to improve the visibility and potential impact of the Committee's work. Working more closely with national governments on communication and the dissemination of policy findings, within member and partner countries and on a regional level, should remain a priority. *What concrete actions could the Secretariat, and delegations, undertake in this respect?*

6. The UNSDGs discussions have helped to direct and maintain international attention on the issue of conserving and sustainably using ocean resources. Additionally, in September 2016, a subset of WTO members, with the aim of creating an enforceable instrument to address overfishing, overcapacity and illegal fishing, launched a plurilateral negotiation on fisheries subsidies. The plurilateral sets out to prohibit harmful fisheries subsidies, including those that contribute to overfishing and overcapacity or that are linked to illegal fishing, and to strengthen the reporting and transparency obligations relating to fisheries subsidies. This initiative rejuvenated the WTO multilateral discussions on fisheries subsidies. To contribute to these important initiatives, by providing data and other information that will allow governments to have more informed discussions, the Committee launched a project to expand its Fisheries Support Estimate (FSE) database. This includes improving information on fisheries support policies across an ever-increasing number of countries and developing analytical tools to understand their effects. *Should the Committee contribute further to these UNSDG and WTO discussions and possible outcomes? Are there any other international, regional, or domestic initiatives toward which the Committee can contribute?*

7. Consistent with its Global Relations Strategy, the Committee, over the past biennium, has increased its co-operation with countries from Southeast Asia, notably Indonesia. In addition, Thailand regularly takes part in the Review of Fisheries and in data-collection exercises. While the Committee has not been able to engage Malaysia and the Philippines, their data have been secured for the FSE database through a consultant. The Committee is working now with Viet Nam, an important aquaculture producer and processor of fish products. In 2017-18, the OECD will conduct a Review of Fisheries and Aquaculture Policies in Viet Nam that could lead to including Viet Nam in all the regular data-collection and policy analysis exercises conducted by the Committee, and serve as a basis for regular participation of Viet Nam in future editions of the Review of Fisheries. *Should we continue to expand our global policy coverage by enhancing our relationships with target countries including to collect information for our FSE database? Should these efforts be supplemented by even greater collaboration with other international and regional organisations?*

8. Currently, the Committee is not engaged in any joint projects with other Directorates or international organisations; however, past co-operative efforts related to IUU fishing have been fruitful. A workshop on IUU fishing was organised, in 2016, together with the OECD Committee for Tax Policy and Administration (CTP), the OECD Task Force on Tax Crimes and Other Crimes (TFTC), the Food and Agriculture Organization (FAO) and others. *Should the Committee more actively engage with other Committees and International Organisations? Is so, in what areas?*

9. As regards working methods, the Committee will continue to position itself upstream of negotiations and other national and international initiatives related to fisheries. The impact and relevance of Committee work is being promoted through active engagement in international processes, as previously mentioned. We are actively seeking opportunities for timely policy dialogues with the aim of increasing the exchange of ideas across governmental, industry, academic and civil-society groups. *What are the ways and means we should introduce to facilitate frank, open, and forward-looking policy discussions with relevant stakeholders – whether inside or outside the Committee meeting setting?*

10. The sections that follow attempt to explore further the appropriate orientation of the Committee's future work within two broad output areas: promoting sustainable fisheries and promoting sustainable aquaculture. The Committee is invited to focus on policy areas of highest relevance and potential impact at national, regional and global levels.

Promoting Sustainable Fisheries

11. The Committee's overall aim in this area is to contribute to national and international efforts to achieve environmentally sound fisheries that support resilient communities and provide quality food.

- Any agreement at the WTO would leave many implementation details to be worked out. The UNSDG target 14.6 objectives calls for elimination of harmful subsidies by 2020, and target 14.6.1 calls for progress by countries in the degree of implementation of international instruments aiming to combat illegal, unreported and unregulated fishing. *How can the Committee contribute to the monitoring and possible implementation requirements of the next phase of these global initiatives?*
- What aspects of fisheries management could be analysed to make a meaningful contribution toward ongoing government efforts, both national and international, in this area?
    - In recent years, COFI has focused on issues related to resources management and economic maximisation. Fisheries policies are often also designed with social considerations in mind. Are implications on employment and social sustainability of different management options an area the COFI would like to revisit?
    - Should we expand our monitoring system and data collection to include more aspects of fisheries management?
- New technologies have created both challenges and opportunities for the fisheries sector. For example, these technologies have facilitated the catching of more fish with fewer resources and they have enabled more effective monitoring of fishing activities. Are there any aspects surrounding these new technologies, including Information Communication Technology (ICT), on which the Committee could undertake work?
- Are there specific trade issues in the context of capture fisheries (e.g., tariffs, subsidies, non-tariff barriers, sanitary and phyto-sanitary regulations, antidumping

and countervailing duties, technical barriers to trade, rules of origin, or responsible conduct and due diligence along the supply chain) that the Committee should explore?

Promoting Sustainable Aquaculture

12. The rapid growth of modern aquaculture has revealed its potential as an important source of fish products for consumers but it has also brought new challenges related to environmental sustainability and socio-economic implications and its full impact is still being learned. Fish products are already among the most traded food products, and the pattern of growth in aquaculture is only increasing its global nature. How consumers react to the increasing industrialisation and globalisation of fish production will shape future markets.

- What areas of work should the Committee undertake to address the social, economic and environmental-sustainability concerns regarding aquaculture?
- Are there specific trade issues in the context of aquaculture (e.g., tariffs, subsidies, non-tariff barriers, sanitary and phytosanitary regulations, antidumping and countervailing duties, technical barriers to trade, rules of origin, or issues related to responsible business conduct along the supply chain) that the Committee should explore?
- Technological developments have contributed to the major expansion of aquaculture, leading to more efficient and economical operations. Should the Committee analyse how these technological developments, including innovations in ICT, are affecting aquaculture as well as regulations affecting these technologies?
- Should the Committee further build on its work on aquaculture licensing?

Conclusion

13. This note is not intended to be either prescriptive or exhaustive; it seeks to launch a frank and open discussion among delegations with respect to their medium-term policy priorities and how the Committee might contribute to addressing them. Initial views from delegations are invited on the issues of most interest to policy makers, and on the ways the Committee could respond most effectively to them, including but not limited to those outlined above.

14. At this stage, future budgets are of course unknown; as a practical matter this question is not yet relevant for an initial discussion of priorities. It is expected that resource planning assumptions for the period 2019-20 will be clarified over the coming months, in advance of the May 2018 meeting of the Committee.

15. ***The Committee is invited to focus its efforts on those policy areas of highest relevance and potential impact at national, regional and global levels.***

ANNEX 1. PROPOSAL FOR DEVELOPING THE FISHERIES COMMITTEE'S PWB 2019-20

16. As was the case for previous PWBs, the preliminary draft 2019-20 PWB will be developed in light of initial Committee discussions in November 2017, a subsequent revised version of this note drafted by the Secretariat in late 2017, and written comments provided by delegations in response to the revised note in early 2018.

17. This preliminary draft will be provided to the Committee in advance of its May 2018 meeting, and will be structured in three parts. Section I will include only proposals for "core" *Intermediate Outputs* – these activities would be intended to represent the common, though not necessarily universal, policy interests of member governments as expressed during earlier discussions of the Committee's work priorities. Section II will present an additional list of "choice" *Intermediate Outputs* - these activities would be intended to represent the full range of additional policy interests expressed by member countries but for which there has not yet been widespread support.

18. This split presentation will aim to build upon the common interests of all member countries, while still leaving scope for final decision making by the Committee at its meeting in May 2018. To facilitate Committee's consideration of future work priorities, Section III will provide a brief narrative description of both core and choice *Intermediate Outputs*. In addition, both core and choice Intermediate Outputs will be categorized within a limited number of *Expected Output Results* which would be designed so as to represent an aggregation of activities that contribute to a common policy area of interest.

19. It is expected that the proposed set of core Intermediate Outputs would require 70-80% of available resources, and that the choice Intermediate Outputs might require a further 40-50% of available resources. The sum total of core and choice Intermediate Outputs might then be equivalent to about 120% of resources available. In deciding on its DRAFT PWB for 2019-20, the Committee will need to identify the subset of Intermediate Outputs that corresponds to approximately 100% of the budget available.

20. To facilitate discussion and decision-making at the May2018 meeting of the Committee, the following procedure is proposed.

i. The Secretariat would briefly present an overview of the preliminary draft PWB and address any questions of clarification.

ii. Delegates would be invited to discuss and agree upon the core Intermediate Outputs, as proposed. To the extent that this is not possible, outstanding issues would be noted by the Secretariat and an alternative proposal would be presented later in the meeting.

iii. Delegates would then be invited to discuss the choice Intermediate Outputs and to agree upon the subset of these outputs that are of the highest common interest to members and which are achievable with the available resources. To the extent that some policy priorities of member countries are not effectively addressed in the preliminary draft PWB, Delegates will be invited to propose additional specific projects to be considered. Following an initial round of discussion, the Secretariat would propose a revised set of

Intermediate Outputs, commensurate with resources and feasible in terms of staff available, for further consideration by the Committee.

iv. Additional rounds of discussions and proposals would aim to narrow any differences and to reach a consensus satisfactory to all.

v. Once the Intermediate Outputs have been agreed by the Committee, Delegates would be invited to rank the Expected Output Results. This ranking is required to enable any future, and as yet unknown, budget reductions to be made in light of Committee priorities; any such modifications not made directly by Council would be made in consultation with Bureau members. This ranking would also serve as a basis for the Committee to re-allocate resources during 2019-20, should it wish to do so in response to any new and unforeseen priority that might emerge.

vi. The final PWB proposal, in the required template format, would be available to delegations prior to its furtherance to the Secretary General, in preparation for a decision by Council on the OECD's overall 2019-20 PWB.

vii. Intermediate Outputs that are considered by the Committee but which are not included in its PWB proposal could be future candidates for voluntary contributions.

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TRADE AND AGRICULTURE DIRECTORATE
FISHERIES COMMITTEE

Combatting Illegal, Unreported and Unregulated Fishing

Progress report

14-15 November 2017
Paris, France

This document is an intermediary input in the work mandated under the 2017-18 PWB of the COFI - Expected Output 3.2.3.3.1 Combatting Illegal, Unreported or Unregulated Fishing. It is presented for DISCUSSION.

This document takes stock of the information and data received by October 6, 2017, and presents how this information and data will be analysed.

Delegates are kindly invited to provide feedback and complete their data and information submissions as soon as possible.

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JT03420801

Note by the Secretariat

This document is an intermediary input in the project on *Combatting Illegal, Unreported or Unregulated Fishing* (mandated under Expected Output 3.2.3.3.1 of the 2017-18 PWB of the COFI).

At the 119th session of the COFI meeting, a literature review was presented, which identified the relevant policies and management practices that countries can adopt to fight illegal, unreported and unregulated (IUU) fishing [TAD/FI(2017)2]. Since then, the second phase of the project has consisted of launching an information collection process with a broad range of countries on the extent to which these recognized best policies and practices have been implemented.

This document takes stock of the information and data received by October 6, 2017, and presents how this information and data will be analysed once the data and information collection is complete.

Delegates are kindly invited to provide comments on the methodology and the proposed template for presenting the results as well as to complete their data and information submissions as soon as possible

A final report will be presented to the COFI in 2018. The final report will aim to inform countries of where they stand, with respect to the implementation of recognized best policies and practices to fight against IUU; and help international organisations focus their work and support in this domain. This should support the follow-up and review mechanisms for the implementation of goal 14.4 of the United Nations 2030 Agenda for Sustainable Development.

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Combatting Illegal, Unreported and Unregulated Fishing: Progress report

Where do we stand on tracking the implementation of recognized best policies and practices against IUU fishing?

1. Since the release of the report *Why fish piracy persists* (OECD, 2005), research and the sharing of knowledge and experiences between practitioners, policy makers and scientists have provided a more detailed and practical understanding of the drivers behind illegal, unreported and unregulated (IUU) fishing operations. Concurrently, IUU fishing has come to the forefront of the international political agenda, notably with the adoption of Sustainable Development Goals (SDG), especially Section 14.4 which sets the target of ending IUU fishing by 2020[1]. Fishing nations, in particular OECD member countries, have been taking actions to address the issue of IUU fishing by adopting new regulations and improving their monitoring and enforcement capacity. Despite the efforts deployed to combat IUU fishing and increased public and political attention to this issue, much remains to be done.

2. The OECD project on Combatting Illegal, Unreported and Unregulated Fishing aims to provide policy makers with a better understanding of the remaining policy gaps and regulatory loopholes related to IUU fishing. Moreover, it intends to help countries identify measures that could bridge these gaps and suggest how to strengthen implementation of existing tools for better compliance with regulations and reporting requirements. Although there is no "one size fits all" solution to IUU fishing, greater transparency on procedures and legal systems existing across countries as well as raising awareness on tools at hand may help governments adopt cost-effective approaches to fight IUU fishing, including through collaborative efforts. This project considers a decade of progress in understanding and combatting IUU fishing and aims to characterise relevant policies (regulations and instruments) and management practices (decision-making processes and institutional arrangements) in countries. It also provides a comparative description of their degree of implementation.

Project phase 1- the inventory of recognized best policies and practices – completed

3. The first phase of the project consisted of inventorying the policies and management practices recognized as having potential to reduce IUU fishing, found in the recommendations and legal instruments of internationally-recognised institutions working on this issue (hereafter "recognized best policies and practices"). The rationale underlying for carrying out this exercise is explained in the document [TAD/FI(2017)2], which was presented at the 119th COFI. The summary tables included in Annex 1 detail the sources on which each question of the questionnaire was based.

[1] The fight against IUU fishing can also contribute to attaining the SDG 1 'No poverty' and SDG 2 'No hunger' and SDG16 'Peace, justice and strong institutions' by 2020.

4. The recognized best policies and practices in the fight against IUU fishing can be grouped along four main policy areas:

- Regulations related to state responsibilities, and notably those related to flag state, coastal state and port state measures that directly target IUU fishing.
- Policies addressing economic incentives to engage in IUU fishing, and notably economic measures to fight against IUU fishing. These include market related measures, institutional and regulatory mechanisms to uncover and address economic incentives to engage in IUU fishing such as tax fraud, money laundering and subsidies to IUU fishing activities.
- Policy instruments related to international cooperation initiatives and notably mechanisms for information sharing and coordination among different authorities, such as inter-agency cooperation at national and international level.
- Enforcement mechanisms, and notably monitoring, control and surveillance systems as well as sanctions schemes [TAD/FI(2017)2].

Project phase 2 – information collection –waiting for completion

5. The second phase of the project involved the collection of information from a broad range of countries, to investigate the extent to which these recognized best policies and practices have been implemented. To this end, a questionnaire was developed by the OECD Secretariat through which countries were invited to report the extent to which they have adopted and implemented them. Questions were classified in the categories and section specified in **Error! Reference source not found.**.

Table 1. Categories and sections classification

Category	Section
STATE	FLAG STATE RESPONSIBILITIES
	COASTAL STATE RESPONSIBILITIES
	PORT STATE RESPONSIBILITIES
ECONOMIC MEASURES	MARKET STATE RESPONSIBILITIES
	ECONOMIC MEASURES TACKLING IUU FISHING
COOPERATION	INTERAGENCY CO-OPERATION AT NATIONAL LEVEL
	INTERNATIONAL CO-OPERATION
ENFORCEMENT	MONITORING, CONTROL AND SURVEILLANCE
	INFRINGEMENTS, SANCTIONS

6. The questionnaire was sent to Member Countries as well as other economies participating in the project in May 2017. As of 6 October 2017, 13 countries had fully completed the questionnaire among which 10 OECD Members and 3 non-OECD countries or observers.[2] In addition, 14 countries have sent data and information that still need to be revised and complemented.

[2] Australia, Denmark, Estonia, Germany, Japan, Latvia, Netherlands, Norway, Turkey, United States, Colombia, Lebanon and Chinese Taipei.

Project phase 3 – collected information - analysis is on-going

7. The third phase of the project consists of analysing the information collected. It is still in process because the information collection has not been completed.

8. To track the extent to which recognized best policies and management practices have been implemented, answers to all questions in the questionnaire have been scored following the method presented in annex 1. For each country, the aggregated scores represent the degree of implementation across all recognized best policies and practices in a given policy category or section. Similarly, progress in the implementation of particular policies and practices can be tracked across countries, by comparing aggregated scores at the global level for a particular question3.

9. To see how the current situation represents progress over the situation a decade ago, where possible, the information collected with the questionnaire will be compared with information collected by the OECD in 2005, in the context of the report Why fish piracy persists (OECD, 2005). The questionnaire used in 2017 was formatted so as to make the information collected as comparable as possible with the information collected in 2005. The comparison will however be restricted to the two policy areas, which were covered in 2005: state responsibilities and economic measures. In 2005, the collection of information covered 14 countries, all OECD members 4.

Project phase 4 – further investigation on best practices for cooperation –on-going

10. As mentioned in the scoping paper, to complement information provided with the questionnaire, the study will further analyse cooperation mechanisms both in the context of international cooperation against IUU fishing (mostly through RFMOs) and in the context of new national inter-agency cooperation developed in a few countries.

[3] The detailed scoring and aggregation methodology is presented in Annex 1.

[4] Australia, Austria, Belgium, Canada, Germany, Iceland, Japan, Korea, Mexico, Netherlands, New Zealand, Norway, Turkey and United States.

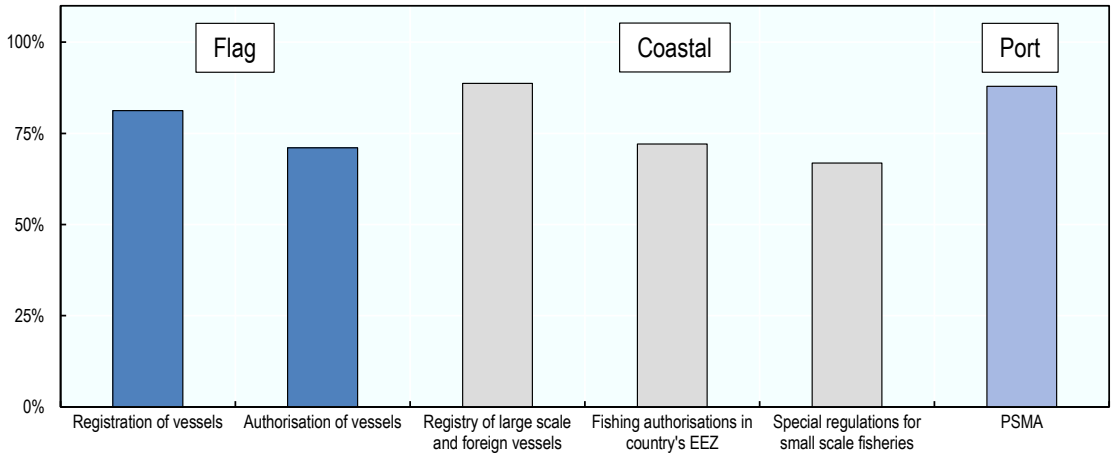
Illustration of expected results for phase 3 – analysis of information on the implementation of recognized best policies and practices

11. The three figures that follow illustrate the type of analysis we will be conducting once the information collection is complete, by category of recognized best policies and practices.

- Figure 1 illustrates how agregated results on the degree of implementation of identified best policies and practices will appear by subsection weighted by country production volumes taking the example of state responsibilities.
- Figure 2. Degree of implementation of identified best policies and practices Error! Reference source not found. across countries taking the example of vessel authorisations schemes
- Figure 3 illustrates how the comparison of the situation between 2005 and 2017 will appear in order to help track progress.

Figure 1. Degree of implementation of identified best policies and practices related to state responsibilities

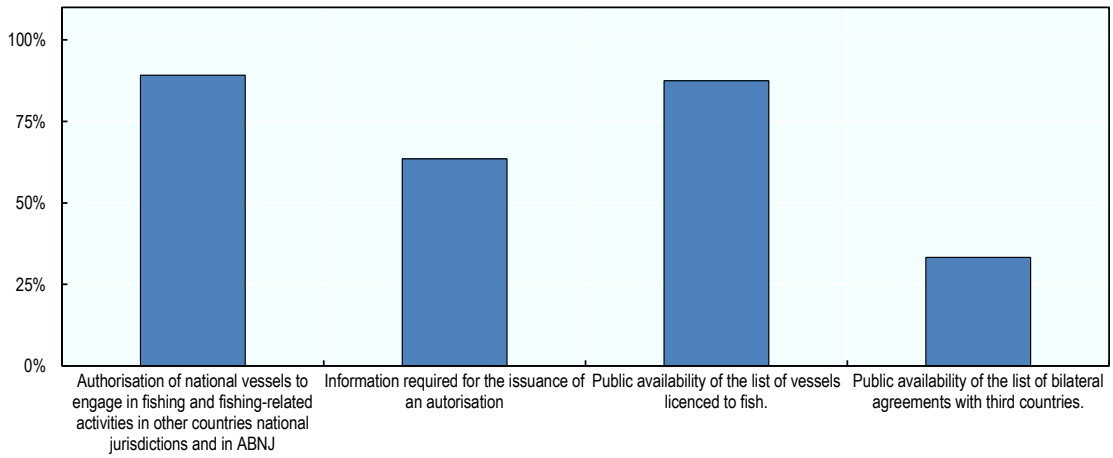
Illustration of possible infographic based on a very restricted sample of countries.



Note: Country scores weighted using production volume (FAO, 2017).
Source: OECD data collection on IUU fishing 2017.

Figure 2. Degree of implementation of identified best policies and practices related to the particular issue "authorisation of vessels"

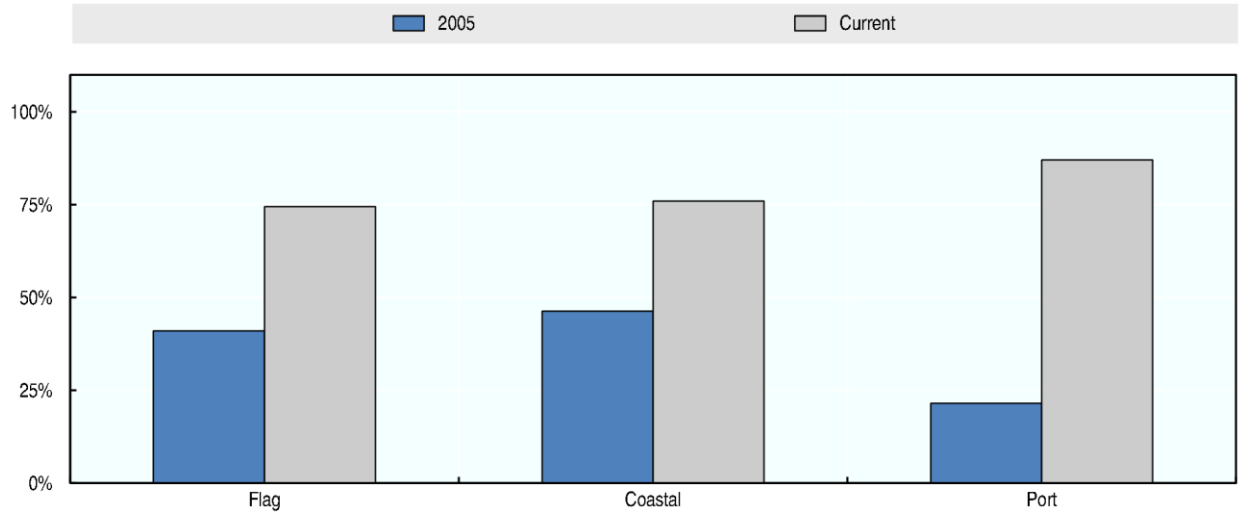
Illustration of possible infographic based on a very restricted sample of countries.



Note: Country scores weighted using production volume (FAO, 2017).
Source: OECD data collection on IUU fishing 2017.

Figure 3. Progress in implementation of identified best policies and practices related to state responsibilities since 2005

Illustration of possible infographic based on a very restricted sample of countries



Note: Country scores weighted using production volume (FAO, 2017).
Source: OECD data collection on IUU fishing 2005 and 2017.

Approach taken for phase 4 – collection and analysis of additional information related to cooperation

12. The analysis of international cooperation mechanisms against IUU fishing will be undertaken with a focus on RFMOs. The planned analysis proposes to cover the main RFMOs that have established legally binding measures for member parties. This includes eleven RFMOs:

- The Commission for the Conservation of Southern Bluefin Tuna (CCSBT),
- The General Fisheries Commission for the Mediterranean (GFCM),
- The Inter-American Tropical Tuna Commission (IATTC),
- The International Commission for the Conservation of Atlantic Tunas (ICCAT)
- The Northwest Atlantic Fisheries Organization (NAFO)
- The North East Atlantic Fisheries Commission (NEAFC)
- The South East Atlantic Fisheries Organisation (SEAFO)
- The Southern Indian Ocean Fisheries Agreement (SIOFA)
- The South Pacific Regional Fisheries Management Organisation (SPRFMO)
- The Indian Ocean Tuna Commission (IOTC)
- The Commission for the Conservation of Antarctic Marine Living Resources (CCAMLR)
- The Western and Central Pacific Fisheries Commission (WCPFC).

13. Based on information collected by the Secretariat, additional information from countries and consultations with RFMOs, the study will review processes and enforcement measures that directly target IUU fishing. This will focus on two key dimensions of RFMO activities in relation to IUU fishing: (i) measures related to the listing of IUU vessels in the framework of RFMOs' general decision-making process, and (ii) the processes related to compliance with and enforcement of international obligations including open access information on monitoring, surveillance and control (MSC). These two dimensions do not exhaustively cover all measures and processes of RFMOs to combat IUU fishing. However, they form the core basis of the fight against IUU fishing at RFMO level (UNGA, 2012[3]), (UNGA, 2015[4]), (Ceo et al., 2012[5]), (Koehler, 2016[6])).

14. Concerning, cooperation at national level, inter-agency cooperation (such as Task Force against IUU fishing) will be further analysed. A range of organisational models exist for structuring the respective share of responsibilities across agencies to fight IUU fishing. Each organisational model has distinct features which need to be taken into account when developing strategies for inter-agency cooperation to ensure that the full benefits of cooperation are achieved. A selection of existing mechanisms will be reviewed along 5 lines; (i) the establishment of an inter-agency body, (ii) the institutional set-up, (iii) key procedures for inter-institutional cooperation, (iv) difficulties in the practicalities of cooperation, and (v) benefits observed. Information on the Task Force against IUU fishing built by Norway in 2007 has been received and will be compared with other inter-agency models. This analysis is not meant to be an evaluation for the effectiveness of the cooperation in a given country, but simply represents and overview of the mechanisms in place.

Annex 1. Methodology: scoring and aggregation

Step 1: basic scoring

15. The first step of the empirical analysis consisted in scoring answers to each question of the questionnaire. This was done by assigning a percentage score based on the degree of implementation of each of the recognized best policies and practices considered:

- Responses were scored at 100% when countries declared that a given measure was fully implemented.
- Responses were scored at 50% when countries reported limits to their degree of implementation either because
  - i. Recognized best practices and policies were not fully implemented for all fisheries, or because
  - ii. Recognized best practices and policies were adopted and partially implemented, that is, all enforcement mechanisms were not in place.
- Responses were scored at 20%, when countries reported adoption of recognized best policies and practices but no implementation.
- No adoption led to a score of 0% when recognized best practices or policies were not in place.

When a question could not be applicable to the current situation of a given country, no score was applied.

Step 2: specific scoring

16. A specific scoring method was used for multiple-choice questions[5].

17. The scored degree of implementation depends on the number of standard modalities met for each question. When all standard modalities listed requested for a measure are implemented by a given country the response is scored at 100%. When not all these modalities are implemented the response is scored with a percentage representing the proportion of implemented modalities over the total number of possible modalities.

[5] Questions with checkboxes format within the questionnaire.

Table 2. Multiple-choice questions

Section	Sub-section	Question
Flag	Registration of vessels	Registration requirements for national fishing vessels in other countries national jurisdictions and in ABNJ
Flag	Authorisation of vessels	Authorisation of national vessels to engage in fishing and fishing-related activities in other countries national jurisdictions and in ABNJ
Flag	Authorisation of vessels	Information required for the issuance of an authorisation
Coastal	Registry of large scale and foreign vessels	Requirements regarding the registering of large scale and foreign fishing vessels in the EEZ
Coastal	Fishing authorisations in country's EEZ	Information required for the issuance of an authorisation (large scale and foreign vessels)
Coastal	Fishing authorisations in country's EEZ	Authorisation or licencing of foreign vessels required when operating in the EEZ
Coastal	Special regulations for small scale fisheries	Special requirements regarding small scale fisheries
Cooperation	Inter-agency cooperation at national level	Authorities involved
MSC	Monitoring, control and surveillance tools and infrastructure	Control regime over vessels in the EEZ and ABNJ
Infringements, sanctions	Sanctions	Scope of sanctions scheme

- Concerning the“ updating of national registry”, the best practices is considered to be an updating the national registry at least twice a year (or in real time) as this allows a better monitoring of vessels especially in the event of flag change. Such situation would thus be scored at 100% of implementation. Countries updating the national registry once a year (this generally corresponds to a fishing season) would then be considered as having a reasonable degree of implementation (50%). When the national registry is not updated at least once a year, the practice is not considered well implemented (0%).
- For the “public availability of the list of bilateral agreements with third parties”, the recognised best practice correspond to situations with the highest level of transparency possible, i.e. with public available information on financial transfer to a third country (degree of implementation of 100%). If the only the list of bilateral agreements with third parties is publicly available, the management practice is considered reasonable (degree of implementation of 50%). If bilateral agreements are ongoing but no information is publicly available at all, the process is considered opaque (degree of implementation of 0%).
- Recognised best practices in raising awareness among stakeholders to contribute to the fight against IUU fishing correspond to awareness raising activities that are implemented or developed with both the industry and the civil society (100%). If only the industry or the civil society was involved in such initiatives, the process is considered partially implemented (50%). If there are no such initiatives, the practice is not considered implemented (0%)

- Other questions in the table have a straightforward scoring system asking if recognised best policies and practices are in place (yes (100%) or no (0%)). In some instance, practices can be partially implemented (see basic scoring) or in process to be implemented corresponding to a score of 50%.

Table 3. Specific scoring systems

FLAG STATE RESPONSIBILITIES	Registration of vessels	Updating of the national registry	In real time or at least twice a year	100%
			If once a year	50%
			Less than once a year	0%
		Public availability of the registry	Yes	100%
			No	0%
	Authorisations	Public availability of the list of vessels licenced to fish.	Yes	100%
			No	0%
		Public availability of the list of bilateral agreements with third countries.	Yes available with transparent reporting of fees to access water	100%
			yes without transparent financial contribution	50%
			No	0%
COASTAL STATE RESPONSIBILITIES	Fishing authorisations/ licensing in your EEZ	Public availability of the list of third country vessels licenced to fish in your waters.	Yes	100%
			No	0%
COASTAL STATE RESPONSIBILITIES	Fishing authorisations/ licensing in your EEZ	Limits on issuance of licences.	Yes	100%
			No	0%
MARKET STATE RESPONSIBILITIES	Traceability measures	Standardisation of certification and documentation requirements	Yes (for certain species of high value)	100%
			In process or partly implemented	50%
			No	0%
		Use of trade information to target IUU fishing trade	Yes	100%
			No	0%
		Awareness-raising among stakeholders to deter IUU trade	Broad inclusion (including the industry and the civil society)	100%
			Only inclusion of the industry or only the civil society	50%
			No inclusion	0%
MONITORING, CONTROL and SURVEILLANCE	Monitoring, control and surveillance tools and infrastructure	Fisheries monitoring centre and near real-time controls of fishing vessels in the EEZ and ABNJ	Yes	100%
			Partially implemented	50%
			No	0%
		Publication of positive (authorised) and negative (IUU) vessel lists	Yes	100%
			Partially implemented	50%
			No	0%
INFRINGEMENTS, SANCTIONS	Sanctions	IUU fishing sanctions within the national legal framework.	Yes	100%
			Partially implemented	50%
			No	0%
		Sanctions on nationals in third country flag vessel or in ABNJ	Yes	100%
			Partially implemented	50%
			No	0%

Step 3 aggregation

18. Once scoring is done for each question, an aggregation is undertaken at two levels: across sections and sub-sections of questions and across countries (see table 1 and annex 2 for the list of categories, sections and sub-sections used to classify all measures).

19. The aggregation across section is done by giving equal weight to each question within a sub-section (except in the context of multiple-choice measures[6] as mentioned above). Section scores are then aggregated at the category level using equal weights for each section. A percentage score of 100% for a category would then mean that all the recognized best policies and practices in that category are fully implemented.

20. The aggregation across responding countries is done by weighing country scores by their respective production volumes.

[6] For multiple-choice measures, we considered that the implementation of all standard modalities associated with the measure represented more than the implementation of another type of measure that does not have so many standard implementation modalities. Therefore, the weight assigned to these multiple-choice measures has been set at twice the weight of other measure.

Organisation for Economic Co-operation and Development

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17 October 2017

TRADE AND AGRICULTURE DIRECTORATE
FISHERIES COMMITTEE

Informing Fisheries-Related Trade Negotiations

Initial model development

14-16 November 2017

This document is presented for DISCUSSION as item 9 at the 120th meeting of the Committee for Fisheries.

The work reported here was planned under item 3.2.3.4.5 Informing fisheries-related trade negotiations of the 2017-18 PWB [TAD/FI(2016)11]. It builds upon the project's initial output, Support to fisheries: Levels and impacts (OECD 2017) by describing a modelling approach for assessing the relative effects of alternative fisheries policy categories.

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JT03420884

Note by the Secretariat

This report is under item 3.2.3.4.5 *Informing fisheries-related trade negotiations* of the 2017-18 PWB [TAD/FI(2016)11]. It builds upon the project's initial output, *Support to fisheries: Levels and impacts* (OECD 2017) by describing a modelling approach for assessing the relative effects of alternative fisheries policy categories. The Fisheries Policy Evaluation Model described here is still in its early stages. How the model develops from its current form (i.e. single species, single fishery, single 'fish' output') will determine the types of policy investigations of which it will be capable.

Advice is sought from delegates on what their priorities are for the next steps of model development. For example, how much focus should be dedicated to elaborating management measures vs. stock dynamics vs. increasing the number of stocks vs. adding production details? An expert meeting is foreseen in 2018 to review the model and the data and to gain advice on next steps.

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1. A model of policy effects to support international objectives

1. This work was planned under item 3.2.3.4.5 Informing fisheries-related trade negotiations of the 2017-18 PWB [TAD/FI(2016)11]. This PWB item has the principal objective of developing the OECD Fisheries Support Estimate (FSE) data sufficiently to provide improved understanding of fisheries policies and their effects.

2. This work is motivated by international concern regarding overcapacity, overfishing and IUU fishing, which is being addressed in the UN Sustainable Development Goal (SDG) 14.6 and in the negotiations currently underway in the World Trade Organization (WTO) on fisheries subsidies.

3. The first phase of this work was designed to provide a more authoritative and useful source of information on fisheries policies in the form of the Fisheries Support Estimate (FSE) database. The second phase of the work is to investigate the effects of those fisheries policies on overcapacity, overfishing, and other areas of policy interest . The model described in this report is proposed as a method to carry out that investigation. This report describes in detail the approach taken in its development and the reasons behind that approach.

4. The OECD has a history of using its expertise in evaluating support programmes to assist trade negotiations, proving that a credible and consensus-based voice based on a sound analytical framework can be a positive addition to the process. The development of the Producer Support Estimate for the agriculture sector and its use in the Uruguay Round of negotiations is a case in point (Cahill, C., Legg, 1990[1]). The work of the Fisheries Committee could play a similar role in the WTO negotiations and any subsequent related initiatives. In this way the FSE can serve both as a tool to increase the transparency of fisheries policies and to analyse their effects.

5. This project is intended to support trade discussions by investigating the characteristics of policies that would determine, *inter alia*, their impact on overcapacity and overfishing. By improving our understanding of how polices impact factors such as sustainability, fishing effort and the livelihoods of fishers, policy makers will be better placed to make and evaluate policy proposals in the context of trade negotiations. This will also increase the practical enforceability of trade agreements that touch upon fisheries and aid measuring progress towards the United Nations Sustainable Development Goal (SDG) 14.6 as it concerns fishing subsidies.

6. This PWB item is being delivered in phases. The earlier work was reported in *Support to fisheries: Levels and impacts* (OECD, 2017[2]) where the FSE database and some preliminary analysis are described. This report follows that work by describing a modelling approach for assessing the relative effects of alternative fisheries policy categories. It allows the relative impact of experimental changes in different policy categories to be assessed on four primary dimensions; capacity, harvest, stock size and benefit to fishers. The first two dimensions directly address the question “which forms of support contribute to overfishing and overcapacity?” The third is an important measure of sustainability, and the fourth helps clarify the private benefits derived from policies and the objectives that motivate them.

2. The Fisheries Policy Evaluation Model is based on a successful method for assessing the impacts of support

7. In the initial stages, a decision had to be made on whether to use and adapt an existing model or to develop a new one. Previous work by the Secretariat on modelling the impact of fuel tax concessions [TAD/FI(2012)1] gave COFI the opportunity to inventory and assess many existing fisheries models. However, the conclusion at that time was that there was no existing fisheries model that could be adapted at low cost for the purpose of that work because the costs for training, modification and licensing would be too large.

8. By contrast, the OECD Policy Evaluation Model (PEM) has been in development and use for almost twenty years and has the benefits of in-house expertise and a similar purpose. This makes it a good choice as a cost-effective basis for model development under this PWB item. This report describes the development of a "Fisheries PEM" version of the model.

9. The PEM has been used extensively for assessing the effects of support in the agricultural sector, as classified in the Producer Support Estimate (PSE) (OECD, 2009[3]; Martini, 2011[4]; OECD, 2001[5]) and has previously been successfully adapted to evaluate agricultural policies in developing countries (DEVPEM) (Brooks et al., 2011[6]). The PEM partial equilibrium model of the farm sector is itself based upon the model elaborated in Gardner (1987[7]). This approach was first developed by Hicks to study issues in labour economics, and the model has since been widely applied in general economic policy analysis. Its application for the PEM follows most closely applications found in (Atwood and Helmers, 1998[8]; Gunter, Jeong and White, 1996[9]; Hertel, 1989[10]).

10. The main design insight of this modelling approach, and one of the features that makes it particularly applicable in the context of analysing fisheries support, is the way that different policy types can be uniquely represented in the structure of the model. The FSE classification system is designed to identify the economically-relevant distinctive features of policies. The model builds upon this by having specific components designed to match the different categories in the FSE. The Fisheries PEM thereby conserves these economically-relevant distinctions and provides a closer connection between measurement of support (the FSE) and quantitative analysis of the effects and distribution of such support.

11. The inclusion of explicit input markets in the model is the most important part of this connection between FSE categories and model components. Input markets are where the things used by fishers are bought and sold[1]. This allows, for example, to distinguish the differences between policies based on fixed (e.g. vessels) and variable (e.g. crew, fuel,

[1] Inputs into production are defined as any material that is purchased and used as part of the production process. This is in practical terms the same as factors of production, which is a term often used in this kind of modelling. Factors are sometime reserved to mean the primary building-blocks of economic output—capital, labour and land. For this reason, the term input is used here but without an intention to make a conceptual distinction between factors and the terms can be seen as interchangeable.

gear) inputs used by fishers. The markets for these different kinds of inputs are quite different, so policies that target each will have different effects.

12. The PEM input-market-based supply structure provides the basic structure for the Fisheries PEM and the categorisation used in the FSE informs the choice of which input markets to represent. Policies in the Fisheries PEM are consequently defined in terms of FSE categories and not individual programmes.

13. Fishery harvest is determined through the inclusion of a bio-economic component to the model, essentially a logistic population growth function. Starting with an intentionally simple structure of a single stock exploited by a single homogeneous fishery, early versions of the model will assess the implications of FSE categories in a steady-state outcome.

14. This simple representation allows the model to be specified with a small number of parameters and synthetic data to create a stylized model that does not represent an actual fishery but serves to identify some important analytical features. The aim is that this will ultimately provide important information for policy makers by identifying the important aspects not only policy design, but also which aspect of fishers' behaviour and incentives shape the effects of policies.

15. This version of the model is intended to establish the feasibility of the approach and build on the first principles analysis undertaken in the initial stage of this project (OECD, 2017[2]). It forms the basis for a more complex model that is intended to be built up over time, allowing features such as multiple countries, species, or management measures such as total allowable catch (TAC) to be added later and accounted for when calculating indicators such as fishing effort, stock size or capacity.

2.1. The model is based on the concept of introducing a shock to a system in equilibrium

16. The model requires three main sets of assumptions to be made, these relate to: (1) the basic structure of supply and demand response, (2) the underlying data and the elasticities and (3) the market of primary incidence of support measures. Economic theory and results of previous studies have been used to guide choices about the structure of the model, the data, and the economic parameters to use.

17. The type of analysis undertaken using this modelling framework has become known more generally as 'equilibrium displacement modelling' (Salhofer and Sinabell, 1999[11]; Cahill, 1997[12]; Piggott, 1992[13]), where commodity supply is usually represented in terms of an aggregate production function and the associated input demand and input supply functions. In the case of the Fishery PEM the aggregate production function is replaced by a supply function that results from fishing effort entering a yield function to determine the harvest level. Adding a demand function allows for an equilibrium price and harvest level to be endogenously determined. Most of the functional relationships in the model are represented as equations that are log-linear in elasticities and percentage changes in quantities and prices.

18. In doing policy analysis, specification of supply and demand in input and product markets are combined with the equilibrium condition that supply must equal demand to simultaneously clear all markets. This system of equations is calibrated to replicate a given set of prices and quantities in a particular base year. A small change in the value of some exogenous policy parameter, such as an input subsidy or income support, can then

be introduced and the model used to calculate a new set of equilibrium values for all endogenous prices and quantities. This procedure is termed a 'policy experiment' or 'policy simulation experiment'.

19. Policy simulation experiments usually involve relatively small changes in policy variables because of concern about whether model estimates of policy effects will be valid for large changes (e.g. complete elimination of government support programs for fisheries). The concern arises first because demand and supply relationships in the model are derived from theory applied to evaluation of small 'marginal' changes in variables and, secondly, because all the supply and demand relations in the model are approximated with constant elasticity linear equations. The validity of the constant elasticity assumption can be brought into question when applying the model to evaluation of large changes in policy. Further, there is no way of knowing whether the elasticities of supply and demand appropriate for evaluating larger changes should be higher or lower than those appropriate for evaluating small changes. Concerns about the robustness of simulation results to large changes are not unique to the modelling approach used here. They apply equally to any and all policy analyses based on numerical simulations of economic models, partial and general equilibrium alike.

20. What, in practical terms, is 'too large' a change in a policy variable? Gardner (pp.132), cautions, "Strictly speaking, the [experimental] changes imposed must be infinitesimal, since the equations are generated from differentials; small finite changes yield approximations. The approximations will usually be not as good for larger changes, like 30%." Piggott (pp. 133) notes, 'The procedure [of equilibrium displacement modelling] is also valuable in allowing headway to be made in measuring the displacement effects of small (say, in the order of 10% or less) finite changes in exogenous variables.

21. Note that it is not the size of the change in the support measure per se that matters in this context, but rather the size of the induced changes in prices and quantities along producer and consumer demand schedules. Very large changes in support, even complete elimination of support – that is to say, a 100% change – need not have large effects on prices or quantities, depending on the policy in question and the degree to which such changes are made across multiple commodities and regions. Furthermore, so long as the movement from parameter "accuracy" to "inaccuracy" as price changes get large is a smooth one, sensitivity analysis is able to accommodate these changes in parameter values by demonstrating model results over a range of plausible parameter values.

3. Fisheries PEM model structure

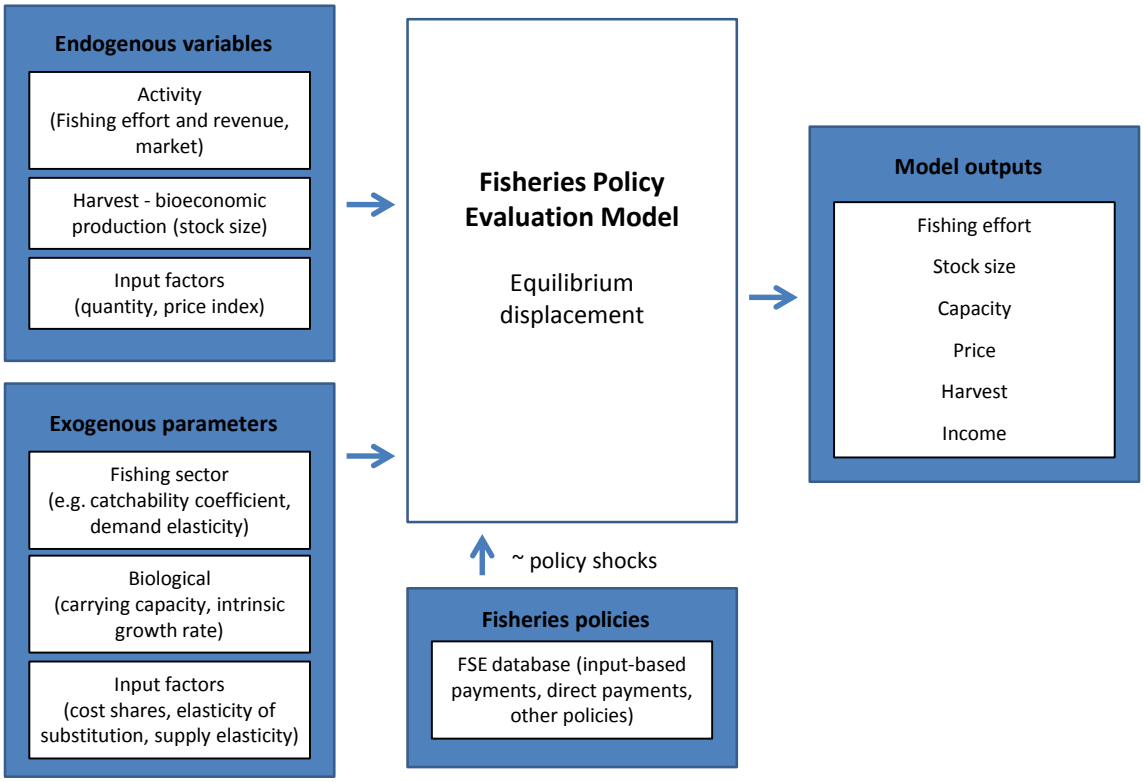
22. The basic Fisheries PEM is an equilibrium displacement model that contains explicit input markets which provide a direct connection between economic policy, fishery activities and their consequences with respect to indicators such as fishing effort, landings, income and stock status. It provides a stylized representation of effort, harvest and consumption for a single species fish stock that is being exploited by a single fishery.

Table 1 provides a list of the model equations and parameters and the framework is graphically outlined in Figure 1.

Table 1. Model equations in Fisheries PEM

Endogenous variables are	*Stands for*
P	Price
E	Effort
H	Harvest (also termed yield)
X	Stock size
x_j^d, x_j^s	Input supply and demand quantities *j*=1 to 5 inputs; fuel, vessels, hired crew, fishers' owned capital, other purchased inputs
w_j^d, w_j^s	Input supply and demand prices
Policy variable symbol	*Stands for rate of*
is	Transfers based on fisher's income
viu_j	Transfers based on variable input use, possibly specific to input *j*
rpc	Transfers based on the reduction of productive capacity
fcf	Transfers based on fixed capital formation
ou	Transfers based on quantity harvested (output)
Exogenous parameters are	*Stands for*
η	Demand elasticity for fish
c_j	Cost share of input *j* in producing fishing effort
σ_{ij}	Input elasticity of substitution between input *i and j*
ε_j	Input elasticity of supply for input *j*
r	Intrinsic growth rate
K	Carrying capacity
q	Catchability coefficient
Equations (dot above variable indicates percentage change)	
$H = qKE\left(1 - \frac{qE}{r}\right)$	Harvest (yield) function
$\dot{Q} = \eta \dot{P}$	Demand equation
$\dot{x}_j^d = \sum_i^n c_i \, \sigma_{ij} \dot{w}_i + \dot{E}$	Input demand
$\dot{x}_j^s = \varepsilon_j \dot{w}_j$	Input supply
$H \cdot P = \sum_j^n x_j w_j$	Zero profit condition

Figure 1. Fisheries PEM schematic



3.1. Fishing effort is determined by the underlying supply of inputs involved in production

23. The input market equations set out the demand and supply responses for the different inputs used by fishers and reflect the usual assumptions of profit maximisation constrained by the production relationship. Thus, fishery effort (and consequently production) is embedded in the equations that determine equilibria in these input markets and is determined endogenously. Anything that results in a change in input market equilibrium can therefore lead to a change in fishing effort. The extent to which this happens is determined by the elasticities of supply of the inputs and their prices, which may be influenced by policies.

24. The model structure currently accounts for two fishery-owned inputs: vessels, and a residual "other fishers' owned capital". The set of purchased inputs includes fuel and oil, hired labour and a residual "other purchased inputs" (Table 2).

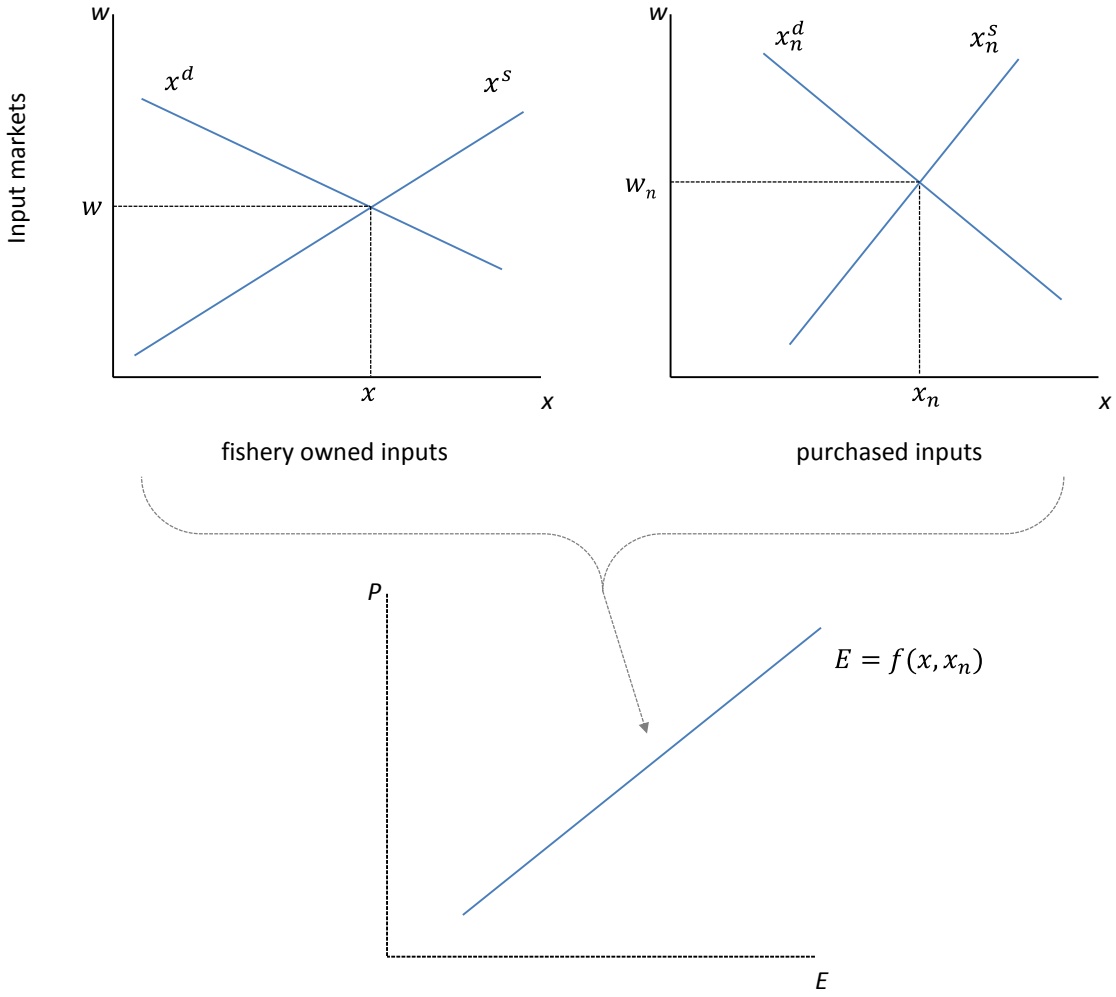
Table 2. Commodity and input coverage in Fisheries PEM

Fish		
All fish		
	Fishery-owned inputs	**Purchased inputs**
	Vessels	Fuel & oil
	Other fishery owned capital (entrepreneurship)	Hired labour
		Other purchased inputs

25. No input is assumed to be completely fixed in production, but vessels and other fishers-owned inputs are assumed to be relatively more fixed (have lower price elasticities of supply) than the purchased inputs. Likewise, no input is assumed freely mobile, but purchased inputs are assumed relatively more mobile (a higher elasticity of supply) than the fishers-owned inputs. Most supply parameters needed for the model will initially be chosen as reasonable "elastic" or "inelastic" values, but a more systematic choice involving expert input is planned by the Secretariat to ensure that parameter values (and their ranges) are objectively plausible for carrying out sensitivity analysis.

26. Using a simplified two input example Figure 2 contains supply and demand diagrams that illustrate the basic components of how the input markets function within the model and how they come together to determine fishing effort (*E*). The inputs in this example have been compressed into two aggregates: 'fishery owned' and 'purchased'. Where the demand and supply curves intersect at a given price determines effort at those input prices (given a price of fish).

Figure 2. How input supply and demand combine to determine effort

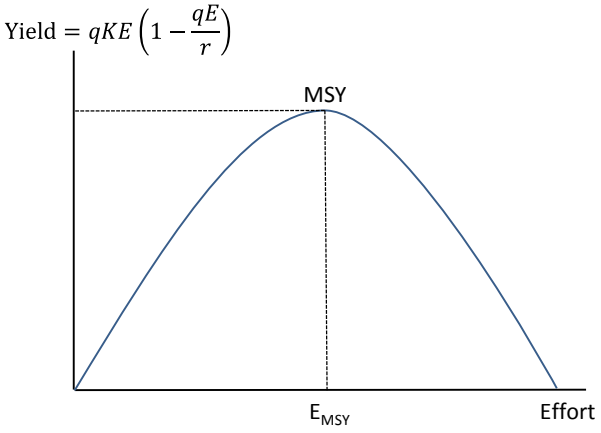


Note: Where x^d denotes the input demand curve and x^s the input supply curve, x is the input quantity supplied under equilibrium at input price w, P is the market price of fish and E is effort.

3.2. Fishing effort acts on the fish stock to produce a level of harvest

27. Fishery harvest, given any effort level, is determined using the Gordon Schaefer (Gordon, 1953[14]; Schaefer, 1954[15]) surplus production model. In the surplus production model, yield (harvest) is defined as the difference in biomass over time due to biological growth of existing fish, recruitment to the fishery (fish that survive the juvenile stage, becoming large enough to be available to the fishery), and natural mortality. Density dependence dictates that a surplus is possible because when the stock is fished down below its natural carrying capacity, stock growth will be faster, fish may mature earlier and survival can be higher. Based on the assumption that the stock grows according to the logistic growth function, the Gordon-Schafer model allows the relationship between biomass and harvest to be defined in a relatively simple manner (Figure 3).

Figure 3. The Yield-Effort curve

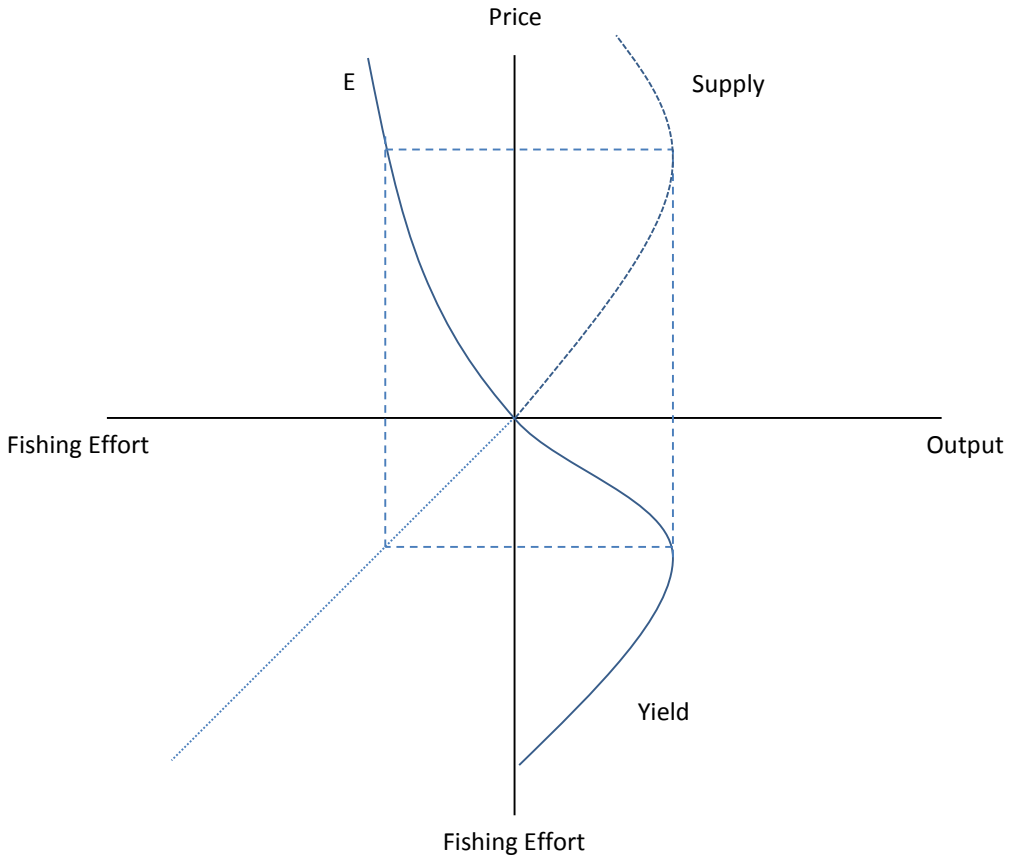


28. These components are enough to define all the relationships in the product market space. Effort can be expressed as a function of the price of fish, given input market prices (Figure 4, NW panel). Input price changes will shift this curve, while the price of fish induces a movement along this curve. A given price will induce a level of effort which in turn determines harvest according to the Gordon Schaefer yield-effort function (Figure 4, SE panel). Taken together, this results in a supply function that identifies the level of harvest implied by any given price (Figure 4, NE panel).

29. The supply function bend backwards; as fish prices increase so does the overall level of effort being applied to the fishery. Harvest increases with effort up until the point of MSY, beyond which it begins to decline as the stock becomes overfished.

30. There are some inherent difficulties in developing a fisheries model containing economic, bionomic and management components. The most severe of these is over-specification; any one of these three elements is sufficient to derive an equilibrium quantity so in any given simulation some equations will be redundant in determining the harvest level. This can be handled by testing for what is the binding constraint in the model at any given point and excluding the irrelevant elements. However, this can lead to cases where the main model output is determined by exogenous elements such as a binding TAC. Ideally, endogenous elements should be the most important in determining model behaviour and output. Some experimentation will be required to find a model structure that delivers results that are meaningful and useful.

Figure 4. Correspondence of price, effort and quantity



Source: Adapted from Copes (1970[16]).

3.3. FSE categories enter the model as rates of support that can be changed as part of policy experiments

31. The main purpose of the Fisheries PEM project is to bridge the gap between the FSE information, which categorises and quantifies fisheries support in OECD countries, and the effects of that support on sustainability, trade and livelihoods. The simple model developed here allows these to be assessed in a limited way, i.e. effort, harvest and prices for a single stock and fishery. Additional species and other sources of complexity will be built into later versions of the model.

32. Given its partial equilibrium and static nature the Fisheries PEM is an appropriate instrument to capture relative price effects of different kinds of support policies. It is not expected to specifically capture other kinds of effects of different support policies such as income effects under constraints, risk related effects and expectations or other dynamic effects. However, part of these effects could be implicitly captured in the parameter values, thinking of the Fisheries PEM as a reduced form of a more sophisticated model. That is, changing parameter values can be a way to investigate different scenarios.

33. The starting point is the FSE classification, which is based on implementation criteria. Six of the main kinds of support defined in this classification appear in the model with a specific initial incidence on input and output prices. As in any economic model of

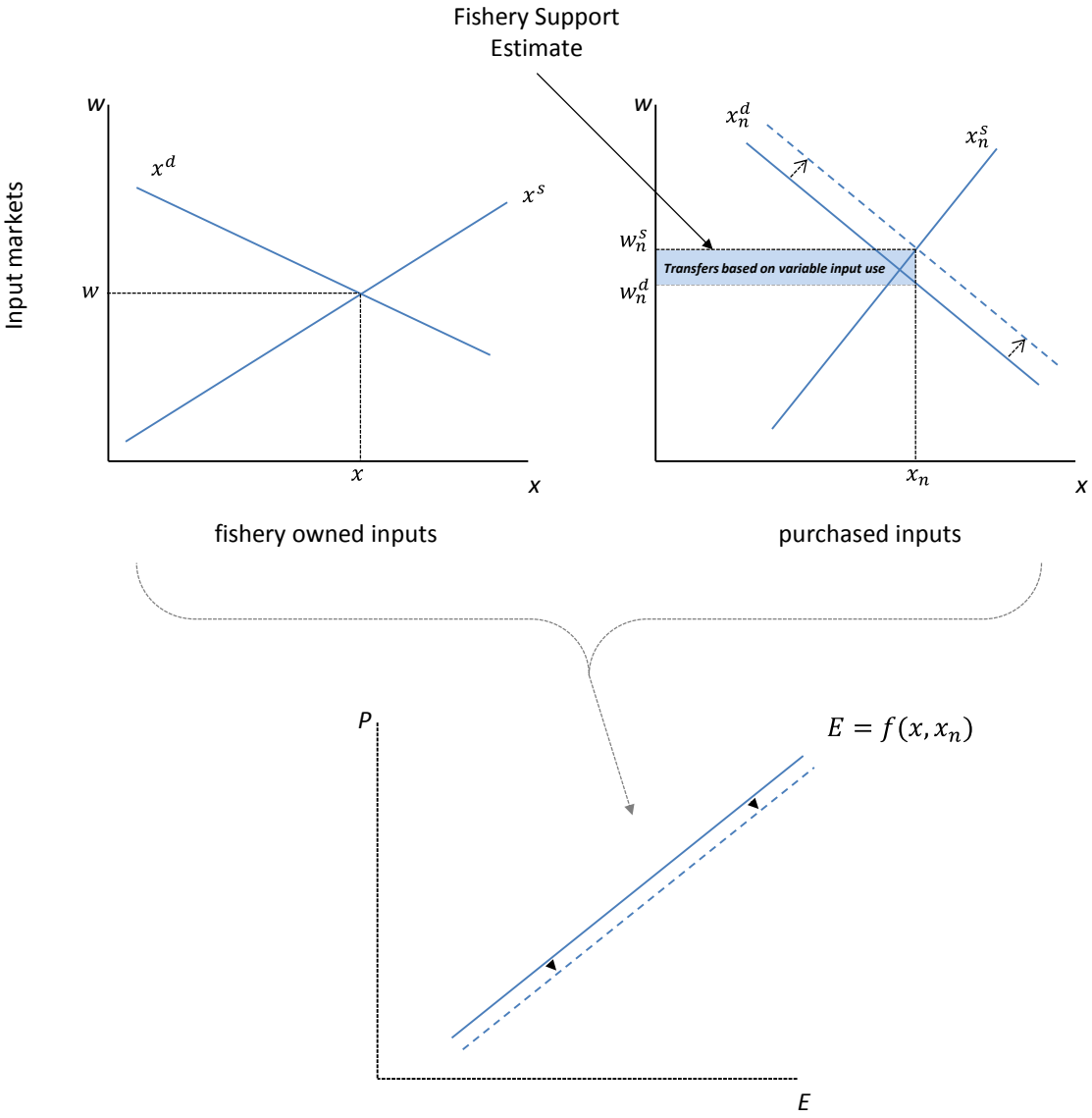
policy effects, it is difficult to represent the mechanisms of policy implementation and therefore their incidence in complete detail.

34. The Fisheries PEM does not represent in a fully comprehensive manner the specifics of support programmes. Rather, the aim is to represent the incidence of support policies as implied by their classification in the FSE. In this system, policies are classified according to the main or primary condition that fishers must meet in order to be eligible for the support. Usually, knowledge of the conditions of eligibility of a particular support measure, as revealed by its classification in the FSE, will be enough to infer its initial incidence. Policies that fundamentally limit production or affect prices (e.g. TACs) are not currently included in the current model but will be added in future versions.

35. To illustrate how policies are represented in the Fisheries PEM, the simplified version of the input markets, as illustrated in Figure 2, is reproduced in a modified form in Figure 5. As before, this represents the model in the form of one single species fishery with one output and two inputs (the aggregates: 'fisher owned' and 'purchased'). Policy measures are introduced into the model through the use of policy wedges. Figure 5 illustrates how a price wedge corresponding to subsidies based on variable input use (reduction in input costs) is represented in the Fisheries PEM model, as indicated by the shaded area in the purchased input market.

36. The wedge relating to payments based on variable input use separates the price suppliers receive (w^s_n) from the prices paid by the fishery (w^d_n). No consideration is given to the specific policy instrument actually creating the price wedge. The impact on input demand of a price wedge for payments based on variable input use is illustrated through an outward shift in the associated demand curve (Figure 5), resulting in a new equilibrium point and an increase in the quantity of variable input being supplied. The way that this change then affects effort is illustrated in the bottom pane of Figure 5, where the effort curve shifts out in response to the altered input market conditions and results in a greater level of effort being supplied under any given price. The effort function shown in the bottom panel of Figure 5 is the same as shown in Figure 4, NW panel, but with the axes flipped.

Figure 5. Policy representation in the Fisheries PEM



Note: Where x^d denotes the input demand curve and x^s the input supply curve, x is the input quantity supplied under equilibrium at input price w, w^d is the input price paid by the fishery, w^s is the price received by the input supplier, P is the market price of fish and E is effort.

37. Transfers based on fisher's income are introduced in the same manner within the model, but in this particular instance the wedge separates the price fishers earn as a result of using their vessels and other owned inputs in production from the return those inputs would earn in some alternative use. The remaining FSE categories are also captured with price wedges in the Fisheries PEM model; transfers based on the reduction of productive capacity, transfers based on capital formation and cost recovery. Transfers based on the reduction of productive capacity are distinguished from transfers based on capital formation by the addition of a constraint on the quantity of the "vessels" input that may be offered in that input market.

Table 3. How different categories of the FSE are represented in the Fisheries PEM

FSE classifications	First incidence of support in price wedge between
Transfers based on fisher's income	Supply and demand of all inputs owned by fishers: vessels and other fishery owned capital
Transfers based on variable input use	Supply and demand price of purchased inputs; may apply to one or more input markets depending on policy
Transfers based on fixed capital formation	Supply and demand for vessels
Transfers based on the reduction of productive capacity	Supply and demand for vessels, with constraint on supply response
Transfers based on output (harvest)	Supply and demand of fish

38. Table 3 summarises the first incidence of different categories of support in the Fisheries PEM. The impact of a marginal change in support within a given category depends critically on the pre-existing level of support within that same category. In general, the greater the pre-existing levels of support the smaller the effects of incremental changes. This is an important source of non-linearity using the model.

39. First incidence of support was determined on the basis of (OECD, 2017[2]), which was itself derived from the work of (Dewbre, Antón and Thompson, 2001[17]; Hertel, 1989[10]), (and has been confirmed in OECD (2001[5]) and Martini (2011[4])).

40. Support to general services, fisheries management in particular, is often categorised as a beneficial subsidy that has the effect of reducing effort and improving sustainability (Sumaila et al., 2016[18]). This is not considered in the model in the present version, but could be incorporated at a later stage.

41. In order to undertake policy simulation experiments the model must be calibrated for a specific base year. This calibration includes all input and output quantities, the set of domestic prices for fish and inputs of production, initial stock level and rates of support implied by the quantities in the FSE database. Fish quantities will be taken from landing data. Most input prices are defined as an index with initial value of 100. Input quantities are subsequently derived from cost shares and revenue, using the zero-profit condition. Exceptions are inputs where quantity data, taken from various sources, is known and for which the cost shares and zero-profit condition then imply the price. Supply response corresponding to a medium term adjustment horizon of three to five years is reflected in the values assumed for the price elasticities of input supplies and the parameters measuring the substitutability of inputs in production as well as the input shares. These elasticities are drawn from the Aglink model using observed quantity responses at year five following a price shock to the model.

3.4. The effects of support can be estimated using indicators produced by model output

42. Table 4 lists the main indicators of policy effects used in measuring the effects of policy changes. These indicators are measured in the standard way of economic models using the functional specification of the Fisheries PEM. After any assumed quantitative change in support, the model adjusts the entire set of input and output prices to obtain a new equilibrium. Calculating the change in the value of the various indicators between the initial and the final equilibrium gives the estimated policy effects of interest.

43. The level of support in each FSE category is an exogenous parameter that can be changed as part of a simulation experiment. Introducing such a change and observing the effect on the equilibrium in the model is the basis of the model's operation and output. For example, an income elasticity with respect to a policy can be calculated by changing the policy level by 10% and observing the change in income earned in every input market that is induced (calculated as producer surplus). Repeating this process for all policy categories and all effects of interest (price, harvest, capacity, stocks) will yield a matrix of policy impact indicators. This matrix as noted earlier will be conditioned on the management system as the model continues to be refined.

Table 4. Fisheries PEM indicators of policy effects

Indicator	Definition of measure
Fishing effort	Total change in fishing effort
Stock size	Change in stock biomass
Capacity	Change in quantity of "vessels" input
Price	Change in market price of fish
Harvest	Change in quantity of fishery landings
Fisher's welfare	Change in producer surplus for vessels and other fisher-owned inputs, plus change in resource rents (once implemented)
Taxpayers costs	Total change in net government expenditure for all policies represented in model
Consumers costs	Change in consumer surplus
Transfer efficiency	Fishery welfare / (taxpayers + consumers costs)
Input supplier benefits	Change in producer surplus of fuel, hired labour and other purchased inputs

44. The results are determined by the model structure and parameters. The structure will determine what variables and parameters are important and the parameters will scale the impact of a policy. The sensitivity of the results to certain parameter values and the plausible range of impact can be identified by using Monte Carlo analysis--randomly varying parameter values in order to generate probability distributions for the impact ratios.

4. Questions for delegates

45. The Fisheries PEM is still in the early stages of development but it is anticipated that the model can play an important role in improving understanding of the effects of different types of policy instruments on key fisheries variables such as profit, harvest, capacity and stock status. How the model develops from its current form (i.e. single species, single fishery, single 'fish' output') will be important in determining the questions it is able to answer and how useful it is in the near term.

46. Advice is sought from delegates on what their priorities are for the next steps of model development. For example, how much focus should be dedicated to elaborating management measures vs. stock dynamics vs. increasing the number of stocks vs. adding production details? An expert meeting is foreseen in 2018 to review the model and the data used and gain advice on next steps.

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2017 REVIEW OF FISHERIES

PUBLICATION & COMMUNICATION

Agenda item 3,120th COFI 14 NOVEMBER 2017

OECD
BETTER POLICIES FOR BETTER LIVES

Publication timing constraints

- **Target release date**
  - electronic: 27 November, 2017
  - Printed: 4 weeks after online version

    (January 2018, because of holiday season)

- **Time constraints**
  - Send the final manuscript to editorial unit: 20 November
  - **Declassification** of the general survey **at this meeting**

Contents of the publication

- **Electronic version**
  - Part 1 (general survey) + Part 2 (full text of each country chapter)

- **Printed version**
  - Part 1 (general survey) + Part 2(first 2 pages of each country chapter*)

  * Key developments box and infographic

Communications Campaign

- **Timeline**
  - 27 November 2017 - 31 January 2018
- **Tools**
  - Press release: **27 November**
  - Publication alert: **short briefing note that Delegates can forward upstream in their Ministries**
  - 2 email newsletter campaigns: **beginning of December**
    - **What's New**
    - **Agriculture News**
  - Policy note: **mid-December**
  - Updated fisheries webpages: **main page and FSE database**
  - Social media: **@OECDAgriculture and @OECD accounts**

GENERAL SURVEY OF THE REVIEW OF FISHERIES

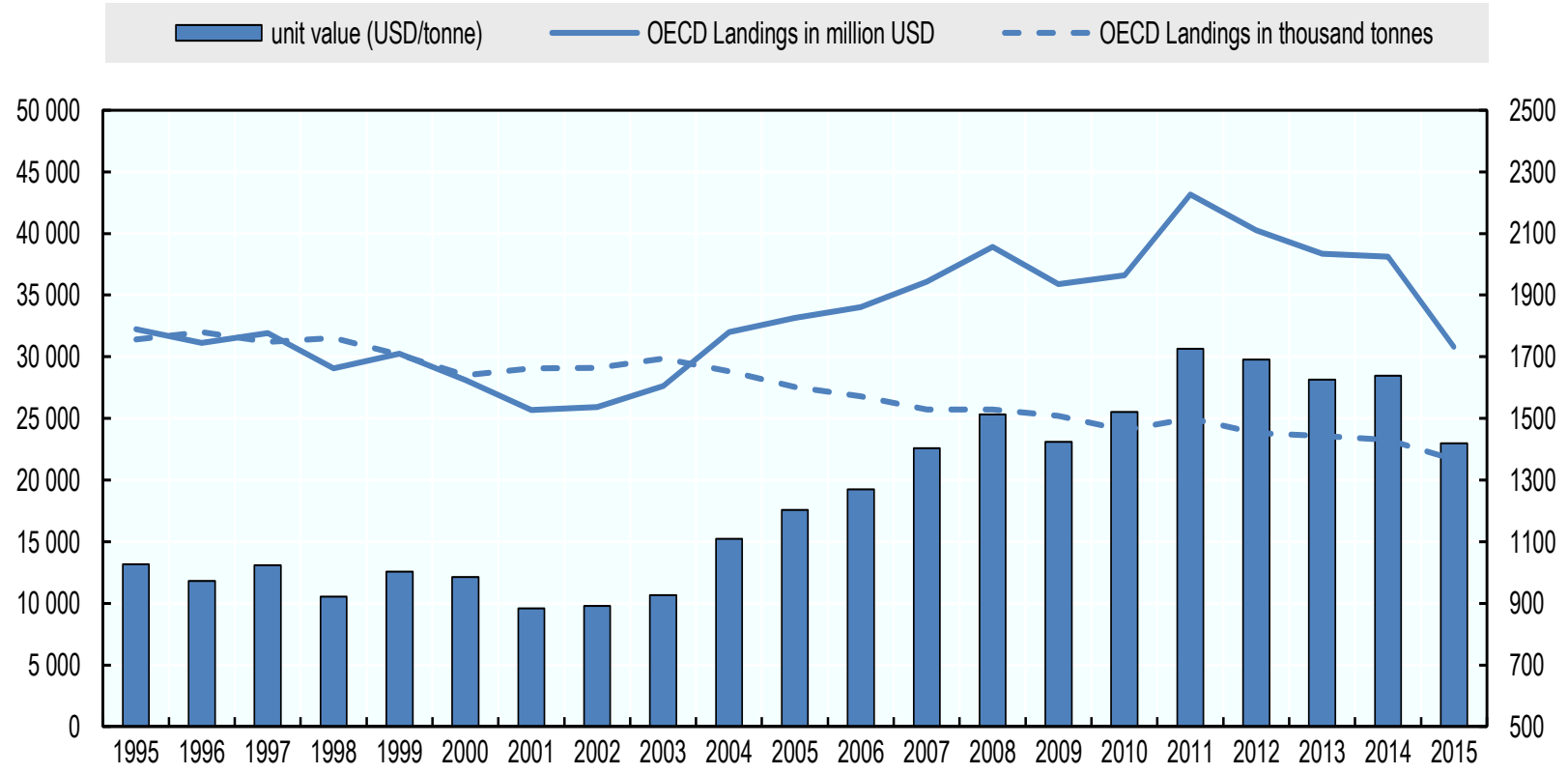
Objective of the General Survey

- Provide an overview of trends in fisheries and aquaculture policies in participating countries and economies.
- Condense and present thematically the recent policy changes discussed in the country chapters
- Present OECD data

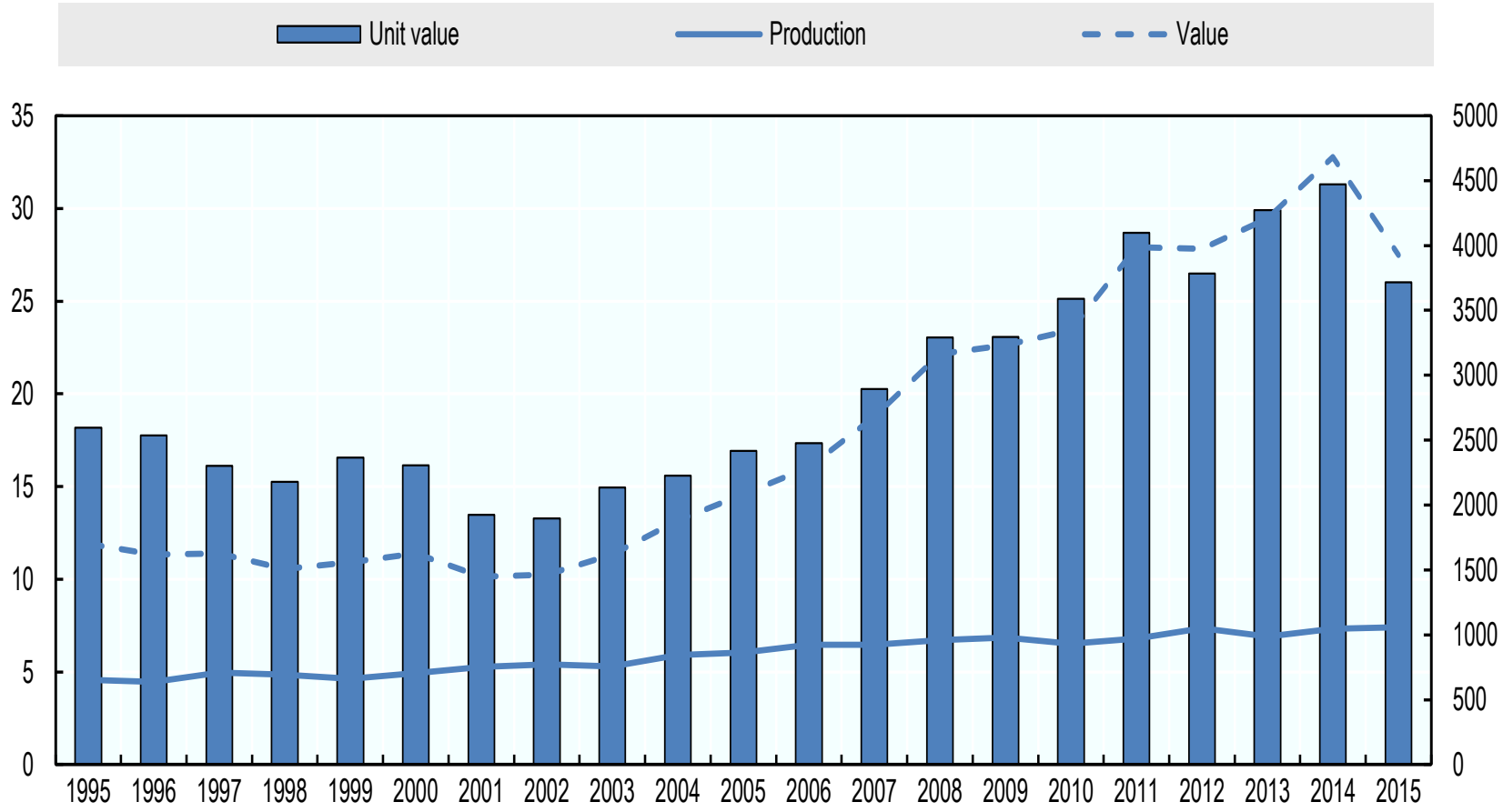
Main messages

- China's emergence as a global fishing superpower, and major provider of support to fisheries
- The emergence of aquaculture as the future of fish supply
- The progress made and continuing challenges in capture fisheries sustainability

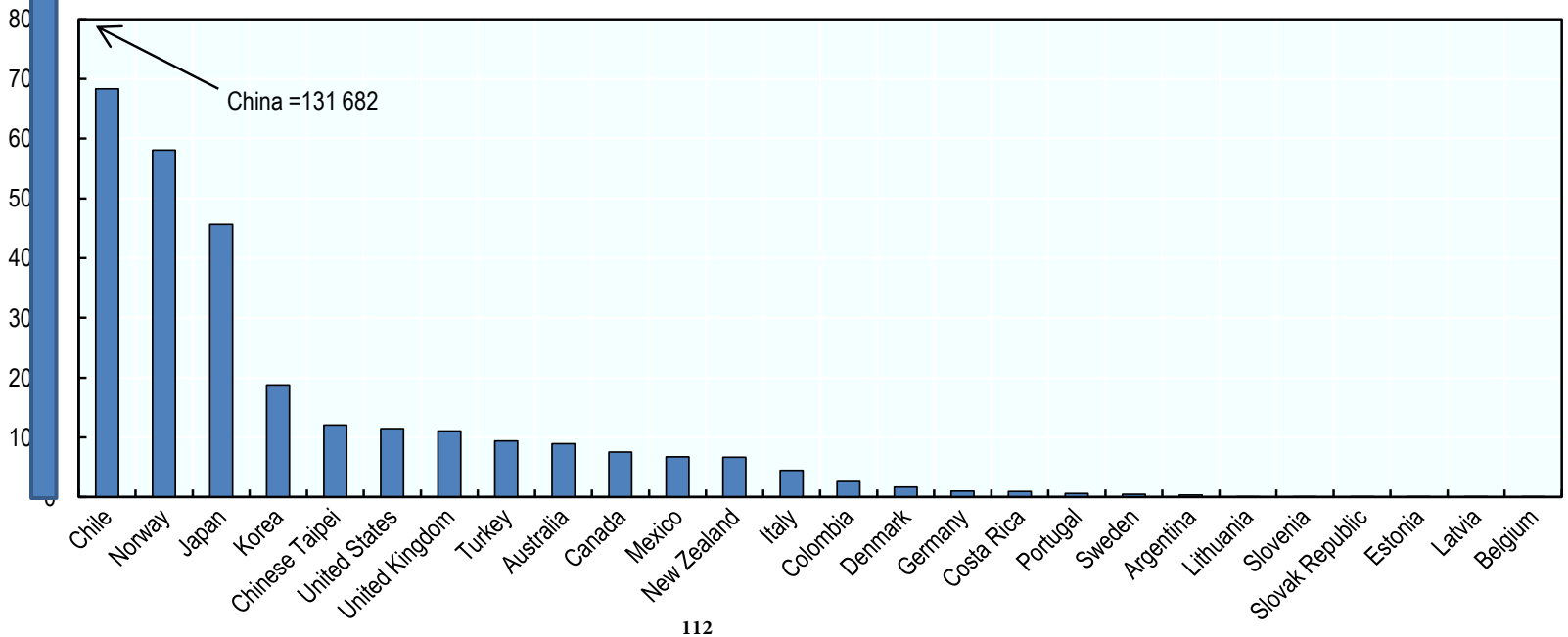
Decline in capture fisheries partially masked by higher prices



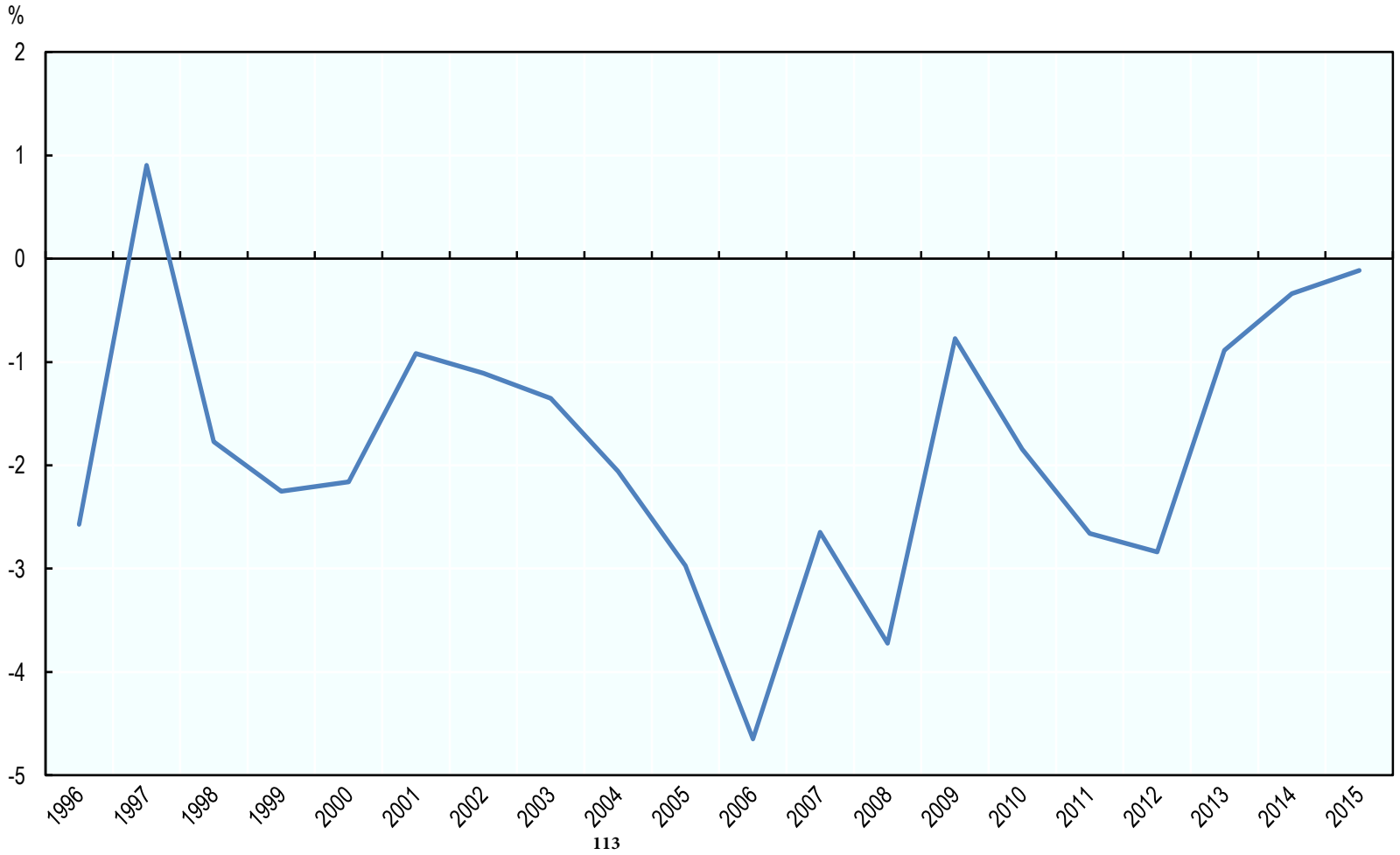
Aquaculture growth accelerating in OECD region



Aquaculture in China!



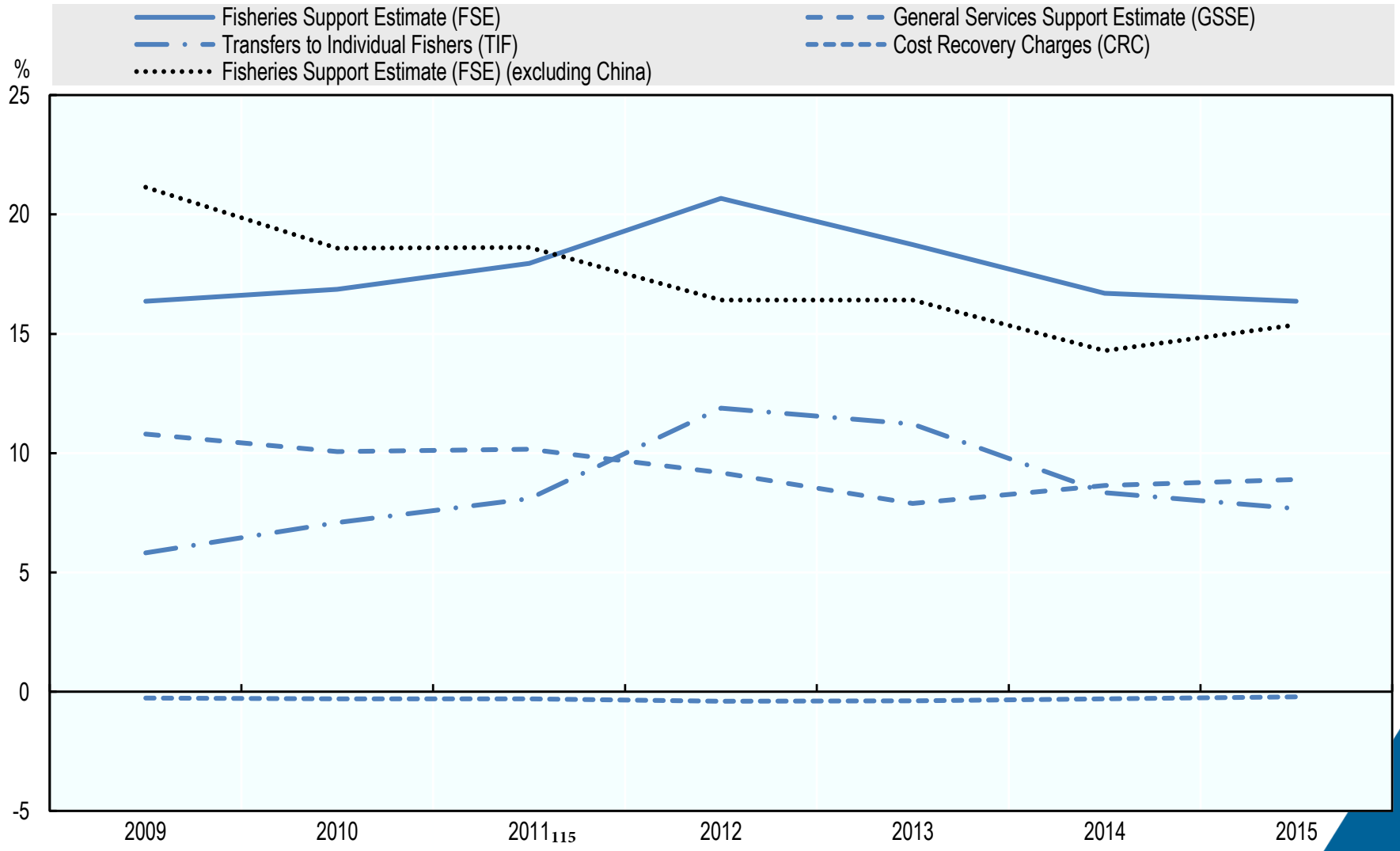
Percentage change from previous year in fishing vessels



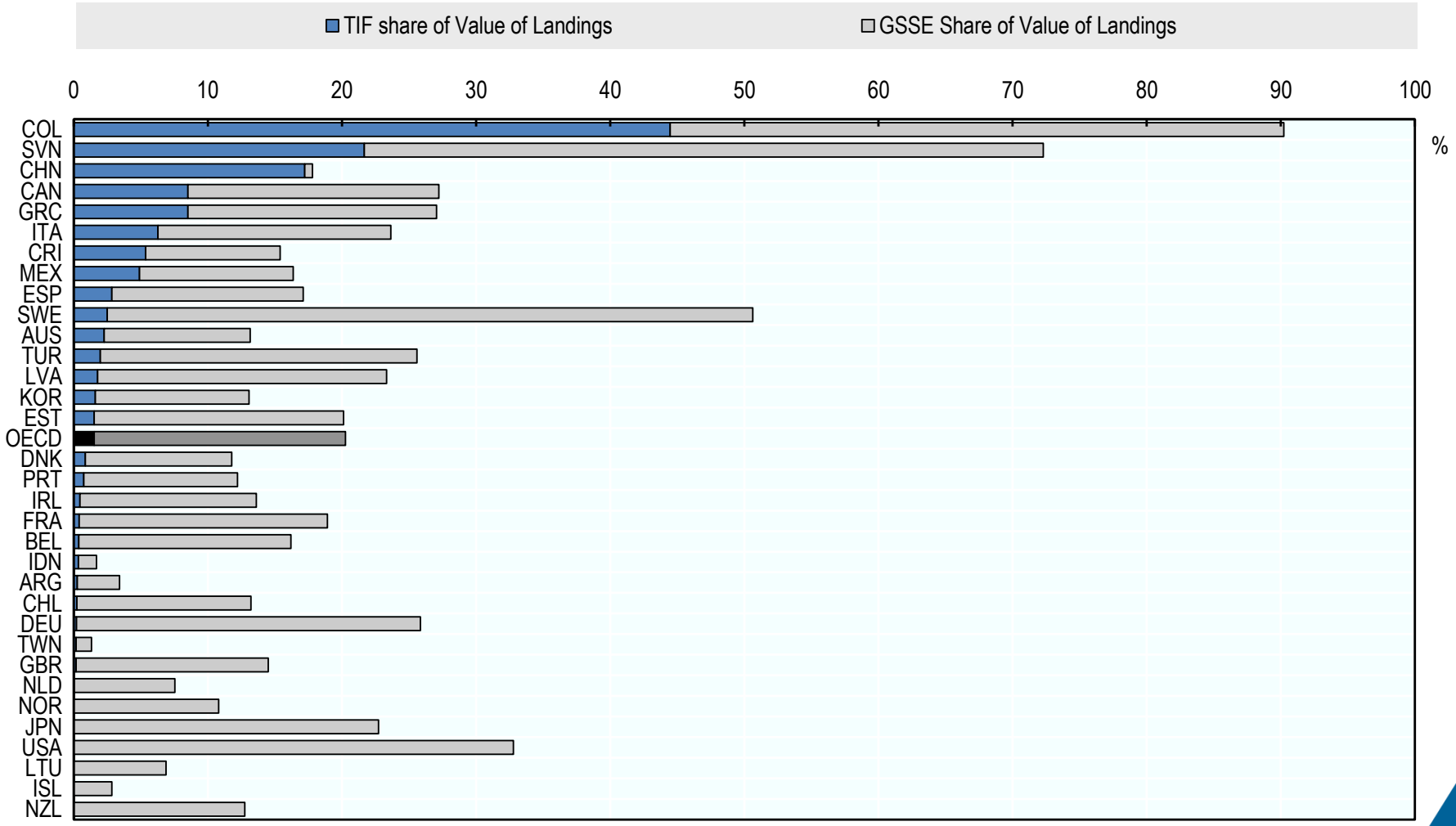
Adding China shifts perspective on support

- Greater prominence of TIF due to support to fuel use.
- Downward trend in support much less obvious
- Chinese support highest or nearly highest in several categories

Overall trend in support as a share of value of landings



Support to fisheries as share of value of landings



Finalisation of the General Survey

- Draft provided on Delegates' Corner in September
- Revision for declassification at this meeting.
- Your comments will be taken into account immediately and a new version produced during this meeting.

2017 REVIEW OF FISHERIES COUNTRY CHAPTERS

Agenda item 3,120th COFI 14 NOVEMBER 2017

OECD
BETTER POLICIES FOR BETTER LIVES

Goals and achievements

- Expansion of participation in the Review

✓ Increased: (2017) 36 chapters
(2015) 31 chapters

- In: Colombia, EU, Italy, Lithuania, Slovenia, Thailand
- Out: United Kingdom

Goals and achievements

- Set a standard structure to ensure consistency among countries
  - One page infographic is the key factor

✓ All chapters are standardised
✓ However, not all countries provided complete data for infographic

- Using the latest data (Y-1, 2016)

✓ Data used are mainly from 2015

Changes: Infographics

Fisheries and aquaculture statistics in Australia

Value of production

in global context

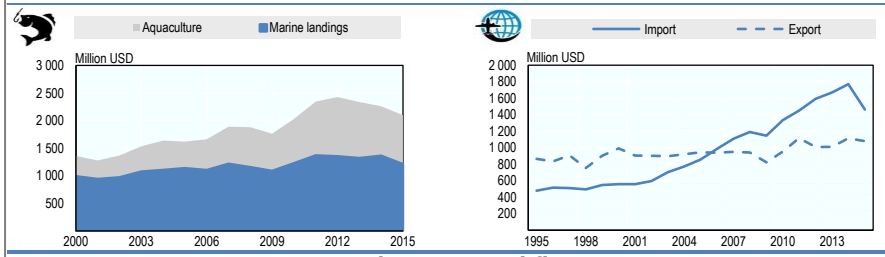
USD 2 099 million
Total value of fisheries and aquaculture

1.0%
Share of global fisheries landed value

0.5%
Share of global aquaculture production value

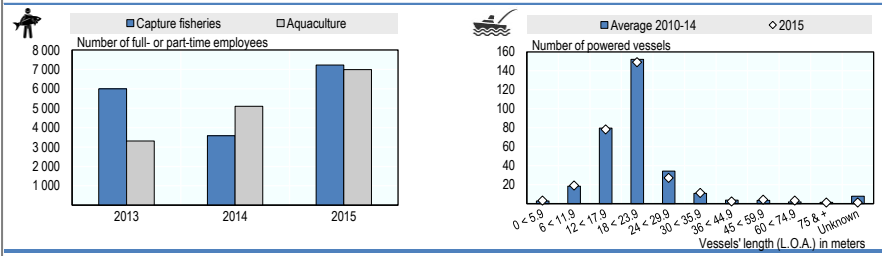
Trends in production value and trade

Total production value in USD decreased at an annual average rate of 2.7% between 2011 and 2015



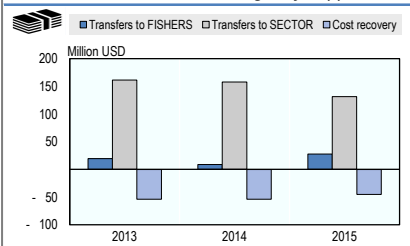
Employment and fleet

Employment in capture fisheries increased by 101.6% between 2014 and 2015 to 7 225 persons



Government support and resource management

73% of total budgetary support was directed to management of resources in 2015



232 Number of stocks with established targets or thresholds recently subject to quantitative assessment

of which

201 Number found to have acceptable status with respect to targets or thresholds

Fisheries and aquaculture statistics in Norway

Value of production

in global context

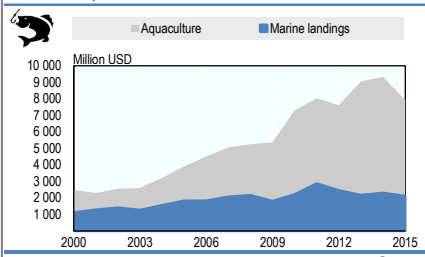
USD 7 918 million
Total value of fisheries and aquaculture

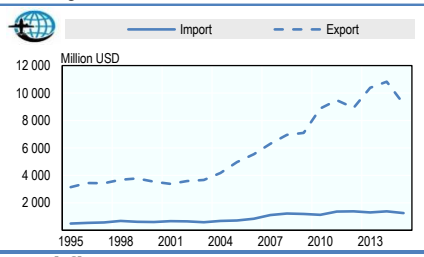
1.7%
Share of global fisheries landed value

3.6%
Share of global aquaculture production value

Trends in production value and trade

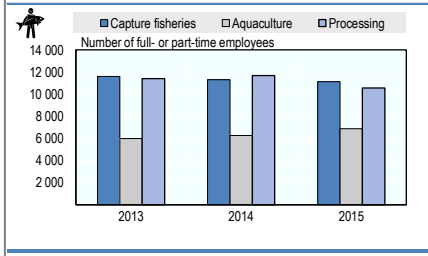
Total production value in USD decreased at an annual average rate of 0.4% between 2011 and 2015

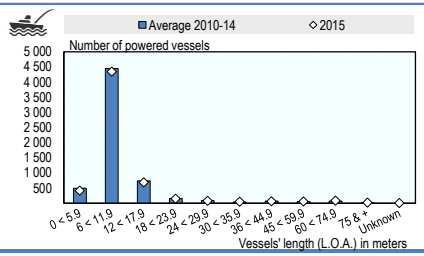




Employment and fleet

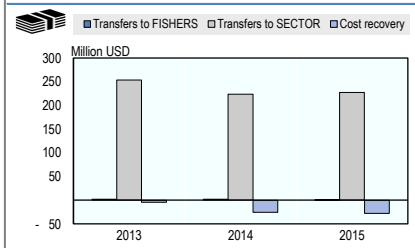
Employment in capture fisheries decreased by 1.5% between 2014 and 2015 to 11 130 persons





Government support and resource management

55% of total budgetary support was directed to management of resources in 2015



75 Number of stocks with established targets or thresholds recently subject to quantitative assessment

of which

47 Number found to have acceptable status with respect to targets or thresholds

Changes: management tools by species

Mackerel	Chub mackerel and blue spotted mackerel
Management goals	Sustainable resource management; stock status is categorised according to three levels, based on trends over the past 20 years. If the stock level is low, it should be restored. If it is medium or high, it should be maintained.
Output controls	TAC is determined based on the stock assessment (ABC). In 2016, it was 822 000 tonnes. This volume was assigned to license divisions (the county, prefectures) and regions.
Input controls	Mackerel fishing uses various methods such as seine fishing, and set net fishing. Seine fishing requires a fishing permit. If gross tonnage of vessel is more than 40 tons (or 15 tons, depending on fishing areas), fishing permission issued by the MAFF is required. If gross tonnage is more than 5 tons, prefectural governors issue permissions. In addition, the number of licenses, the size of fishing vessels, and fishing areas are limited. Depending on local circumstances, other regulations such as fishing periods, and prohibition of lights for fishing can be added.

Changes: institutions and authorities

- **The Ministry of Oceans and Fisheries** is responsible for fisheries and aquaculture policy formulation. Four government bodies contribute policy implementation:
  - The National Fisheries Products Quality Management Service (**NFQS)** is in charge of quarantine and inspection of fish and fish products.
  - The National Institute of Fisheries Science (**NIFS**) leads research and development of the sector.
  - The East Sea and West Sea Fisheries Management Services (**ESFM and WSFM**) monitors illegal fishing and guides safe fishing.
  - **Eleven Regional Offices** of Oceans and Fisheries manage the implementation of laws and regulations.

- More information can be found at www.mof.go.kr/english/index.do.

Changes: headlines

Policies and policy-making

- The US National Marine Fisheries Service is on a path to advance ecosystem-based fisheries management.
- The US strengthens enforcement tools for IUU fishing.
- The US launched the first regional regulatory programme for offshore aquaculture in federal waters.

- Colombia has developed and implemented a new comprehensive policy to coherently manage its marine resources.
- Colombia tackles illegal fishing in newly-introduced regulations.
- Colombia's aquaculture sector follows the development plan adopted in 2014.

Changes: headlines

Health of the sector

- Domestic production of fisheries products in the US from both marine catches and aquaculture is stable.
- US per capita consumption of fisheries products increased from 2013 to 2015.
- The number of stocks considered overfished or experiencing overfishing in US water is decreasing.

- Colombia's marine catches are decreasing since 1990s.
- Imports of fisheries products are increasing following new regional trade agreements and resulting lower tariffs.
- El Niño weather event caused a decrease in aquaculture production in 2016.

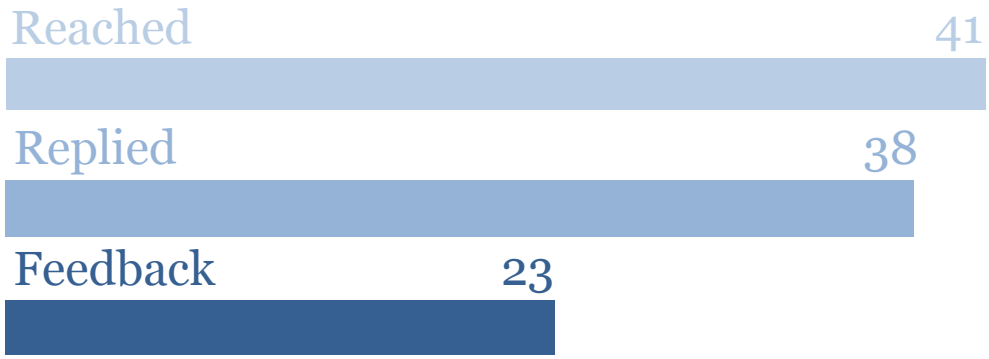
ITEM 3.D
REFLECTIONS ON THE 2017 REVIEW OF FISHERIES PROCESS

Fabiana CERASA
fabiana.CERASA@oecd.org
Statistician
Trade and Agriculture Directorate, NRP Division, Fisheries

2017 Data call

Launched on the 1st March 2017

- 41 countries reached
- 38 countries replied (84%)
- 61% of them sent feedback



Feedback – Main outcomes

- METADATA difficult to complete
- ASFIS codes & species identification
- AVOID DUPLICATIONS!

METADATA difficult to complete

A new template will be designed			
Reducing the number of metadata items	Providing clear explanations	Using examples	Pre-filling fields wherever possible

ASFIS codes & species identification

Data are currently collected by OECD using the ASFIS list, which is an **international standard**

This standard is used by any other fisheries agencies

(FAO, EUROSTAT, JRC)

Data by species should be reported to OECD **exactly as they are reported to any other fisheries agencies**

Avoid duplications with other agencies

AQUACULTURE

- Data will directly sourced from FAO public platform (FishstatJ)
- NO QUESTIONNAIRE will be sent by the OECD
- WHEN: 2018 data call

EMPLOYMENT

- We are working with FAO on a future shared data collection
- ONLY 1 COMMON QUESTIONNAIRE will be sent by the two IOs

FLEET

- We are working with FAO on a future shared data collection
- ONLY 1 COMMON QUESTIONNAIRE will be sent by the two IOs

How data collection is evolving

1. Marine LA

FAO collects data on CATCHES in TONNES
- ✓ not LANDINGS
- ✓ not VALUES

2. AQUACULTURE

3. INLAND F — FAO has data in tonnes BUT not in VALUE

4. EMPLOY — Working with FAO on shared data collection

5. Fishing I — Working with FAO on shared data collection

6. FSI — ONLY collected by OECD

7. TA — ONLY collected by OECD
EU countries: EC as potential source BUT there are issues

8. TARGETS & TH — ONLY collected by OECD - Under development

2018 Data CALL

Questionnaire MAIL OUT:

1st May 2018

DEADLINE for completion:

31st August 2018

DATA RELEASE:

by end 2018

REFLECTIONS ON THE 2017 REVIEW

Item 3d of the Draft Agenda of the 12th COFI

What have we done?

why did we do it?

what have we learned?

Some of the issues identified with the old Review

- Data are old (Y-2 or Y-3)
- Little consistency across countries
- English editing poor
- Design is out of date
- Not enough focus on OCED data
- Not enough high-value information

So, what did we do to respond?

- Shortened preparation period to try to get Y-1 data
- Changed template structure of country chapters and increased level of editing
- Eliminated all figures and discussion not primarily using OECD data
- Added more data, including management tables and new “targets and thresholds”

What have we learned?

- Focus on OECD data was a good idea
- A tight schedule doesn't work when coordinating 36 countries
- Simultaneous data processing and chapter writing is risky and increases workload
- Y-1 (2016) data is not possible
- Increased editing of country chapters improves them, but is costly in staff time

What now?

The Review is better than ever before…

…But is it a good return on investment?

Can we more clearly identify its audience and define its purpose?

DISCUSSION OF PWB 2019-20

Item 5 of the draft agenda of the 120th Session of COFI

What makes a good PWB item?

- Connects to the mission of the COFI and that of the OECD as a whole
- Takes advantage of horizontality where possible
- Reflects OECD principles

…and offers value to members

What makes an output valuable?

- New
- Relevant
- Interesting
- Contributes to resolving a problem or debate
- Clear audience and purpose

What implies an output is not valuable?

- Safe
- Foregone conclusion
- Results disconnected from data
- Overly general in scope
- In areas already receiving lots of attention where OECD has no special advantage
- No connection to policy

Practical elements of a PWB item

- Tolerable workload for members
- Sufficient resources available for the work
- Consensus on importance of topic
- Clear path to success:
  - Enough policy space to welcome OECD input
  - Understanding at outset what are the pain points and how they can be addressed

Let’s talk!

Identifying reform pathways for sustainable fisheries management

Item 6, 120th COFI session

Claire Delpeuch

Recap of objectives for this project

- To provide a comprehensive picture of fisheries reforms in the OECD and partner economies over the past decade;
- To use evidence thereof to identify the key determinants of the emergence, design, adoption and implementation of fisheries reform;
- Formulate practical recommendations for policy-makers on how they can best engage fisheries reforms.

Intermediary inputs in the project

- Phase 1: literature review
- Phase 2: test phase for the questionnaire

1. Draft analytical framework for discussion
2. Questionnaire for information collection to be launched soon after the meeting
3. A conference will be organized in May 2018 to discuss preliminary findings among key actors of fisheries reforms

Analytical framework

Draft for discussion

- Coordination with political economy work in other parts of OECD
- No examples at this stage

→ Feedback on the Framework?

→ Additional reform determinants we should consider?

→ Please share relevant reports

Questionnaire

Will be sent soon, deadline end January 2018

- Section A
  - Characterization of policy instruments and management practices in 2005 & 2016
  - Pre-filled by Secretariat for 2005
- Section B
  - Characterization of a particular reform process (to be chosen from changes reported in Section A)
  - Opinion of respondent on potential determinants

→ Important to identify the right respondents in Government

→ Please share contacts of potential respondents from the private sector & civil society (section B only)

Conference

Preparation soon launched

- *Making Reform Happen for Sustainable Fisheries w*ill take place at the OECD, in Paris, in May 2018 (during 121st COFI)
- VC-funded
- Objective is to deepen discussion on key issues emerging from the analysis of the information collected & look for practical recommendations to feed the final report
- Key opportunity to invite policy-makers directly involved in reforms, including from outside OECD countries

→ Please share contacts of potential invitees

→ Please communicate about the conference

INFORMING TRADE NEGOTIATIONS

Item 9 of the Draft Agenda of the 120th COFI

RECEPTION AND FEEDBACK ON THE NEW FSE

Reception of the FSE has been positive

- More than 300 hard copies distributed
- Lots of appreciative feedback from WTO negotiators and others involved
- Seen as a high-quality alternative to existing information
- Structure has been cited as a model

Feedback from WTO delegations

- Expand country coverage, especially China, other BRIICS and large fishing nations or subsidisers
- Draw closer connections to concepts in negotiations
  - IUU, overfishing, overcapacity
  - Looking for more practical guidance for an agreement, and tools and models to follow

Feedback from others

- Expand country coverage
- Expand scope of coverage
  - *fuel tax concessions*
  - *Aquaculture*
  - *Social benefits, regulations*
- Improve confidence in data
  - *Lack of a process to ensure completeness and accuracy of reporting is seen as a problem.*
- More information and explanation of the database

Some perspectives heard on the nature of support

- Most people assume support to general services is benign and should be encouraged
- But, some reluctance to consider any support under TIF as beneficial
- Distinctions on basis of recipient gaining traction
  - Support to *IUU fishers*
  - Support to those fishing *overfished stocks*.

UPDATE ON MODEL DEVELOPMENT

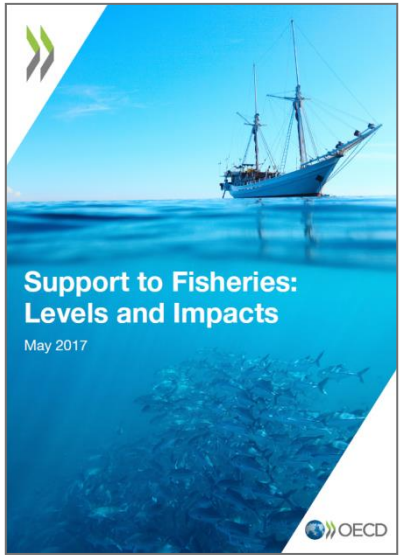
Item 3.2.3.4.5 Informing fisheries-related trade negotiations (2017-18 PWB)

- **Aim** is model to assess effects of support policies:
  - International objectives, driven by concern regarding overcapacity, overfishing and IUU (e.g. SDG 14.6; WTO negotiations on fisheries subsidies)

- **Objective** to answer questions on impacts of support policies on:
  - Overfishing, overcapacity, sustainability, private benefits of policies

Phased approach

1. Presentation of FSE data; review of the literature regarding impacts
   – *Support to fisheries: Levels and Impacts* (OECD 2017)



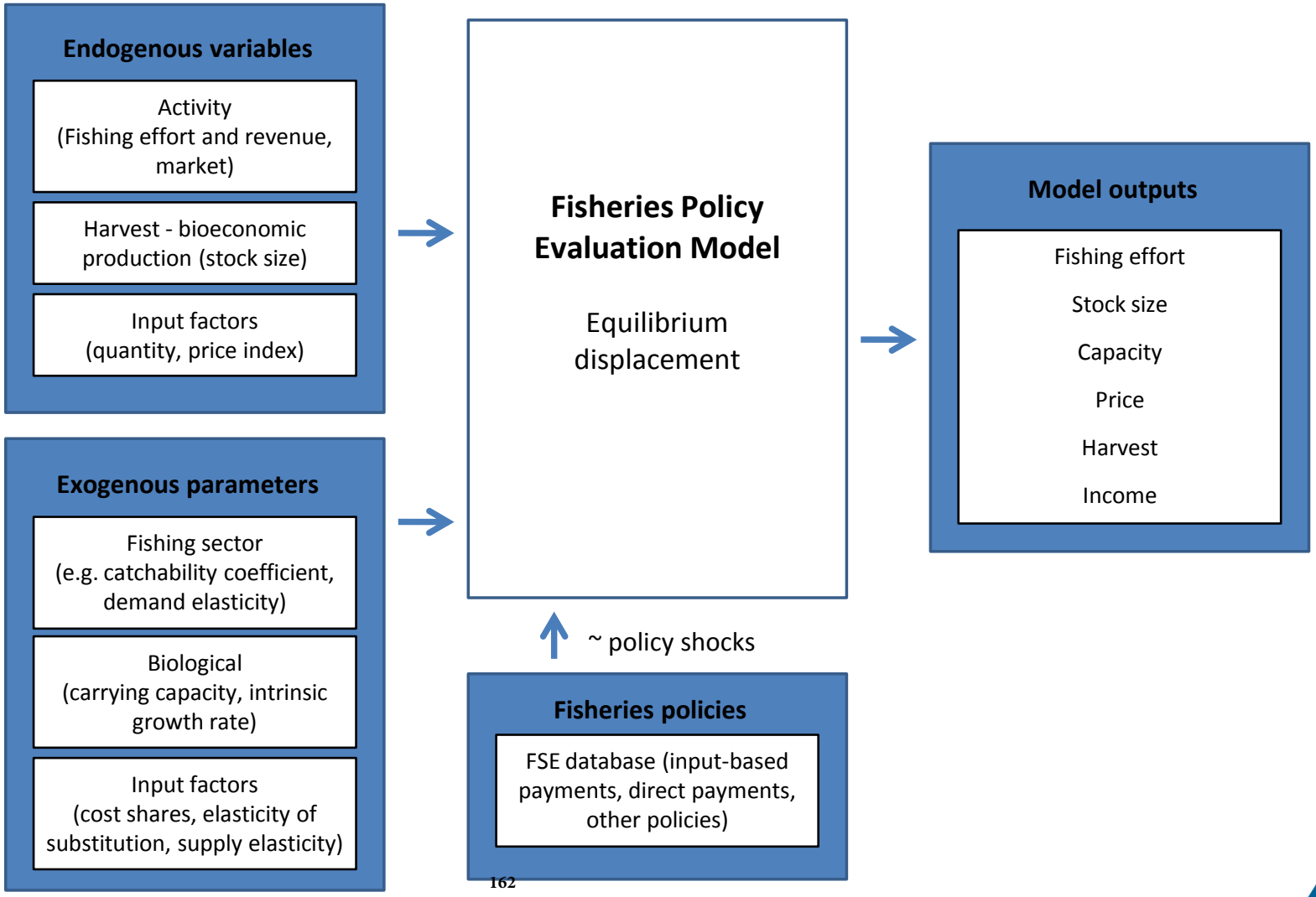
2. Assessment of the relative effects of alternative fisheries policy categories:
   – **Model development & description of initial modelling approach** [TAD/FI(2017)17]

A Fisheries Policy Evaluation Model

- **Structure:**
  - Based on a successful approach for assessing the impacts of support (PEM)
  - Stylized representation of effort, harvest and consumption (single species stock, single fishery)
  - Economic policy linked to fishery activities via **explicit input markets**

- Relative impact of experimental changes in policy categories can be assessed on four primary dimensions;
  - **Capacity, harvest, stock size and benefit to fishers**

The “Fisheries PEM” schematic



Going forward

- The model described here is still in its early stages
  - i.e. single species, single fishery, single 'fish' output
- Future development will determine the types of policy investigation the model is capable of
- **Advice is sought from delegates** on what their priorities are for the next steps of development:
  - E.g. how much focus should be dedicated to elaborating management measures vs. stock dynamics vs. increasing the number of stocks vs. adding production details?
  - **An expert meeting is foreseen in 2018** to review the model and the data and to gain advice on next steps.

ITEM 10
COMBATTING IUU FISHING

Antonia Leroy, Fisheries Policy Analyst, TAD/NRP
antonia.leroy@oecd.org

Data collection process

- ✓ **21 countries** (17 OECD countries) and participating economies have completed the questionnaire (Australia, Belgium, Canada, Czech Republic, Denmark, Estonia, Germany, Ireland, Italy, Japan, Latvia, Netherlands, New-Zealand, Norway, Sweden, Turkey, United States, Colombia, Lebanon, Libya, Chinese Taipei)

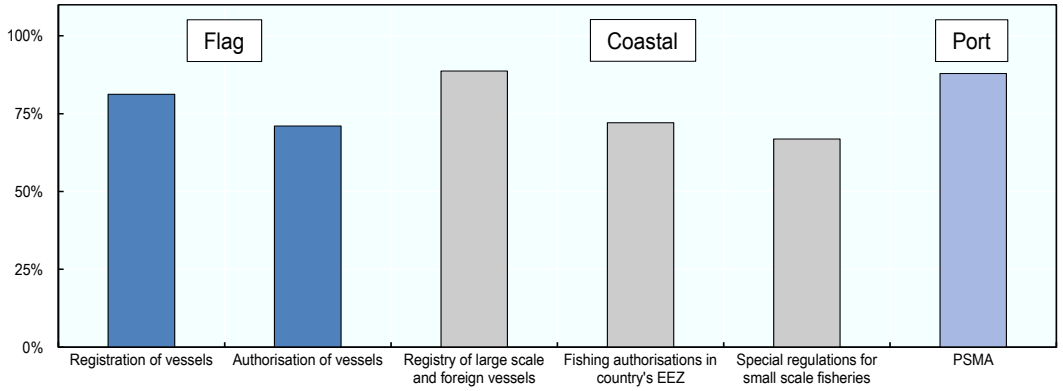
- ✓ The process of collecting data has been a successful exercise. **Many authorities have been exchanging information** with their counterparts in other ministries, developing an informal cooperation.

- ✓ Missing information
  - 10 countries have sent data where information are under process or still need to be complemented (Iceland, Korea, Montenegro, Albania, Tunisia, Thailand, Ivory Coast, Slovenia, Spain, Lithuania)
  - Not a lot of data received on enforcement proceedings

Illustration of expected results

Figure 1. Degree of implementation of identified best policies and practices related to state responsibilities

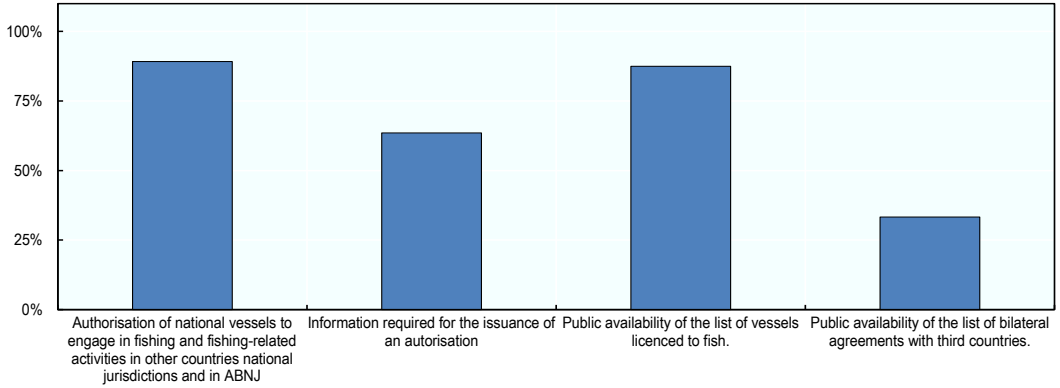
Illustration of possible infographic based on a very restricted sample of countries.



Note:
Country scores weighted using production volume (FAO, 2017[2]).
Source: OECD data collection on IUU fishing 2017.

Figure 2. Degree of implementation of identified best policies and practices related to the particular issue "authorisation of vessels"

Illustration of possible infographic based on a very restricted sample of countries.

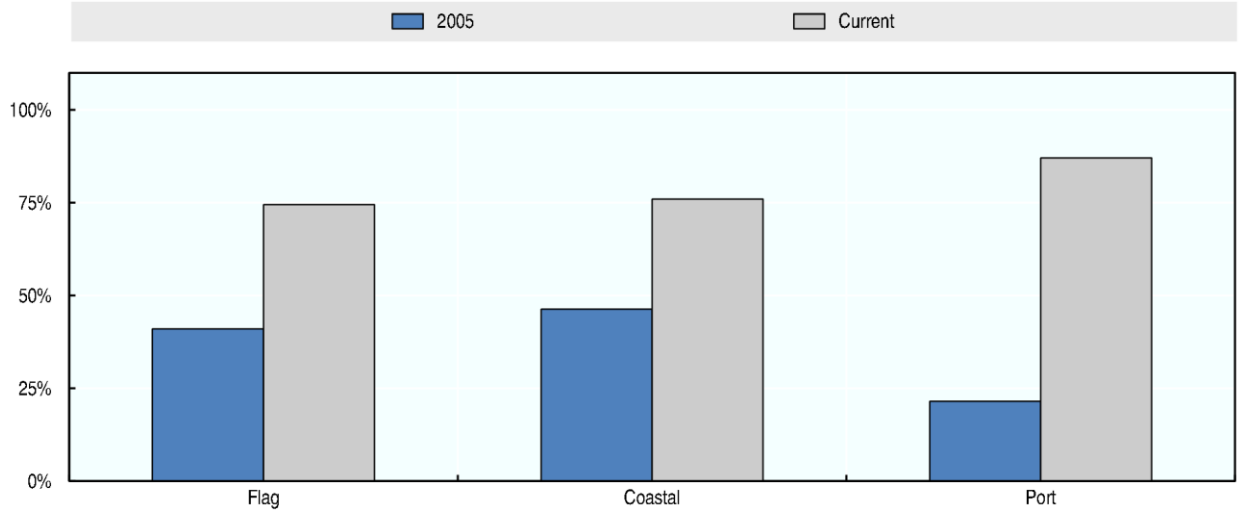


Note: Country scores weighted using production volume (FAO, 2017[2]).
Source: OECD data collection on IUU fishing 2017.

Illustration of expected results

Figure 1. Progress in implementation of identified best policies and practices related to state responsibilities since 2005

Illustration of possible infographic based on a very restricted sample of countries



Note: Country scores weighted using production volume (FAO, 2017[2]).

Source: OECD data collection on IUU fishing 2005 and 2017.

Best practices for co-operation

- Two key dimensions of RFMO activities in relation to IUU fishing will be analysed:
  - (i) measures related to the listing of IUU vessels in the framework of RFMOs' general decision-making process,
  - (ii) the processes related to compliance with and enforcement of international obligations including open access information on monitoring, surveillance and control (MSC).
- A consultation with RFMOs will be undertaken

THANK YOU

ITEM FOR DISCUSSION

Antonia Leroy, Fisheries Policy analyst, TAD/NRP
antonia.leroy@oecd.org

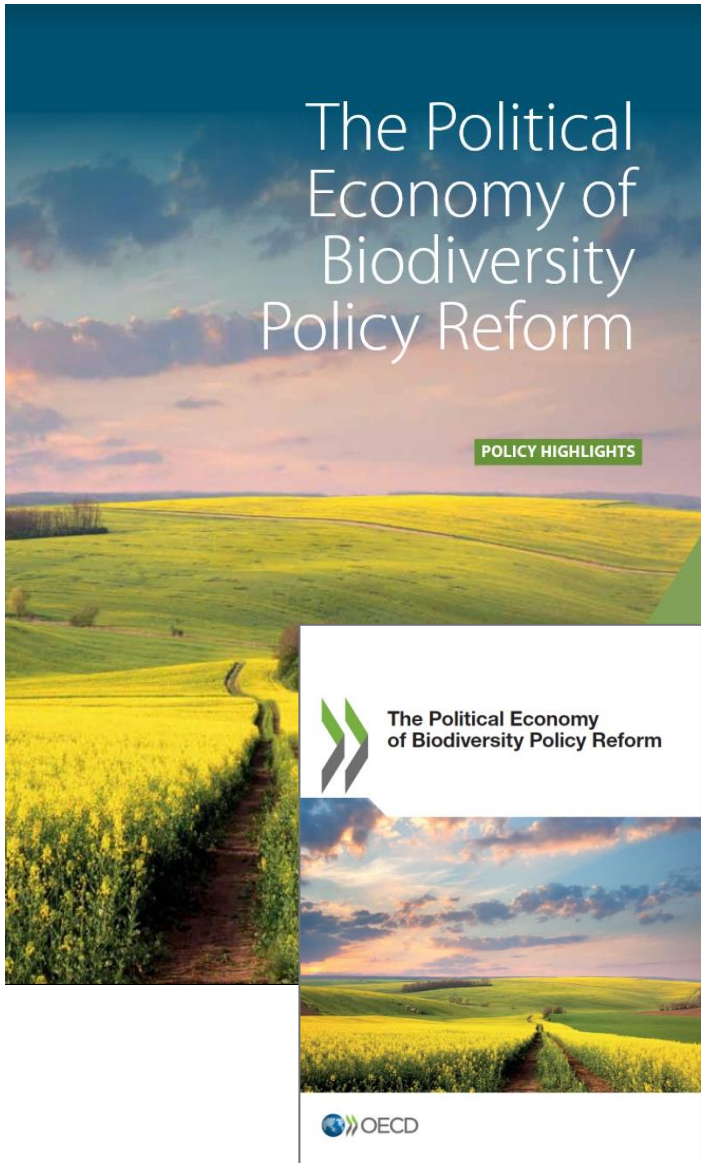
RELEVANT WORK FROM THE WPBWE

Katia Karousakis (ENV/CBW)
COFI meeting
16 November, 2017

Biodiversity: Recent publications

- The Political Economy of Biodiversity Policy Reform (April 2017 – online)

- Two marine/ocean case studies
  - EU payments to Mauritania and Guinea-Bissau to finance MPAs via conservation trust funds
  - ITQs for fisheries in Iceland



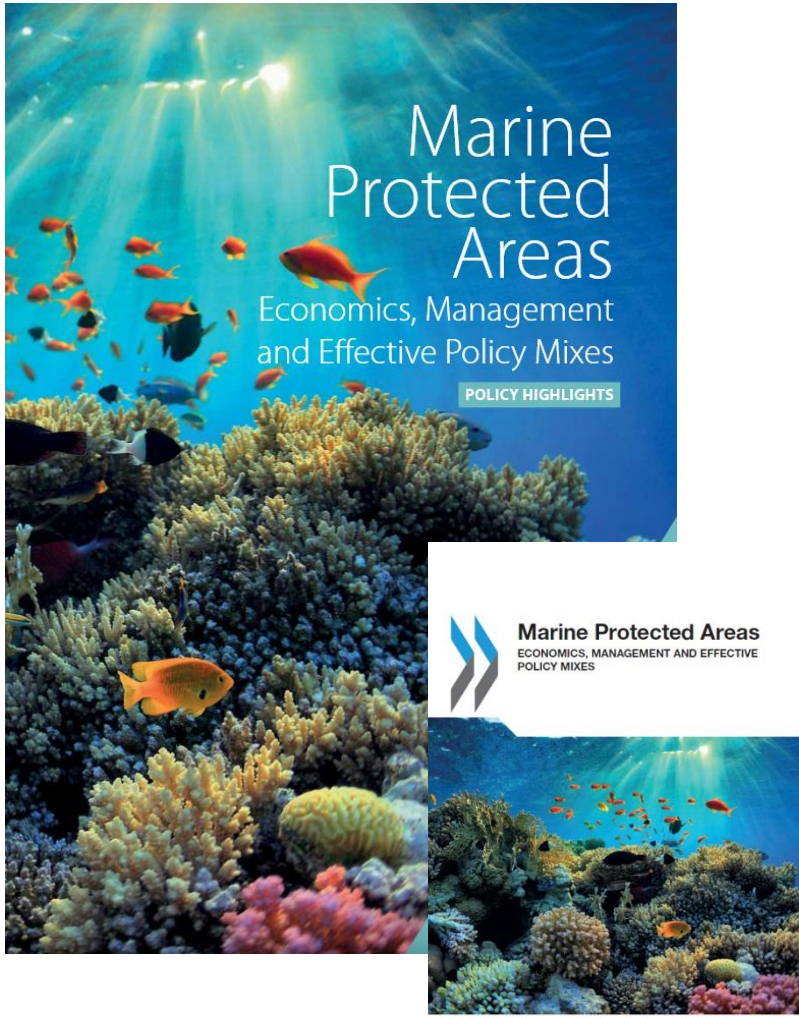
Biodiversity: Recent publications

Marine Protected Areas: Economics, Management and Effective Policy Mixes

(June 2017 - online)

- Launched at UN SDG 14 Oceans Conference (5-9 June 2017)

THE OCEAN CONFERENCE
UNITED NATIONS, NEW YORK, 5-9 JUNE 2017



OECD

On-going WPBWE work

- Impact evaluation and cost-effectiveness analysis of biodiversity policies: overview of methodologies and evidence across terrestrial and marine ecosystems [ENV/EPOC/WPBWE(2017)5/REV1]

- Mainstreaming biodiversity and development
  - with chapter on mainstreaming biodiversity in agriculture, forestry and fisheries [will be circulated for comments also to COFI]

Outcomes from recent EPOC and WPBWE meetings on the 2019-2020 programme of work for biodiversity

- Enhancing global and national measurability of the goals and targets under the post-2020 Strategic Plan for Biodiversity

- Guidance to identify and assess subsidies harmful to biodiversity at national level
  - Relevant to CBD Aichi Biodiversity Target 3

[ENV/EPOC(2017)10/ANN4]

Thank you

katia.karousakis@oecd.org

Organisation for Economic Co-operation and Development

TAD/FI/M(2017)2

For Official Use **English - Or. English**

TRADE AND AGRICULTURE DIRECTORATE
FISHERIES COMMITTEE

Summary records of the 120th Session of the Fisheries Committee

14-16 November 2017
OECD Conference Centre
Paris, France

The Fisheries Committee produced this summary record at the end of its 120th Session. Some additional text under Item 18—Reports from observers and Item 19—Reports from Members has been added.

Contact: Roger Martini (roger.martini@oecd.org

Day 1 – 14 November 2017

Item 1 Adoption of the Draft Agenda

The draft agenda was adopted with a change to introduce the Bureau designation and a correction on the COTEs for documents related to item 13 on Lithuanian accession to the Organisation.

Item 2 Statement by Ms. Rachel Bae, Senior Counsellor, Trade and Agriculture Directorate

The committee has gone through a period of reflection and taken steps in an effort to make its work more meaningful. This effort appears to be bringing positive results, for example, the conference on combatting tax crimes and other crimes related to fisheries attracted a good deal of interest. The work on informing trade-related negotiations on fisheries subsidies, which in a way was a vehicle for the FSE database has also attracted positive attention: the Secretariat has been invited to Geneva multiple times to discuss this work and we have been contacted by the rules negotiators involved in the WTO negotiators on fisheries subsides. This work was a meaningful contribution to an important initiative. The committee should continue striving in this same direction and the 2019-20 PWB discussion is an opportunity in this regard.

Item 3a: Information on publication timing constraints and on the communication strategy

The COFI was informed on the target release date, 27 November 2017, and the communication campaign to promote the Review of Fisheries after its publication.

Item 3b General survey

The Secretariat pointed out improvements and key messages from the general survey and delegates appreciated this work.

The COFI declassified the revised general survey subject to some requested changes. A revised version will be presented before the end of the meeting for final review. This version incorporates comments received before the meeting as well as some received during the meeting.

Item 3c: Country chapters

The Secretariat presented the new changes in the 2017 Review. Several countries suggested modifications. The presentation of the "targets and thresholds" indicator in EU countries has been moved from their infographic pages to the EU chapter of the Review.

Item 3d Reflections on the 2017 Review of Fisheries process – Data collection and overall process

The COFI was informed on 2018 data collection process, which will be adjusted to reduce the workload on the part of respondents. Delegates appreciated the improvement for future work.

The Secretariat presented reflections on the process, including the rationale for changes from past versions, achievements and obstacles. Delegates appreciated the improvements in the 2017

Review and pointed out that the COFI needs to invest in the Review of Fisheries as it is a flagship product of the Committee.

Item 4: Discussion of the Programme Implementation Review (PIR) results for 2015-16

Greg Christofani (EXD/PBF/MSD) explained the process behind the PIR report, the key messages that can be taken from it, and suggested how members may better take advantage of it.

Delegates asked questions about the process and indicated a willingness to participate more actively in future surveys.

Item 5: Preliminary discussion on the 2019-20 Programme of Work and Budget

The Committee engaged in a rich discussion with 15 delegations intervening with initial thoughts for future work. The suggestions proposed ranged from more work in the area of crimes related to fisheries to aquaculture licensing. The recurring themes included strengthening the FSE database; exploring work that may not be fisheries specific but impacting fisheries, specifically in the context of the Blue Economy; and innovation or technology. The majority of delegations acknowledged the important work on fisheries subsidies carried-out under this last PWB and suggested that the Committee watch closely the outcome of the WTO MC11 meeting as that could serve to impact a possible next phase of the project. Another important issue raised was communication; delegations felt that more thought on messaging including political messaging should be considered as each project moves forward. Delegates reaffirmed the importance of the Review of Fisheries in the work of COFI. Some delegations pointed out the importance of trade-related work. Some delegations mentioned leveraging the unique role of the OECD to support the implementation of the SDGs. The guiding role of the long-term strategy of the COFI with respect to the PWB was mentioned. The Secretariat thanked delegations for their contributions, informing them that the ideas would be taken into consideration for the revision of the orientation note (Christmas letter) that will be distributed before the end of the year. The Secretariat added that the Christmas note will request that delegations submit their written inputs early next year, which will then inform the draft PWB, which will be circulated before the May COFI meeting. The long-term strategy of the COFI will appear on the agenda of the 121st session to support the PWB discussion.

Day 2 – 15 November 2017

Item 6: Identifying reform pathways for sustainable fisheries management

The secretariat presented the advances in relation to this PWB item. An analytical framework was presented for discussion as well as a questionnaire for information. The COFI was also informed of the organisation of a workshop in May 2018.

Extensive comments were received from Delegations, which will feed future work of the Secretariat on this item, within the scope agreed on in the scoping phase.

Delegates noted the complexity of the questionnaire and the time required to complete it. They required clarification of some of the concepts used in the questionnaire. The need to provide

appropriate coverage of both input and output controls in the questionnaire was noted by the EU. Delegates are invited to reply to the information request that will be launched soon after the COFI meeting; identify respondents for the questionnaire both among fisheries authorities and among private sector and civil society stakeholders who may have taken an active part in reform over the past decade. The Delegates were also invited to suggest names and contacts of potential key speakers for the May workshop and communicate about this event when the invitations are sent out.

Item 8: Country study of fisheries and aquaculture policy in Viet Nam

The Secretariat updated the Committee on progress made in launching this project. The EU drew the attention of the COFI to the fact that on the 23rd of October Viet Nam has been notified of the possibility of being identified as a non-cooperating third country in fighting IUU fishing. The Secretariat took good note of this development and will try to ensure complementarity between its work, long term engagement between the Committee and the Government of Viet Nam and the reform process that might be initiated by Viet Nam in response to the recommendations of the EU.

The Committee will be updated again at the next COFI meeting and Delegates are invited to share contacts and documents which can feed the analysis under this project.

Item 9: Informing Trade-Negotiations

Delegates were provided with information on how the new FSE has been received and an update on model development. Advice was sought from delegations on priorities for the direction of model development and comments were provided in the room by several delegations. Delegates expressed support for the work and advised that the level of model detail must eventually be improved, especially with respect to multiple species and fleets and the characteristics of the management system.

Item 10: Combatting illegal, unreported or unregulated fishing

Delegates were provided with information on the progress made regarding the data collection process. Comments were provided by several delegations on the methodology and cooperation mechanisms for the on-going study. Delegates who have not completed the questionnaire are kindly requested to do so as soon as possible. A number of delegations inquired regarding how data will be presented, in particular whether it would be with respect to best practices or whether there would be a ranking system.

Item 11: Global Relations Strategy

Delegates expressed support for the Global Relations Strategy. The GRS will be open for a period of two weeks for changes in the list of invitees. A written procedure for approval of the Strategy will follow. It will be transmitted to Council via the External Relations Committee.

Item 12: Designation of the COFI Bureau for 2018

The Bureau for 2018 was designated. Six members were exceptionally designated for 2018. The members are:

- Leon Lomans (NLD) – Chair
- Geir Evensen (NOR) – Vice Chair

- An-Ho Lee (KOR) – Vice Chair
- Miguel Narvaez (MEX) – Vice Chair
- Wilhelmine Brown (AUS) – Vice Chair
- Greg Schneider (USA) – Vice Chair

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Item 13: Accession of Lithuania (confidential)

Item 14: Formal Opinion on accession of Lithuania (confidential)

Item 15: Preliminary discussion on the Accession Review of Costa Rica (confidential)

Item 17: Report on activities related to fisheries

Delegates were provided information on work undertaken at other directorates of the OECD related to fisheries. The session included talks by three guest speakers, Claire Jolly (STI), Katia Karousakis (ENV) and Jaco Tavenier (ENV).

Item 18: Report from observers

Reports were provided by Andres Couve from BIAC, Xavier Vincent from the World Bank, Stefania Vannuccini from FAO, Chinese Taipei, Argentina, Indonesia and the European Commission.

Chinese Taipei updated the Delegates on progress made since the last COFI meeting with regards to the 11 action plans to combat Illegal, Unreported, and Unregulated (IUU) by providing the following information:

- *Legal Framework: We continue to make revision on the implementing regulations to avoid possible inconsistencies and make necessary alternations.*
- *MCS Measures:*

- *Cross-Ministerial Task Force: The latest developments on the second half of 2017 are the relevant meetings. Recently, one of the major discussions is to establish mechanisms to prohibit fisheries products from countries under trade sanctions imposed by RFMOs.*
- *Designated foreign ports and inspections: Up to August, there are total of 32 designated foreign ports. The scheme in-place includes the inspection carried by on-site authorized inspector, missioned inspector, the independent third-party commissioned our authority and inspector of the port States.*
- *The Integrative Data System for Marine Fisheries-Currently, the 24/7 Fisheries Monitoring Center (FMC) staff can:*
    - *Monitor the report of E-logbook of vessel operating in area beyond national jurisdiction and fisheries management.*
    - *Monitor Real-time catch data to prevent from exceeding allocated data.*
    - *Before landing and transshipment, the officers can verify advance notice of landing and transshipment by comparing to e-logbook data.*

    - *Combine with Vessel Monitoring System (VMS) data and verify catches to be caught within authorized area.*
    - *Use the system to display history trajectory of fishing vessel suspected of possible infringements.*
- *Traceability System: Up to August, approved exporters that have periodically declared the information on the purchased, sold, and stocked catches of fisheries products in accordance with our regulations have increased, evidently, we can control not only the basic information and the operating conditions of the approved exporters but also the purchase sources and the sale flows of catches or fisheries products, so as to further endure the traceability of catches of fisheries products. And we continue to strengthen the traceability of fisheries products for preventing IUU products from entering markets.*
- *International Cooperation: To promote international cooperation, in addition to the 21 countries, Vanuatu, British Falkland Islands and Madagascar are the three countries that the cooperation mechanism has been recently established.*

Argentina provided the following intervention:

> *Argentina is strongly committed to achieving positive results at MC11 in Buenos Aires next December, and we look forward to continuing the cooperation with OECD COFI Members towards this end. In the current context of doubts about globalization, it is fundamental to get an outcome at MC11 that strengthens the multilateral trading system -with the WTO as its backbone-. In this sense, we believe that the WTO can continue to bring outcomes that can benefit everyone, taking into consideration that trade is an engine of inclusive growth, development and job creation.*
>
> *In relation to the specific issues relevant for OECD COFI discussions, we consider of importance to advance in Buenos Aires outcomes towards the prohibition of fisheries subsidies which contribute to overcapacity and overfishing and to illegal, unreported and unregulated fishing, in line with 2030 Agenda and its Sustainable Development Goal (SDG) 14.6.*
>
> *We envisage that fast progress has been made during the last weeks in the negotiations of the issue in Geneva, and that MC11 represents the chance for the WTO to make a substantive contribution to the preservation of marine resources, towards the achievement of sustainable development. In this respect, ambitious and effective WTO disciplines for the prohibition and elimination of subsidies that are depleting fisheries worldwide will represent substantial benefits for developing countries, taking into consideration that a substantive part of the population of many developing and least developed countries depend on marine resources for their livelihood.*

Item 19: Report from Members

Reports were provided by Norway, the Netherlands, Korea, and the United States,

The United States reported that its Seafood Import Monitoring Program (SIMP), which was described in detail at the 119th Session of COFI, would come into force on 1 January 2018.

Korea announced the progress of the World Fisheries University establishment, which launched an 18 month long pilot programme in September this year.

1.1. Dates of the Next COFI meetings:

- 2-4 May 2018
- 19-21 November 2018