Executive summary

1. The European Union (EU) has a privileged connection with the Islamic Republic of Mauritania in terms of fisheries. Several successive fishing agreements since 1987 have authorised the EU's fishing vessels to access Mauritanian fishing zones. The current Fisheries Partnership Agreement (FPA) between the EU and Mauritania has been in force since 16 December 2006. The third protocol, running for two years, has been in (provisional) application since 2012. In order to authorise the Commission to negotiate another protocol in the name of the EU, before the current one expires, an independent ex ante and ex post evaluation was completed. This report presents its results.

Context

2. Mauritania is located at the extremity of West Africa, bordered by Western Sahara to the north, Senegal to the south, Mali to the south-east and Algeria to the north-east. Since its independence in 1960, the Islamic Republic of Mauritania has been a party to the group of ACP (Africa, Caribbean and Pacific) States, benefiting as such from advantages linked to the Cotonou Agreement. Mauritania scored 0.467 in the Human Development Index (HDI) in 2012, placing it 155th in the world ranking of countries (UNDP, 2013). The capital Nouakchott is located in the south while Nouadhibou in the extreme north is the main location for industrial and artisanal fisheries activities.

3. During the period of instability experienced by Mauritania between 2003 and 2009, the EU maintained its political and financial support to the country to help with its democratic transition (elections in 2006-07 and then 2009).

4. The Mauritanian economy is centred on mining activity (around 22 % of Gross Domestic Product - GDP) and fisheries (5 % of GDP). The recent development of the petroleum sector remains only embryonic.

5. The business climate has improved in recent years due to the adoption of a new Public Contracts Code and a new Investment Code, the creation of the country's first free trade zone in Nouadhibou, the modernisation of telecommunications services and several promising directions in the electricity and air transport sectors. Yet several pitfalls still impede the development of the private sector: an insufficient sharing of growth, the lack of competitiveness and failures of governance.

6. The exclusive economic zone (EEZ) of Mauritania covers an estimated area of 234 000 km². The northern and southern maritime borders have yet to be subjected to boundary agreements.

7. Relations between the EU and Mauritania are based on the Cotonou Agreement, on the Country Strategy Paper and on the national indicative programme (NIP) for the period 2008-2013. In 2012, support from the EU and its Member States represented nearly 90 % of the budget support to fisheries and the marine environment sector in Mauritania. The EU's contribution to the State of Mauritania (access rights and support to the fisheries sector policy) through the fisheries agreements is important because it is greater than that paid under the framework of the European Development Fund (10th EDF worth around EUR 26 million annually in 2008-2013; but less than EUR 20 million in 2008 and 2009). Also, for more than ten years, Germany has been providing technical assistance to the Mauritanian fisheries monitoring services.

The fisheries sector in Mauritania

8. Mauritania has some of the world’s most fish-abundant waters due to its strong upwelling coastal currents and a large continental shelf favouring the development of fisheries resources. A part of Mauritania’s waters has been designated a marine protected area (the Banc d’Arguin National Park is one of Africa’s most important marine protected areas). The use of motorised vessels in the park is forbidden.

9. The competent Mauritanian authority for fisheries is the Ministry of Fisheries and Maritime Economy (MFME, MPEM in French). The Mauritanian Institute for Oceanographic and Fisheries Research (MIOFR, IMROP in French) is in charge of the scientific monitoring of fisheries activity in Mauritania. It submits its recommendations to the management of MFME. The Directorate of Industrial Fishing (DIF, DPI in French)
is in turn responsible for granting licenses and monitoring payments for access rights. The Directorate for Management of Oceanic Resources (DMOR, DARO in French) is responsible for the planning, collection and processing of statistical fisheries data and their transmission to the Office of National Statistics (ONS). Finally, the Mauritanian Coast Guard (MCG, GCM in French) under the trusteeship of the MFME is responsible for monitoring at sea. It is supported by the maritime gendarmerie. The coastguards' fisheries monitoring centre is in Nouadhibou.

10. Mauritanian legislation distinguishes three kinds of fishing: artisanal, coastal and industrial. The access of foreign fleets to Mauritanian coastal fishing zones is made possible through bilateral agreements, private arrangements with private companies or by the acquisition of private licences. Access conventions are currently in force between Mauritania and a Chinese company (access to small pelagics) and a Japanese company (tuna), while a bilateral agreement with Senegal allows for access by an artisanal fleet of canoes and a Senegalese fleet of bait boats based in Dakar.

11. Excluding tuna catches, industrial fishing represented, during the period 2007-2012, between 85 and 90 % of the total catches declared by the artisanal and industrial fisheries (1 million tonnes in 2012) according to MIOFR. The industrial fishing of small pelagics is notable because it represented 820 000 tonnes on average over the same period, or around 90 % of total industrial fishing. EU vessels represent on average 30 % of the total catch of small pelagics. The artisanal sector targets all species and, beyond supplying the local market, it provides a large part of the fish destined for processing into meal and oil, of which the production reached 40 000 t and 4 700 t respectively in 2010.

12. The catch of EU vessels is not landed and marketed in Mauritania. The small pelagics are transshipped within the sheltered waters of Nouadhibou for onward shipping to Gulf of Guinea countries (Nigeria, Ivory Coast and Cameroon in particular) as well as to Russia and its neighbouring countries. Demersals enter into the distribution cycle of the Spanish market.

13. About 22 000 t of Mauritanian marine resources enter the European market each year. The country ranks as the 28th largest exporter of marine resources to the EU but it is the 4th largest exporter among the coastal states of West Africa.

The FPA between the European Union and Mauritania

14. The current protocol has been in provisional application since 16 December 2012. It was recently approved on 8 October 2013 by the European Parliament and validated on 15 November by the Council of the EU.

15. Two important provisions were included in the so-called ‘fisheries partnership’ agreement between the EU and Mauritania entered into force in 2006: the clause on non-discrimination aiming to ensure an equivalence in technical and financial conditions applied to the different foreign fleets operating in Mauritian fisheries; and the distinction within the financial contribution of the EU between the financial compensation paid for the access, and the financial contribution paid for the development of the Mauritanian fisheries sector.

16. The current FPA protocol also introduces some innovative clauses, coherent with the new principles of the common fisheries policy: one clause on human rights following the principles of the Cotonou Agreement, clauses on preferential access for EU fleets to marine resources taking into account systematically the surplus available in accordance with the United Nations Convention Law of the Sea for the calculation of the volume of catches authorised for fleets from the EU, and a consideration of the real price of the fish needed for the calculation of the contribution of the EU.

17. Thus, the current protocol is structured around access for nine categories of fishing for highly-migratory species (tunas and associated species), crustacea, demersal fish, small pelagics and cephalopods (without, for now, fishing possibilities being allocated for the latter) for an annual total authorised catch of 326 000 t, for around 135 fishing vessels each year at the most. The financial contribution of the EU (EUR 70 million) is composed of a financial compensation of EUR 67 million linked to access rights and EUR 3 million in sectoral policy support. The release of the sectoral support funds is for the moment made conditional upon
the use of the unexpended balances of funds for sectoral support under the previous protocol (1 August 2008 - 31 July 2012).

18. The historically significant cephalopod fishery made catches of around 25 000 t between 1994 and 2012. However, because of the fragility of the status of octopus stocks, and because of the willingness of Mauritania to reserve this fishery for its national fleet, the Parties have decided not to renew the fishing opportunities for the fishing category targeting cephalopods under the framework of the current fisheries protocol.

19. The rate of utilisation of the fishing opportunities during the first months was low to moderate, depending on the fishing categories, both in terms of use of licenses and in terms of catches. Around 150 000 t of fish had been caught in 11 months, or just under half of the annual volume of authorised catches, fixed at 326 700 t. The original terms of the protocol (areas of fisheries and access rights) would have been one of the main constraints for the vessel owners in addition to the uncertainty over the approval of the protocol by the European Parliament (lifted only on 8 October). However, the adaptations of these technical conditions made over the course of several meetings of the Joint Committee up to the end of September 2013 could improve the attractiveness of the protocol. For example, the EU shrimp vessels which had not applied for licenses since January 2013 have finally sought 13 licenses for the months of November and December 2013.

20. The freezer trawlers of the small pelagic fishery have, for the first 11 months of implementation of the protocol, captured the equivalent of 42% of the authorised annual catch volume (129 000 t compared to 285 000 t). The vessels of Poland, Latvia and Lithuania are the most active and account for the bulk of the catches. For tuna vessels, the rate of utilisation is very high since their catch should exceed 22 000 t at the end of the year.

21. For EU vessel owners, the EEZ of Mauritania is economically interesting. All the segments, except for fresh fish counted as small pelagics, show a substantial gross operating surplus. The number of jobs created is also substantial as there are more than 550 on-board jobs, of which 130 are for Mauritanian staff and result from the activity of EU vessels, to which can be added nearly 970 jobs on land. Therefore, the FPA generates altogether around 1 500 jobs. In terms of public investment, the FPA appears to be less interesting since, given the assumptions retained to estimate the economic result of the EU fleets operating in Mauritanian waters, each euro of financial compensation generates 0.80 euro in direct added value in the capture sector and a total added value of around 1.7 euros, but of which only 0.9 returns to the EU. It should also be mentioned that every euro originating from public funds invested by the EU provides a turnover of around EUR 2.12 if the amount of the financial contribution is taken into account.

22. Data from the Committee for the Eastern Central Atlantic Fisheries (CECAF), a regional fishery body of the Food and Agriculture Organisation of the United Nations, show that some small pelagic stocks are overexploited (round sardinella, cunene horse mackerel, shad). The average biomass of cephalopods is uncertain and very sensitive to environmental conditions. Access to this resource is reserved by Mauritania, mainly for its national artisanal fisheries whose production is 40 000 to 50 000 t annually. The coastal shrimp (maximum sustainable yield, or MSY, of 1 800 t) and deep-sea shrimp (MSY 2 500 t) are under-exploited. For the tuna fisheries, the regional fisheries management organisation of tuna and associated species in the Atlantic, the International Commission for the Conservation of Atlantic Tunas (ICCAT), concludes that there is a slight overexploitation of yellowfin tuna, exploitation at near-sustainable level for bigeye tuna and an exploitation level slightly above sustainable levels for skipjack. In October 2013, the Scientific Committee of ICCAT recommended the carrying out of a new stock assessment of skipjack tuna due to the recently strong catches along the Mauritanian coast by EU purse seiners notably using fish aggregating devices.
Conclusions of the evaluation

23. The current protocol was partially effective in that it has allowed the exploitation of less than 50 per cent of the opportunities for annual catches during the first 11 months of the protocol's implementation. Its contribution to the supply of EU and Mauritanian markets is correspondingly low. In terms of efficiency and acceptability, the level is medium because of the defection of vessel owners in the course of the first half 2013, due to the high burden of uncertainty and technical constraints. The lifting of these is generating a generalised keen interest in late 2013. In economic terms, without the sectoral support having been achieved at this stage, the current protocol is not contributing to an improvement of the fisheries management framework in Mauritania as the remainder of the sectoral support for 2008-2012 has yet to be used. In terms of consistency, the FPA is coherent with other EU policies on fisheries and development.

24. Two options are foreseeable in the future: the conclusion of a new protocol (option A) or not to conclude (option B). It is expected that the EU fishing fleets interested in fishing in waters under Mauritanian jurisdiction will be those which have been active during the current protocol and which have found an economic interest (a positive added value) - the tuna purse seiners and bait boats, trawlers for small pelagic fish, the vessels targeting hake and other demersal fish - and those highly likely to be active or interested such as the shrimp vessel fleet active during the end of 2013.

25. Under the hypothesis of a new protocol not being concluded, the EU vessel owners would likely seek access to the marine resources of Mauritania's waters through private arrangements. They could only do so after termination of the fishing agreement between the EU and the Mauritania. Mauritanian legislation has harmonised the major part of the access rights and the conservation and management measures of the foreign fleets in line with the terms of the fisheries agreement of the EU. The legislation provides, for example, for compensation costs, similar to the contribution of the EU, when the access of a ship is subject to a private arrangement (as for trawlers targeting small pelagic species). Assuming such a termination, it is unlikely that such an arrangement would attract the EU's vessel owners.

26. Option A is feasible and relevant if the contribution of the EU is better suited than the current protocol; there is a need to identify the categories of fish for which there is a strong probability of activity, taking into account the history, by category, of the number of active EU vessels and their catches within the current protocol. The number of fishing opportunities should thus be better estimated for the EU vessels targeting hake, for example, whereas the total volume of reference for tuna seiners should be revised upwards - taking into account the resolutions of ICCAT - to calculate the annual flat fee per vessel. It would be feasibly possible to open up fishing opportunities for octopus provided that the future protocol applies a mechanism similar to the current protocol: applying a category of fishing and then opening up fishing opportunities if Mauritania considers that a surplus of this resource is available.