

ORIGINAL: ENGLISH

**SECRETARIAT OF THE PACIFIC COMMUNITY**  
**THIRTY-NINTH MEETING OF THE**  
**COMMITTEE OF REPRESENTATIVES OF GOVERNMENTS AND**  
**ADMINISTRATIONS**  
(Nuku'alofa, Tonga, 6–9 October 2009)

**AGENDA ITEM 3.2 – UPDATE ON THE FUTURE OF FISHERIES STUDY**  
(Paper presented by the Secretariat after consultation with FFA)

**SUMMARY**

1. The Forum Fisheries Agency (FFA)/SPC study on the future of Pacific fisheries was approved by CRGA in 2008, subject to some amendments to the terms of reference. The study will take a broad, forward looking approach to the issues facing the region's fisheries and aquaculture over the next 25 years. The project was launched in mid-2009.
2. Consultants have been selected, following advertisement and tender; an expert panel of distinguished international fisheries specialists has been assembled to inform the study; and a steering committee of Pacific Island officials will review the draft report. The results of the study will be available in early 2010.

**Recommendations**

3. CRGA is invited to:
  - i. note progress with the study; and
  - ii. note with appreciation the willingness of members of the expert panel and project steering committee to participate in the process.

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## **FUTURE OF FISHERIES STUDY**

### **Purpose**

4. The purpose of this paper is to inform CRGA on progress with the ‘SPC/FFA Future of Pacific Fisheries Study’ which was approved by CRGA 38.

### **Background**

5. The Future of Fisheries Study is a forward-looking review of the issues and problems that may be expected to emerge in the region’s fisheries (including aquaculture) over the next 25 years. It will make recommendations on how these issues can best be addressed by stakeholders, including the relevant regional organisations.
6. The study was proposed at the Forum Fisheries Committee and CRGA meetings of 2008, and the draft terms of reference were amended based on comments received both during and after those meetings.
7. Funding was approved by AusAID to both FFA and SPC at the end of May 2009, as part of a larger package of assistance to both organisations. It was agreed that the study will be overseen by senior advisers of both organisations, with the Director of Marine Resources of SPC taking the lead role.

### **Revision of terms of reference**

8. Verbal and written comments on the terms of reference (TORs) were received from several SPC members. These suggested that:
  - the TORs were somewhat too ambitious;
  - the study should produce a relatively short readable output suitable for wide circulation;
  - the review of the future roles of regional organisations should not re-open the debate on the regional institutional framework; and
  - the funding available would not attract consultants of the required calibre for the proposed input (three consultants for three months each).
9. In response to these comments, the TORs were simplified somewhat and the time-span was set at 25 years (looking forward to 2035, which is one of the dates also used for climate change projections). The main output of the study will be a 20-page summary report in clear non-technical language, which will present three future scenarios. The study will focus on outputs required from the regional organisations rather than the institutional arrangements to achieve those results; and the proposals invited the use of one or more ‘lead consultants’, with shorter inputs from specialists in various areas.

### **Selection of consultants**

10. The finalised TORs, inviting bids from interested consultants, were circulated to all SPC contacts in late May, as well as being placed on FFA and SPC websites. Three compliant bids were received. These were evaluated by a joint FFA/SPC panel, which took the unanimous decision to select the bid by Gillett Preston and Associates (Fiji) and Thalassa Consulting (Australia). A contract was signed on 21 July. The lead consultants are therefore Mr Robert Gillett and Mr Ian Cartwright – a very experienced team.

**Guidance of consultants**

11. The terms of reference envisaged the consultants being guided by a steering committee of regional experts. In considering suitable candidates, it was decided that it would be useful to have a second, more international panel, to provide technical input into the study. As a result, 14 distinguished experts were asked to serve on this panel, all of whom agreed. These are listed in Table 1. Each panel member will provide written input to the consultants, refer them to relevant publications, and review the draft report.

**Table 1 : Expert panel members**

<b>Name</b>	<b>Position</b>	<b>Suggested area of expertise</b>
Dr Manuel Barange	Director - Globec	Scenario modelling
Dr Kevern Cochrane	Director Fisheries Mgmt. Division, FAO	Status of world fisheries
Dr Nick Dulvy	Canada Chair of Marine Biodiversity	Coral reef fisheries
Dr Ron Duncan	Professor of Economics and Government, ANU	Governance and economic growth
Dr Ray Hillborn	Professor of Fisheries Uni. of Washington	Global fisheries science
Dr Steven Hall	Director General – Worldfish	Small-scale fisheries management
Mr Joe Hamby	Managing Director Trimarine Group	Tuna industry
Dr Jim Joseph	Chair, Scientific Committee of ISSF	Global tuna management
Dr Robert Kearney	Emeritus Professor of Fisheries, Canberra Uni.	Recreational fishing, MPAs
Dr Kieran Kelleher	Fisheries Specialist, World Bank	Fisheries economics
Dr Daniel Pauly	Professor of Fisheries Uni. of British Columbia	Status of world fisheries
Dr John Sibert	Director Pelagic Fisheries Uni. of Hawaii	Tuna stock assessment
Dr Sena de Silva	President NACA	Aquaculture
Dr Meryl Williams	Chair ACIAR	Fisheries and aquaculture research

12. The steering committee will comprise a smaller group that will meet physically with the consultants to discuss their findings, as well as reviewing the draft report. It includes representatives of some other relevant agencies, as well as a cross-section of national fisheries heads. FFA and SPC staff will, of course, also participate in the meeting and review. Invited panel members are listed below – all have agreed to participate.

**Table 2: Steering committee members**

<b>Name</b>	<b>Position</b>	<b>Organisation</b>
Neil Andrew	Director Fisheries Management	WorldFish Center
Robert Jimmy	Director of Fisheries	Vanuatu Govt.
Glen Joseph	Director MIMRA	Marshall Islands Govt.
Jeff Kinch	Coastal Management Adviser	SPREP
Brendon Pasisi	Director DAFF	Niue Govt. & FFC Chair
Vina Ram-Bidesi	Marine Resources Programme	University of the South Pacific
Feleti Teo	Deputy Director	Forum Secretariat

**Approach and timing**

13. Work by the consultants commenced in August, and national consultations in five PICTs (Federated States of Micronesia, Fiji Islands, New Caledonia, Solomon Islands and Tonga) were schedule to be held before the end of October. During this time, the consultants will also analyse the wealth of material already produced on the region's fisheries. A steering committee meeting is scheduled for late November. The final report is due not later than the end of March 2010.

**Conclusions and recommendations**

14. The study is now being implemented by a team of experienced consultants, and should be completed by early 2010. A number of international and regional experts have agreed to provide input and guidance to the process.

**Annex – Main terms of reference for the study****GENERAL TERMS OF REFERENCE****Part 1**

The study will:

- a) Consider the future of fisheries over a 25-year timeframe (2010-2035) and identify key drivers of fisheries and aquaculture at local, national, regional and international levels. These will include: population growth and urbanisation; the pattern of global economic development; governance and political stability; climate change; and others.
- b) Evaluate the relative importance that will be placed in future on the use of aquatic ecosystems for economic growth, food security, sustainable livelihoods, ecosystem support services, conservation or other non-extractive uses.
- c) Evaluate the relative performance of current national and regional fisheries assessment, development and management systems in achieving their aims, taking into account as appropriate internationally agreed criteria being developed for formally evaluating the performance of Regional Fisheries Management Organisations.
- d) Develop three scenarios – best, worst and most probable case – for the status of the region's fisheries in 2035, distinguishing between sub-regions and groups of countries and territories as necessary.

**Part 2**

Taking into account the outputs of Part 1:

- a) Analyse and delineate the roles and responsibilities of national authorities and identify key areas where regional or international intervention enhances national efforts.
- b) Identify and analyse the priorities as well as gaps (technical, scientific, financial, management & governance processes) that need to be addressed in development and management of fisheries and aquaculture at national and regional level and recommend how these are best addressed to achieve the best scenario;
- c) Make recommendations on the optimum arrangements for collaboration between regional institutions to ensure future food security, livelihoods, economic growth and environmental sustainability;
- d) Report to the Forum Fisheries Ministers meeting and, through the Fisheries Ministers Chair or other appropriate means, to the Forum and the SPC Conference.

**DETAILED TERMS OF REFERENCE****Oceanic Fisheries – Challenge, threats & opportunities**

- i. Identify the key challenges, threats to and opportunities for maintaining the sustainability of oceanic fisheries; and assess options for addressing challenges and threats to the sustainability of oceanic fisheries including the Ecosystem Approach to Fisheries Management;
- ii. Review existing licensing arrangements for domestic fisheries and consider options that have the potential to increase the value of access to fisheries resources including rights based management;
- iii. Review existing licensing arrangements for foreign fishing vessels and consider options to increase economic returns to Pacific Island countries and territories, including alternatives to access agreements such as direct licensing;
- iv. Review national and regional policies to promote domestic fisheries industry development, evaluate their success and identify appropriate policy adjustments

necessary to foster development at the regional level and in a representative sample of countries and territories;

#### **Coastal Fisheries - Challenge, threats & opportunities**

- v. Identify the key challenges, threats to and opportunities for maintaining the sustainability of coastal fisheries, and identify options for addressing challenges and threats to the sustainability of coastal fisheries development, including the role of community based management and other approaches;
- vi. Assess the opportunities for increasing sustainable returns from the export of coastal fisheries resources including , beche-de-mer, trochus, and ornamental aquarium products;

#### **Aquaculture & Freshwater Fisheries- Challenge, threats & opportunities**

- vii. Assess opportunities to increase aquaculture production in the region as a means of contributing to fish supply, food security and generating income for coastal and inland communities;
- viii. Review the importance of freshwater fisheries in Papua New Guinea other PICTs with significant freshwater fish resources, and the threats and opportunities for their sustainability;

#### **Contribution of Fisheries to GDP, Markets and Trade**

- ix. Review recent analyses of the contribution of fisheries to GDP and identify key opportunities and constraints to increasing this in future;
- x. Analyse existing markets for Pacific island fish exports and identify weaknesses and areas for possible expansion, including through the establishment of new markets;
- xi. Review the FFA study on the effect of free trade agreements and other international trade arrangements and trends on fisheries trade opportunities for Pacific Island Countries;

#### **Food Security**

- xii. Assess the role that bycatch in industrial fisheries can play in increasing fish supply and contribute to food security, and consider the opportunities created by new catch retention measures in the purse-seine fishery;
- xiii. Review the contribution of artisanal and subsistence tuna fisheries to food security and how this could be increased by techniques such as FAD deployment;
- xiv. Consider other opportunities to improve food security such as increased harvesting of small pelagics and aquaculture;

#### **Gender and fisheries**

- xv. Review the role of women in fisheries and analyse opportunities for enhancing the role of women and increasing benefits to women from future fisheries development;

#### **Key development priorities and gaps**

- xvi. Assess the current status and trends of Pacific Island fisheries and ecosystems, based on the best information currently available and provide options for decision makers on way forward;
- xvii. Identify key development areas and gaps that would, if addressed, provide the highest impact to Pacific Island countries and territories in the main types of fishery in the Pacific and recommend options to address them;

**Institutional arrangements**

- xviii. Analyse existing national, regional and international institutional arrangements and governance processes. Identify the key weaknesses and make recommendations on some practical improvements that would promote sustainable fisheries, future food security, livelihoods and economic growth;

**Roadmap for implementation**

- xix. Develop and recommend a roadmap to implement key strategies and activities identified during the course of the study;

**A. METHODOLOGY:****General Approach and Outputs**

The study will be conducted by four team members: Bob Gillett, Ian Cartwright, Mike McCoy and Gert Van Santen.

Bob Gillett (Gillett, Preston and Associates) and Ian Cartwright (Thalassa Consulting) will be co-lead consultants; both will be involved in exploration of the full-range of topics to be covered and in discussions with staff of the regional organisations.

The two co-lead consultants will report to FFA and SPC on a regular basis. A number of international fisheries experts (the 'expert panel') will be invited to provide written input to the consultants and refer them to relevant material (published or otherwise). The consultants will review their contributions carefully, and may seek further information and clarification by email or telephone where required.

The consultants will undertake national consultations in at least five Pacific Island Countries and Territories, and solicit the views of stakeholders in the region's fisheries, including relevant regional organizations.

The first part of the study will provide a brief and clear statement of the status and trends in the fisheries of the region, the major issues and challenges, gaps that need to be addressed, an overview of the current capacity in fisheries and marine resource management in the region, and identify predicted needs. The second part of the study will examine ways in which national and regional institutions can be enhanced to address emerging needs and priorities.

A draft report with supporting presentations will be prepared and presented by Ian Cartwright to, and peer-reviewed by, a small 'Consultative Group' comprising Pacific Island sectoral specialists. A final report will then be prepared, taking account of the feedback from the consultative group.

The final report will be a concise document of not more than 20 pages, written in clear non-technical English. It will describe the three scenarios for the status of Pacific Fisheries in 25 years, highlight the main threats and opportunities, and propose a number of practical solutions. It will be supported by several more specialised technical annexes, which may include:

- An assessment of current and potential production from fisheries, against which to assess various impacts including population growth and climate change;
- An assessment of current and projected demands on fisheries resources for food security, income earning opportunities and formal employment;
- Material to inform the debate on the formulation of national development strategies;
- Material to inform the development of regional organisation corporate and programme plans;
- Material for the construction of strategic overviews to inform discussion in regional bodies;
- Other material relevant to the subject of the main report.