



BACKGROUND BRIEFING NOTE ON DEVELOPMENT FINANCING TO THE FISHERIES SECTOR

OVERVIEW

- A total of US\$ 2.59 billion in Official Development Assistance (ODA) was reported disbursed in fisheries' support to the OECD Creditor Reporting System (CRS) over the period 2010–2017. A further US\$ 1.01 billion in ODA was committed over the same period. Almost three-quarters (74.5%) of ODA support was provided in grant form.
- Some 11,882 entries were identified in the OECD CRS reporting codes for fisheries support activities over the period 2010-2017. A further 1,705 entries referencing "fish" were registered in other reporting categories (e.g. environmental protection) over the same period, suggesting that the figure for total support (US2.59 billion) could be higher.
- Bilateral donors provided US\$ 1.7 billion in ODA (65%), with Inter-governmental organizations financing the remaining US\$ 0.9 billion (35%). Together, the top ten donors (Japan, World Bank IDA, European Union, Norway, United States, FAO, UAE, Australia, Spain and New Zealand) provided approximately 81% of total ODA to fisheries.
- Reporting to the OECD CRS is calculated both for a general category (fisheries) and broken down into five purpose sub-codes. Most ODA support (US\$ 1.76 billion) was provided for the fishery development purpose code (68%) between 2010-2017. Fishing policy and administrative management attracted US\$ 0.54 billion in support (21%). These two categories received 89% of all ODA fisheries support. Financing in three additional purpose codes: fishery research (2%), fishery services (7%) and fishery education/training (2%) totalled US\$ 285 million. No distinction is made in CRS reporting codes between financing for marine wild capture fisheries or aquaculture.
- A total of 38 projects specifically mentioned the control of Illegal, Unreported and Unregulated (IUU) fishing in the description of funded activities entered in the CRS database. This project number increased to 454 when the term sustainable fisheries management was included – totalling some 13% of the total support. Control of IUU is not specified as an item in OECD reporting guidance. As such, the number of project activities addressing IUU fishing is likely to be higher.
- Morocco received most ODA support (totalling US\$ 278 million), followed by Mozambique (US\$ 95 million) and Vietnam (US\$ 84 million) over the period 2010-2017. African countries have been the main recipients of fisheries ODA financing, receiving 46.3% of support, with Oceania accounting for a further US\$ 404 million in financing. Least Developed Countries (LDCs) received 24% (US\$ 623 million) of total disbursements.
- Outside of the ODA category, a further US\$ 0.46 billion was recorded in fisheries support by the CRS in non-concessional (loan) financing to ten middle income countries.

INTRODUCTION

The following note gives an overview of development financing to the fisheries sector. It is based on information harvested from various sources. The main source is data reported to the OECD'S Creditor Reporting System (CRS). Information published on the internet by WTO Members and Observers about their fisheries support programmes was also consulted. The note surveys official development assistance (ODA) and other official flows (OOF) support over the period 2010-2017.¹ All figures are nominated in 2017 current prices.

The briefing note is organized as follows: Section 1 gives an overview of how much development finance is being offered to the fisheries sector and for what purpose; Section 2 summarises who has provided the support and gives information about the programmes of the top 10 donors; Section 3 elaborates on who has received support; and Section 4 discusses some methodological issues arising in compiling this briefing.

The briefing note has been prepared for the Aid for Trade Global Review 2019, and more specifically for the plenary session on "Economic diversification and the blue economy – what role for a WTO Fisheries Subsidies Agreement?"

SECTION 1: HOW MUCH SUPPORT WAS GIVEN OVER THE PERIOD 2010-2017 AND FOR WHAT PURPOSE?

Overview

The OECD CRS collates data on Official Development Assistance (ODA) and Other Official Flows (OOF – or non-concessional flows as termed herein) based on entries made by some 50 reporting governments and organizations. Support to fisheries is reported under both a general heading (fishing) and further broken into five reporting categories:

- **Fishery development** (31320) covers: exploitation and utilisation of fisheries; fish stock protection; aquaculture; integrated fishery projects;
- **Fishery education/training** (31381)
- **Fishery research** (31382) covers: pilot fish culture; marine/freshwater biological research.
- **Fishery services** (31391) covers: fishing harbours; fish markets; fishery transport and cold storage; and
- **Fishing policies and administrative management** (31310) covers: fishing sector policy, planning and programmes; institution capacity building and advice; ocean and coastal fishing; marine and freshwater fish surveys and prospecting; fishing boats/equipment and unspecified fishing activities.

No distinction is made in reporting between financing made for marine wild capture fisheries or aquaculture. Furthermore, while many programmes or projects include activities aiming at the control of overfished stocks or Illegal, Unreported and Unregulated (IUU) fishing, this is not specifically covered by reporting guidance in OECD reporting codes.

How much support is given?

A total of **US\$ 2.59 billion was reported as disbursed for fisheries in ODA** support over the period 2010–2017. An additional US\$ 1.01 billion was also committed in ODA support over the same

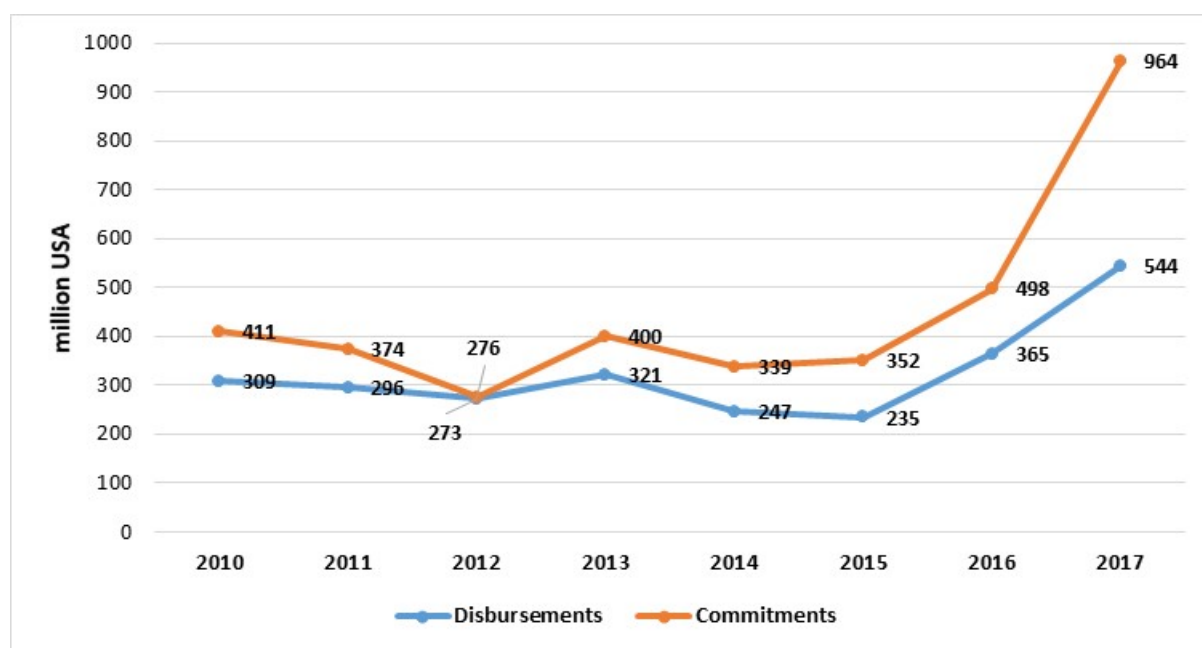
¹ OECD defines ODA as government aid designed to promote the economic development and welfare of developing countries. Loans and credits for military purposes are excluded. ODA definition: <https://data.oecd.org/oda/net-oda.htm>

OECD defines OOF as official sector transactions that do not meet official development assistance (ODA) criteria. OOF include: grants to developing countries for representational or essentially commercial purposes; official bilateral transactions intended to promote development but having a grant element of less than 25%; and, official bilateral transactions, whatever their grant element, that are primarily export-facilitating in purpose. OOF definition: <https://data.oecd.org/df/other-official-flows-oof.htm>

period.² An amount of US\$ 0.46 billion in non-concessional finance was also disbursed and a further of US\$ 966 million committed.³

Figure one below gives an overview of ODA to fisheries sector over the period 2010–2017.

Figure 1: Commitments and disbursements of ODA financing for fisheries 2010-2017



Source: OECD Creditor Reporting System

Since 2016, the level of annual **ODA disbursements** reported has increased. Support averaged US\$ 292.6 million between 2010-2012 and US\$ 267.6 million between 2013-2015. This jumped to US\$ 365 million in 2016 and still higher to US\$ 544 million in 2017. Looking over the period 2010 to 2017, ODA disbursements increased by 76%.

ODA commitments to the fisheries sector show an even more pronounced upward trend since 2016. Commitments averaged US\$ 353.6 million between 2010-2012 and US\$ 363.6 million between 2013-2015. This figure grew to US\$ 498 million in 2016 and jumped to US\$ 964 million in 2017. Between 2010 to 2017, ODA commitments increased by 134.5%.⁴

Several large projects in 2017 explain this increase. The largest project reported was a US\$ 133.7 million commitment by Japan to the Oceania region, with the focus on promotion of overseas fisheries. Another large project was committed by United Arab Emirates to Morocco for building a new fishing port in Casablanca, with financing totalling US\$ 80 million. A project financed by Norway reported to the OECD to improve utilization of the goods and services marine ecosystems, was also financed with funding recorded as totalling US\$ 73 million. Box 1 below highlights a recent funding announcement made by the Asian Development Bank.

² US\$ 3.6 billion was committed in ODA over the period 2010-2017, from this US\$ 2.59 billion was disbursed, with the remainder equalling US\$ 1.01 billion.

³ Concessional: (i.e. grants and soft loans) administered with the promotion of the economic development and welfare of developing countries as the main objective.

Non-concessional: Other official flows, officially supported export credits

⁴ Commitments run ahead of disbursements in all categories of ODA. While a commitment is entered in full in the year that a financing agreement is inked, disbursements may be spread over several years. The OECD defines commitments as a firm obligation, expressed in writing and backed by the necessary funds, undertaken by an official donor to provide specified assistance to a recipient country or a multilateral organisation. Definition of commitment available at: <https://stats.oecd.org/glossary/detail.asp?ID=385>

Box 1: ADB Action Plan for Healthy Oceans and Sustainable Blue Economies

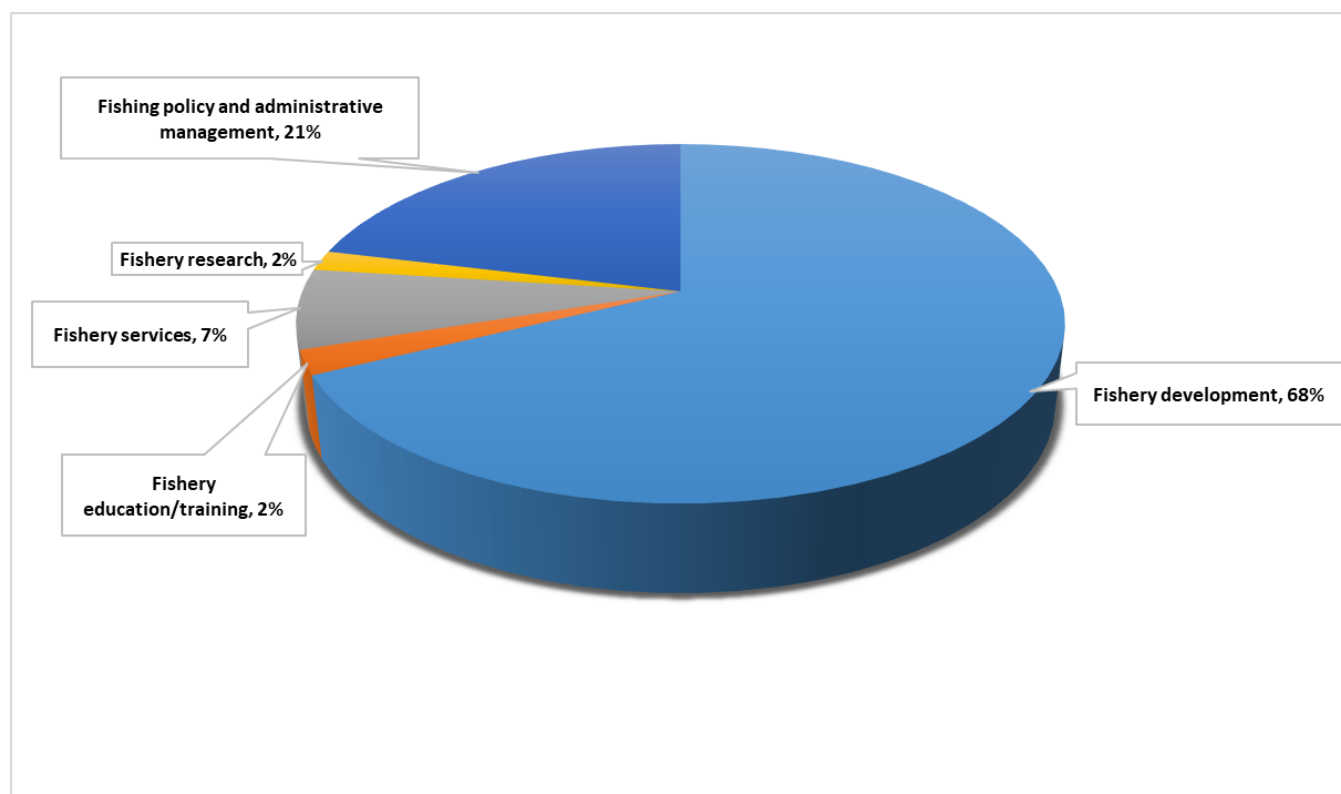
At the Asian Development Bank's 52nd Annual Meeting in Fiji on 2 May 2019, an announcement was made of an [Action Plan for Healthy Oceans and Sustainable Blue Economies](#). The Action Plan will expand financing and technical assistance for ocean health and marine economy projects to \$5 billion in the period 2019 to 2024, including co-financing from partners. It will focus on four areas: creating inclusive livelihoods and business opportunities in sustainable tourism and fisheries; protecting and restoring coastal and marine ecosystems and key rivers; reducing land-based sources of marine pollution, including plastics, wastewater, and agricultural runoff; and improving sustainability in port and coastal infrastructure development.

Source: Asian Development Bank

For what purpose is support given?

During the 2010-2017 period, most ODA support (US\$ 1.76 billion) was provided for fishery development (68%). Fishing policy and administrative management attracted US\$ 544 million in support or 21% of the total. These two categories received 89% of all ODA support. Financing for fishery research (2%), fishery services (7%) and fishery education/training (2%) totalled 11% or US\$ 285 million. Figure 2 provides a graphic representation in a pie chart.

Figure 2: ODA support for fisheries by purpose, 2010-2017



Source: OECD Creditor Reporting System

In addition to the five categories in which the support is coded by OECD reporters, the descriptions given in the database cite a broad range of other purposes, including: coastal disaster risk reduction, disaster recovery, coastal resources for sustainable development, fish market construction, expansion of fishing ports, increasing contributions to fisheries to reduce poverty, improve living conditions and achieve sustainable development, strengthen institutional capacity to enhance governance in the fishery sector, improve fishing equipment etc. Non-concessional financing cited a similarly diverse list of purposes, including: inclusive green growth, defence

cooperation activities for patrol boats, regional plan to promote responsible fishing practices, monitoring coastal environments to sustain coastal food resources and Illegal, Unreported and Unregulated (IUU) fishing.

Some 38 projects specifically cite controlling IUU fishing in the accompanying description of project activities, with a further ten projects referring to overfishing. A total of 454 projects cite sustainable fisheries management totalling some 13% of the total support. Important to note is that reporting on project activities is not uniform. Some entries contain detailed descriptions of project activities. Some others contain only minimal information. Further, more in-depth research would be needed to arrive at an accurate figure of projects or programmes specifically addressing IUU or overfishing.

Looking at project level data, both for ODA and non-concessional financing, a total of 11,882 entries are reported over the period 2010-2017. The median size of project was US\$ 37,000 and the average US\$ 380,000. The ten largest projects funded by three donors (Japan, United Arab Emirates and the United States) accounted for 21.4% of all support disbursed. Table 1 provides further details.

Table 1: Ten largest ODA projects reported in the fisheries sector

Project title, short description and beneficiary	Donor	Amount In US\$ millions
Project loans for promotion of overseas fishery, Oceania region	Japan	134
Project loans for promotion of overseas fishery, Africa region	Japan	125
The new Fishing Port in Casablanca, Morocco	United Arab Emirates	74
The new Fishing Port in Tangier, Morocco	United Arab Emirates	71
Fish Landing Sites and Port Facilities Activity, Morocco	United States	42
Project loans for promotion of overseas fishery, Argentina	Japan	25
Wholesale Fish Markets Activity, Morocco	United States	24
Fish Landing Sites and Port Facilities Activity	United States	23.5
South Pacific Forum Fisheries Annual Contribution: South Pacific Forum Fisheries, Oceania region	United States	20.2
Promotion of overseas fishery, Micronesia region	Japan	17

Source: OECD Creditor Reporting System

Non-concessional financing totalling US\$ 465 million was reported to the fisheries sector for 2010-2017. Non-concessional flows benefited middle-income countries, in particular non-International Development Association eligible countries. (The ten largest non-concessional financing projects went to three countries (Morocco, Philippines and Peru) and accounted for 66% of all support. All these projects were financed by the World Bank Group. The projects focused on green growth, fishing policy and administrative development, rural development and fishery and environmental policies.

SECTION 2: WHO PROVIDES SUPPORT FOR FISHERIES?

A total of 49 donors (30 bilateral and 19 international organizations) reported fisheries sector support to the OECD CRS. Three-quarters (74.5%) of support was provided in grant form. Concessional loans accounted for 25.5% of ODA financing. The top ten donors provided 81% of the total ODA support (US\$ 2.1 billion). Table 2 provides more details on support by donor.

Table 2: ODA support by donor, 2010-2017 in US\$ millions

Bilateral donors		Inter-governmental organizations	
Name of the donor	US\$ in million	Name of the donor	US\$ in million
Japan	726.9	World Bank Group	257.6
Norway	182.9	EU	234.2
United States	181.1	Food and Agriculture Organisation	166.4
United Arab Emirates	146.4	Global Environment Facility	53.9
Australia	68.3	African Development Fund	48.4
Spain	66.2	Asian Development Bank	29.3
New Zealand	57.7	Arab Bank for Economic Development in Africa	15.2
Korea	52.1	Nordic Development Fund	10.5
France	41.0	OPEC Fund for International Development	9.4
Iceland	34.1	United Nations Industrial Development Organization	5.7
Germany	34.0	United Nations Development Programme	1.5
Denmark	32.0	Inter-American Development Bank	0.9
Sweden	25.7	International Fund for Agricultural Development	0.9
Canada	24.4	Adaptation Fund	0.8
Belgium	24.1	Arab Fund	0.6
Italy	19.6	World Trade Organization	0.6
United Kingdom	17.0	African Development Bank	0.2
Finland	9.1	International Labour Organisation	0.2
Netherlands	5.8	Climate Investment Funds	0.1
Switzerland	3.8	Islamic Development Bank	0.01
Ireland	0.7		
Turkey	0.6		
Austria	0.5		
Luxembourg	0.4		
Kuwait	0.3		
Estonia	0.2		
Slovak Republic	0.1		
Portugal	0.1		
Poland	0.1		
Azerbaijan	0.02		

Source: OECD Creditor Reporting System

The policy frameworks, programmes and projects of the top ten donors are briefly outlined below, and include hyperlinks to relevant webpages. Support to the fisheries sector is programmed as part of broader development policy frameworks. Donors (both bilateral and multilateral) use established national or regional dialogues with partner countries to align their support to local development priorities, frequently on the basis of multi-annual country or regional strategies. Policy statements or development policies help guide the areas in which bilateral donors or international organizations offer support. A number of donors referenced below have policy positions or statements on fisheries support and/or operate dedicated financing windows offering support to this sector.

JAPAN

Japan signed a Joint Statement against IUU fishing with the EU in 2012. Both parties agreed to work towards encouraging adoption of the Port State Measures Agreement at a global and regional level; improve and expand multilateral catch documentation and certification requirements; and strengthen bilateral cooperation in the global fight against IUU fishing at the technical, operational

and political levels.⁵ Japan is working to help developing countries effectively preserve and manage fisheries resources and ecosystems, while ensuring social objectives such as sustainable development and poverty reduction are met.

The Japan International Cooperation Agency (JICA) funds activities in support of (i) fisheries resource management and ecosystem conservation; (ii) aquaculture development; and (iii) development of the fishery value chain. Japan also works closely with governments to formulate long-term policies for sustainable fishing. Further information on Japan's fisheries support is available at: https://www.jica.go.jp/english/our_work/thematic_issues/fisheries/overview.html .

EUROPEAN UNION

In 2010, the EU adopted 'zero tolerance' policy towards IUU fishing, by way of EC Regulation No. 1005/2008 to establish a community system to prevent, deter and eliminate IUU fishing. The legal framework seeks to control access to the market of seafood products; maintain a network for exchange of information between the Commission and the EU member states; and facilitate extensive cooperation with non-EU countries globally.⁶

The European Commission provides assistance to promote sustainable fisheries management, including as part of broader programming efforts for the environment and specific support for the implementation of IUU regulations. Further details are available here: https://ec.europa.eu/europeaid/sectors/environment_en. In addition, the Commission has signed 'Sustainable Fisheries Partnership Agreements' with third countries that provide for support measures, such as regional fisheries surveillance, vessel monitoring systems, etc. Further details are available here: https://ec.europa.eu/fisheries/cfp/international/agreements_en

With the African, Caribbean and Pacific group of countries, the EU operates a dedicated ACP FISH Programme. A second 4.5-year programme cycle is currently under way that aims to improve fisheries management. Specific IUU control activities include a five-year project for Western Africa called "Improved Regional Fisheries Governance in Western Africa", to fight IUU fishing activities. Further information is available here: https://ec.europa.eu/europeaid/projects/improved-regional-fisheries-governance-western-africa-pescao-0_en

EU member states are also engaged in fisheries support. Spain, for example, signed a Scientific and Technical Cooperation Agreement with Caricom in 1999, followed by an Addendum to the Agreement in 2011 which set up a CARICOM-Spain Joint Fund.⁷ Through this arrangement, Spain has implemented a Regional Cooperation Programme with the Caribbean Community that also seeks to develop the fisheries sector as a means of food security.⁸

UNITED STATES

The United States has instituted measures to curb IUU fishing. The Moratorium Protection Act directs the National Marine Fisheries Service, an office of the National Oceanic and Atmospheric Administration (NOAA) within the Department of Commerce, to report to Congress on its findings and analyses relating to foreign IUU fishing activities and bycatch of protected species. In 2014, a federal government Task Force on Combatting IUU Fishing and Seafood Fraud was established and an Action Plan for implementing the Task Force recommendation to combat IUU fishing and seafood fraud was published.⁹

⁵ 'Signature of a Joint Statement against Illegal, Unregulated and Unreported fishing', The Mission of Japan to the European Union, 10 July 2012 < <https://www.eu.emb-japan.go.jp/Fishing%20Agreement%202012.html> >

⁶ European Commission, 'The EU and FAO closing the door to illegal fish, Maritime Affairs and Fisheries', June 2016 < https://ec.europa.eu/dgs/maritimeaffairs_fisheries/magazine/en/policy/eu-and-fao-closing-door-illegal-fish-0 >

⁷ 15 years of regional cooperation with CARICOM: 1999 – 2014, Agency for International Cooperation – Spain, 2014 http://www.aecid.es/Centro-Documentacion/Documentos/Divulgaci%C3%B3n/folleto_CARICOM_v4%20ONLINE.pdf

⁸ Press Release - CARICOM – SPAIN Joint Commission Successful, CARICOM, 20 October 2006 <https://caricom.org/communications/view/caricom-spain-joint-commission-successful>

⁹ NOAA Fisheries, Presidential Task Force on Combating IUU Fishing and Seafood Fraud – Action Plan for Implementing the Task Force Recommendations, NOAA Fisheries, 2015 https://www.iuufishing.noaa.gov/Portals/33/noaa_taskforce_report_final.pdf

The NOAA provides support to domestic and international entities in the form of grants and cooperative agreements for special projects and programs associated with their strategic plan and mission goals. A list of grantees that have been funded since 2015 can be accessed at: <https://www.fisheries.noaa.gov/foreign/international-affairs/fisheries-international-cooperation-projects>.

The United States Agency for International Development also provides support. Among the programmes it operates is the Oceans and Fisheries Partnership <https://www.seafdec-oceanspartnership.org/> in the Asia-Pacific region. USAID has published a guide for its staff and partners on how to design programs to reform capture fisheries and aquaculture sectors to ensure sound and effective development, environmental sustainability, economic profitability, and social responsibility. The guide can be accessed here: <https://www.usaid.gov/sites/default/files/documents/1865/FishAquaGuide14Jun13Final.pdf>

NORWAY

Norway's Fish for Development programme (FfD) was launched in 2015 to coordinate all projects supported by Norway in the field of fisheries and aquaculture. The programme focuses on strengthening institutional capacity and developing resource management systems, including new fisheries legislation and measure to combat IUU fishing and fisheries-related crime. More information is available here: <https://norad.no/en/front/thematic-areas/climate-change-and-environment/fish-for-development>

The EAF Nansen Programme assists coastal developing countries to assess and sustainably manage their fisheries resources. The Norwegian-owned research vessel, Dr. Fridtjof Nansen, operated by the Institute of Marine Research, conducts research cruises. The vessel is an important platform for researchers and technicians to collaborate, while enabling data on environment and fisheries to help national researchers and authorities and building competence of countries to operate national research vessels. The Food and Agriculture Organisation (FAO) is a partner of the Programme and also implements the Port States Measures Agreement with support from Norway.¹⁰ Norway also funds implementation by facilitating FAO's technical assistance and capacity building initiatives; and is providing funding support to World Fish, among others.¹¹

AUSTRALIA

In February 2015, Australia agreed a 'Strategy for Australia's aid investments in agriculture, fisheries and water' in order to 'promote prosperity, reduce poverty and enhance stability' through contributions to private sector development and human development.¹² Australia's Foreign Policy White Paper released in 2017 highlighted the importance of improving management of agriculture, fisheries and water in an era of accelerating global resource demand, geostrategic competition and climate change. Further details can be found here: <https://dfat.gov.au/about-us/publications/Documents/strategy-for-australias-aid-investments-in-agriculture-fisheries-and-water.pdf>

Through the Department for Foreign Affairs and Trade, the Australian government promotes sustainable partnerships to strengthen fisheries management and ocean governance. Specific focus is placed on engagement with regional fisheries bodies within the Pacific region, namely the Forum Fisheries Agency and Secretariat of the Pacific Community's Fisheries, Aquaculture and Marine Ecosystems Division, and deepening engagement in South East Asia and Indian Ocean Rim countries. Australia also provides support through the Australian Centre for International Agricultural Research (ACIAR) for community-based fisheries management and aquaculture assistance, and supports Pacific island countries to address illegal, unreported and unregulated fishing.

¹⁰ NORAD, 'An Ocean of Opportunities – Norway's Fish for Development programme', 2018 <https://norad.no/om-bistand/publikasjon/2018/an-ocean-of-opportunities-norways-fish-for-development-programme/>

¹¹ Refer - NORAD, 'An Ocean of Opportunities – Norway's Fish for Development programme', 2018, P 55-56 <https://norad.no/om-bistand/publikasjon/2018/an-ocean-of-opportunities-norways-fish-for-development-programme/>

¹² Refer details of the Strategy for Australia's aid investments in agriculture, fisheries and water, 27 Feb 2015 <https://dfat.gov.au/about-us/publications/Pages/strategy-for-australias-aid-investments-in-agriculture-fisheries-and-water.aspx>

NEW ZEALAND

New Zealand is active in promoting sustainable management of fisheries resources. For instance, it was a founding member of the Commission for the Conservation of Southern Bluefin Tuna and applies fishing quotas for stocks management. New Zealand also engages through regional platforms, such as through membership in the Western and Central Pacific Fisheries Commission, whose main focus is sustainable management of tuna fisheries. New Zealand also contributes to the South Pacific Regional Fisheries Management Organisation, responsible for management of non-highly migratory fish stocks in the South Pacific Ocean. Further information is available here: <https://www.mfat.govt.nz/en/environment/oceans/international-fisheries-management/>

In addition to country-focused assistance, New Zealand also support regional organisations such as Secretariat of the Pacific Community and the Pacific Islands Forum Fisheries Agency (FFA).¹³ More recently, in June 2018, the New Zealand Ministry of Foreign Affairs and Trade (MFAT) committed NZD \$4.9 million to the FFA to enhance tuna fisheries management by establishing catch documentation schemes for its members over the next five years.¹⁴ Through this initiative, member states will be able to access high value export markets, while tackling IUU fishing by improving traceability of fish and integrating monitoring and control systems on a national and regional level.¹⁵

UNITED ARAB EMIRATES

The United Arab Emirates Ministry of Foreign Affairs and International Co-operation launched a five-year strategy for the country's foreign aid for the period 2017-2021. More information is available here: <https://uaecabinet.ae/en/details/news/uae-launches-5-year-foreign-aid-strategy> As part of these development cooperation efforts, the UAE offers support in the area of fisheries, including training activities such as capacity building workshops, and upgrading infrastructure. One example is a project implemented jointly with the Abu Dhabi Fund for Development that developed two fishing ports in Morocco. The goals were to develop and rehabilitate existing infrastructure to improve working conditions and create more job opportunities in the fishing sector.¹⁶

In addition to the efforts to develop national fisheries sectors, the UAE also entered into a partnership with the FAO in March 2016, titled 'FAO – United Arab Emirates Agreement 2016 -2020'. This Agreement builds on its support for operations of the FAO Sub-regional Office for the Gulf Cooperation States and Yemen to engage in efforts to improve agriculture and fisheries-based livelihoods and strengthen sustainability of these sectors in Near East and North Africa.

UNITED NATIONS FOOD AND AGRICULTURE ORGANISATION

The United Nations Food and Agriculture Organization (FAO) Committee on Fisheries and related sub-committee on Fish Trade and Aquaculture play a leading role in international fisheries policy. The FAO was responsible for implementing the Code of Conduct for Responsible Fisheries and Ecosystem Approach to Fisheries,¹⁷ International Plan of Action to Prevent, Deter and Eliminate IUU Fishing¹⁸, and more recently, the Port State and Flag State Measures Agreement to prevent, deter and eliminate IUU fishing (PSMA).¹⁹

¹³ The FFA comprises of 17 members from the Pacific islands and works towards strengthening national capacity and regional solidarity to manage, control and develop tuna fisheries. It functions as an advisory body providing expertise, technical assistance and other support to members making sovereign decisions on tuna resources and participate in regional decision making on tuna management.

¹⁴ Press Release: New Zealand commits NZD 4.9 million to help stop illegal, unregulated and unreported fishing in the Pacific, Pacific Islands Forum Fisheries Agency (FFA), June 2018 <https://www.ffa.int/node/2082>

¹⁵ Press Release: New Zealand commits NZD 4.9 million to help stop illegal, unregulated and unreported fishing in the Pacific, Pacific Islands Forum Fisheries Agency (FFA), June 2018 <https://www.ffa.int/node/2082>

¹⁶ Abu Dhabi Fund for Development, Annual Report 2017 < <https://www.adfd.ae/Lists/PublicationsDocuments/ADFD-ANNUAL-REPORT-2017-En-web.pdf>>

¹⁷ FAO, Code of Conduct for Responsible Fisheries 1995 < <http://www.fao.org/fishery/topic/16034/en>>

¹⁸ FAO, International Plan of Action to Prevent, Deter and Eliminate Illegal, Unreported and Unregulated Fishing, 2001 < <http://www.fao.org/3/a-y1224e.pdf>>

¹⁹ FAO, Agreement on Port State Measures to Prevent, Deter and Eliminate Illegal, Unreported and Unregulated Fishing, 2016 < http://www.fao.org/fileadmin/user_upload/legal/docs/037t-e.pdf>

The PSMA Agreement allows countries to keep foreign-flagged vessels known or suspected to be IUU fishing out of their ports and prevent them from landing illegal catches.²⁰ In order to expand implementation, the FAO is delivering global capacity building programmes to assist developing states with improving States' capacity for the effective implementation of port State measures (PSMs) and complementary monitoring, control and surveillance (MCS) operations, measures and tools to combat IUU fishing

The FAO works with a wide range of partners including international organisations, governments, regional fisheries bodies, cooperatives and fishing communities, among others. The Coastal Fisheries Initiative (CFI) is one such example of FAO's integration with other organisations to support countries in sustainable use and management of fisheries. For this initiative, FAO is working with Conservation International, UN Development Programme (UNDP), UN Environment, World Bank and the World Wildlife Fund to implement five interlinked projects comprising of a combination of national and sub-regional projects in West Africa, Latin America and Indonesia.

WORLD BANK GROUP

The World Bank's global program on fisheries, known as "PROFISH," was established with donors and stakeholders to promote and facilitate the contribution that fisheries and aquaculture can make to poverty reduction, sustainable economic growth, better nutrition and economic opportunities for women. PROFISH seeks to accomplish this mission by designing and implementing good governance systems through World Bank investments and international partnerships; and providing information, knowledge products and expertise to help ensure that fisheries and aquaculture create sustainable wealth and reduce poverty. One knowledge product example is Bank research about the substantial opportunity to improve livelihoods by capturing the "Sunken Billions" or the forgone economic benefits of capture fisheries, estimated in the \$80 billion range annually—and increasing the supply from aquaculture systems. This research can be accessed here: <http://documents.worldbank.org/curated/en/355751466999721849/The-sunken-billions-revisited-progress-and-challenges-in-global-marine-fisheries-overview>

Examples of World Bank Group projects on sustainable fisheries, include the Africa Programme for Fisheries to invest in sustainable fisheries as a means of building resilience and improving livelihoods of coastal communities through job and food security. Other regional initiatives include: the 'West Africa Regional Fisheries Program' and the 'South West Indian Ocean Fisheries Governance and Shared Growth Program'. Information on both projects can be accessed here: <http://www.worldbank.org/en/programs/africa-program-for-fisheries>. The World Bank Group also funds national activities. Examples of recent activities include in Senegal, where measures were taken to develop fishery-specific management plans, and in Cabo Verde, Liberia, Senegal and Sierra Leone, where the the registration of 34,000 small-scale fishing boats was achieved to help monitor and control fishing.

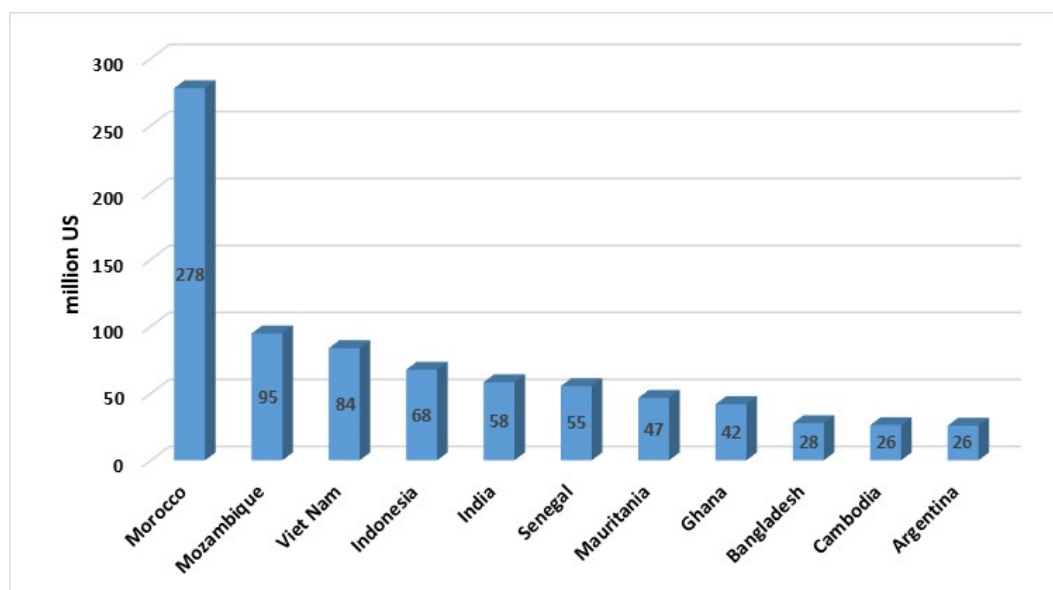
SECTION 3: WHO RECEIVES FISHERIES SUPPORT?

A total of 127 recipients benefitted from ODA financing for the fisheries sector in the period 2010-2017. Of these, 11 were least developed countries (LDCs) and received a total of 24% of all support (US\$ 623 million) over this period. A further 17 recipients were landlocked states.

Figure 3 below outlines the disbursements received at country level by the top ten recipients. Morocco received most ODA support (totalling US\$ 278 million), followed by Mozambique (US\$ 95 million) and Vietnam (US\$ 84 million). The top ten recipients accounted for 31% of the total ODA fishing support between 2010-2017.

²⁰ Food and Agriculture Organization, 'Growing momentum to close the net on illegal fishing', June 2018 < <http://www.fao.org/news/story/en/item/1137863/icode/>>

Figure 3: ODA Disbursements for fisheries by top recipient country, 2010-2017



Source: OECD Creditor Reporting System

Table 3 provides more detailed information on ODA support received by the top three recipients: Morocco, Mozambique and Vietnam. Total ODA projects reported for Morocco were 165 from 11 donors. For Mozambique 132 projects were reported from 17 donors, while for Vietnam 211 projects were reported from 15 donors.

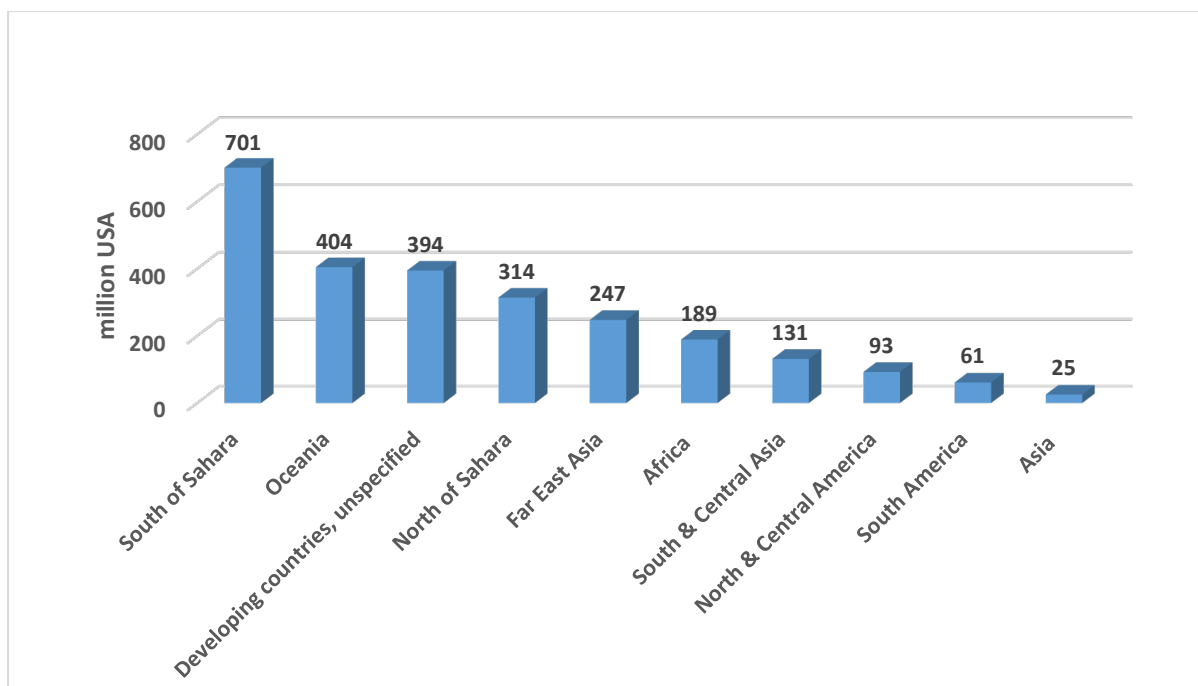
Table 3: Overview of the top three ODA recipients, 2010-2017

Recipient	Donors	ODA total projects	US\$ value of support in million
Morocco	Arab Fund, EU, France, Germany, Italy, Japan, Korea, New Zealand, Spain, United Arab Emirates, United States	165	278
Mozambique	African Development Bank, Arab Bank for Economic Development in Africa, Belgium, Canada, Denmark, Food Agriculture Organization, Iceland, IFAD, Ireland, Islamic Development Bank, Italy, Japan, Nordic Development Bank, Norway, OPEC Fund for International Development, Portugal, Spain	132	95
Vietnam	Asian Development Bank, Australia, Belgium, Canada, Denmark, EU, Finland, France, Italy, Japan, Korea, Norway, Spain, Sweden, United States	211	84

Source: OECD Creditor Reporting System

Africa was the region which received the highest transfers of ODA, totalling US\$ 1.2 billion or 46.3% of all fisheries support. Using OECD regional categories, African countries South of Sahara received US\$ 701 million, followed by African countries North of Sahara with US\$ 314 million. Africa also benefitted from regional projects totalling US\$ 194 million. Oceania was the region that received the second highest level totalling US\$ 404 million. Asia benefitted US\$ 271 million. Other regions listed that also received support included Americas with US\$ 10 million and Middle East with US\$ 11 million.

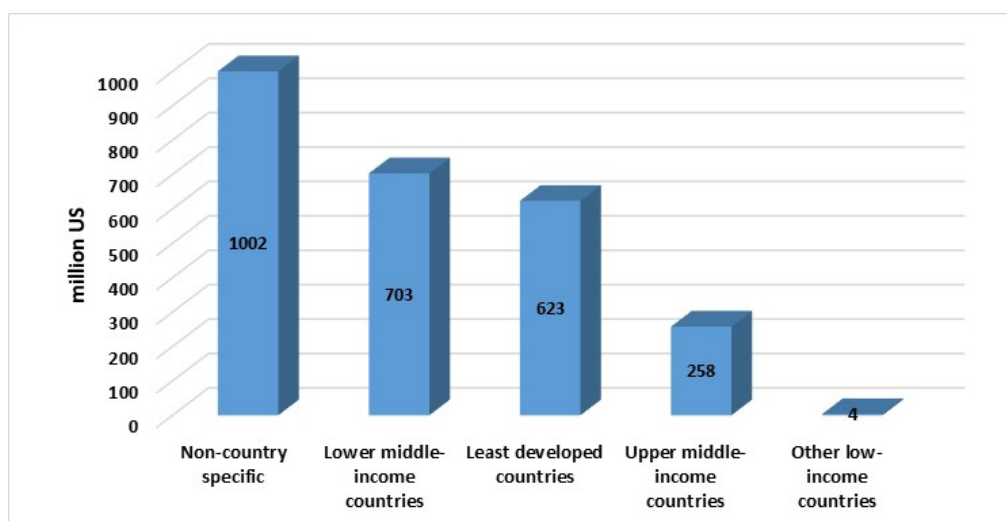
Figure 4: ODA disbursements for fisheries by region during 2010-2017



Source: OECD Creditor Reporting System²¹

Figure five below shows ODA support reported by income group. Non-country specific or regional projects was the category receiving the highest financing, just topping USD 1 billion. Lower middle-income countries received US\$ 703 million, followed by LDCs at US\$ 623 million. Upper middle-income countries received US\$ 258 million. Other low-income countries group received the lowest ODA support, with US\$ 4 million.

Figure 5: ODA Disbursements for fisheries per income group, 2010-2017



Source: OECD Creditor Reporting System

²¹ Please note that the chart uses OECD classifications and designations of regions.

SECTION 4: METHODOLOGICAL ISSUES:

This note focuses on the support reported to the OECD Creditor Reporting System over the period 2010-2017 in the reporting codes related to fisheries. A total of 11,882 entries were identified. Key word searching in other reporting categories for the word "fish" returns a further 1,705 entries over the period 2010-2017 in the OECD CRS database. The additional entries points to under-estimation of total support to the fisheries sector due to coding in different categories e.g. biodiversity protection (in which a further 214 entries were made) environmental policy (62 entries) etc. Also, important to note is that the reporting and coding of projects between different categories of fishery assistance may not be exact given that some projects contain aspects of different reporting codes.

The aim of this note is to provide a background briefing note on development financing to the fisheries sector. It has been prepared by the WTO Secretariat with support and assistance of the OECD.
