

37 Concluding Remarks

37.1 This Study and Similar Work in the Future

Because work similar to that of the three Benefish studies is likely to be undertaken in the future, it may be useful to note some of the lessons learned across these studies. A number of features of the research work in 2001, 2008 and 2015 were quite favourable, including the following:

- The study is very time-sensitive. Although the time frame for preparing, collecting, analysing and writing was tight (160 days), by having the work schedule compressed it encouraged producing the study in a timely manner.
- The institutional culture of SPC enables the production of such a major work within an established publishing schedule.
- Cooperation with SPC's Statistics for Development Division proved extremely valuable in a number of ways, including its liaison with the statistical agencies of the region, and assistance in areas where a fisheries specialist is not specifically qualified.
- In the present study the cooperation with other regional organisations involved with fisheries was secured prior to carrying out any work. Sensitive areas were discussed and satisfactory arrangements were finalised. Much valuable assistance was received from FFA and PNA.
- Cooperation with the FFA Economic Indicators Project proved mutually beneficial.
- Commencing work in mid-August is strategic, because tuna catch data and macro-economic data from the previous year begins to become available at that time.

- The supervising officers for all three Benefish studies adopted appropriate levels of involvement: that is, not micro-managing, but available to give support when needed, and flexible in accommodating unanticipated events.
- The concept of engaging suitably qualified people to collect information in some countries saved valuable time that could be more efficiently used by the main consultant in analysis and writing.

The major difficulty of the present study concerned the provision of data in-country. In many instances of country requests for data, information was not provided as discussed, despite follow-up. Future efforts would benefit from collecting as much information as possible while in-country, with an awareness of the fall-off in responsiveness to data requests once the researcher is off-site.

A number of changes should be made to future Benefish studies, including the following:

- There is a need to get young Pacific Island fisheries professionals involved in this work. Consideration should be given to attaching an individual to the main consultant for capacity enhancement purposes, to provide that person with the necessary skills and experience to carry out similar studies in the future.
- In the 2008 Benefish work a number of “add-on” studies were included (e.g. fuel and climate change) that had little to do with the main goal of quantifying benefits. The lesson is that it would have been better to resist such additional focus areas, and to retain focus on the core areas. In the current study there were attempts to add some extras, but the additional work was resisted. The task of completing a Benefish study in seven months is huge, and extra work adds to the risk of delays.
- For GDP purposes, fish processing is outside of the fishing sector, but this is where much of the “action” in fisheries-related benefits will occur in the future. This indicates the need to develop the conceptual framework for quantifying processing-related benefits – possibly through the initial pilot development in one country of a satellite account for fisheries in the national accounts – similar to what has been done for tourism in many countries.
- Additional work needs to be done on the appropriate methodology for quantifying and comparing fisheries-related employment. In the

regard, fisheries is more difficult than other sectors, with work ranging from small involvement in subsistence fishing, to labouring for months overseas on industrial vessels. The current employment studies produce mostly heterogenous assemblages of facts and information that are difficult to compare across other national sectors to obtain the absolute amount or relative importance of fisheries-related employment. Such an improvement is likely to require expertise in both fisheries and labour.

37.2 Some Key Points on Fisheries Production and Benefits

This study assessed the 2014 fisheries production of 22 Pacific Island countries and territories in six categories: coastal commercial, coastal subsistence, locally based offshore, foreign-based offshore, freshwater and aquaculture. It is estimated the volume of production in these categories was about 2 million metric tons,¹ worth US\$3.2 billion. The total volume of regional fishery production increased by 431,354 mt, or 32%, in the period 2007 to 2014. Expressed in 2014 prices, in that period the value of fishery and aquaculture production increased by US\$738,662,323, or 30.7%.

The following are some of the more surprising facts to emerge from the present study:

- 52.7% of all employment in the region that is directly related to the tuna industry occurs in Papua New Guinea.
- The 2014 tuna catch in Kiribati was 40.7% of the regional total, and was valued at about US\$1 billion.
- The volume of production from the coastal commercial fisheries of Samoa in 2014 approached that of PNG. The volume of production from the coastal commercial fisheries of Fiji is almost twice as much as that of PNG, despite PNG having a population almost nine times greater than Fiji.
- 93% of the value of all aquaculture in the region is produced in two French territories – French Polynesia and New Caledonia.

¹ This does not include the value of aquaculture production, due to the use of two different units to measure aquaculture production. In 2014 the volume of aquaculture production of the region was 4,217 mt and 9,122,169 pieces.

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- In only six PICTs of the region is aquaculture a significant activity (i.e. production value is greater than 5% of that of coastal fisheries). All but one (Cook Islands) of those are territories.
 - American Samoa's fishery exports represent about 47% of the fishery exports from all of the other countries and territories combined. The value of PNG's fishery exports represents about 41% of all the value of fishery exports from all of the other independent countries combined.
 - The total amount of fishery exports from the region fell by about 42% in real value in the period 2007 to 2014. The fall in the value of canned tuna exports from American Samoa was responsible for about 37% in the total regional decline.
 - Access fees for foreign fishing increased by 279% in the period 2007 to 2014 (which coincided with the period when the Vessel Day Scheme was introduced and became fully operational).
 - In 2014 four countries in the region received foreign access fees that represented more than \$1,000 per capita of the respective countries' populations.