



Independent evaluation of the

**Development Account Project 1415 M
Building Capacities of selected Least
Developed Countries to upgrade and diversify
their fish exports**

Evaluation and Monitoring Unit
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A. Introduction

A.1 Introduction and Purpose

1. The UNCTAD Evaluation and Monitoring Unit commissioned this final independent project evaluation for the United Nations Development Account (UNDA) funded project 1415M titled "Building Capacities of selected Least Developed Countries (LDCs) to upgrade and diversify their fish exports." The evaluation will provide accountability to UNCTAD management, the Capacity Development Programme Management Office/Development Account of DESA, project stakeholders, as well as UNCTAD's member States with whom the final evaluation report will be shared.
2. This evaluation aims to provide credible, factual and useful assessments of the project's performance and propose constructive recommendations to enhance the work of UNCTAD in this area and maximise synergies with other complementing interventions. The evaluation is scheduled at the conclusion of the project and provides a summative assessment against the criteria of: Relevance, Effectiveness, Sustainability, and Efficiency, Gender and Human Rights issues, and Partnerships. The evaluation provides assessments of the project design, project management, implementation and overall project performance. On the basis of these assessments, the evaluation formulated recommendations to project stakeholders, in particular to UNCTAD and/or the Capacity Development Office/Development Account of DESA with a view towards optimizing results of future projects, including on operational and administrative aspects.

A.2. Context of the evaluation

3. The Fisheries sector holds considerable potential for exports diversification and socioeconomic development of Least Developed Countries' (LDCs) economies. UNCTAD has identified fish and fishery products as being among the most important dynamic commodity products for LDCs, in which several LDCs have comparative advantages. The fishing industry generates employment opportunities at the bottom of the pyramid, generates export revenues and is also important for improving food security and affects environmental sustainability. Also, gender aspects, especially the role, status and equitable remuneration of women and their access to resources and services, play an important part in impeding the fisheries sector's potential to contribute to economic and social development in less developed countries.
4. Notwithstanding the importance of the sector – in 14 out of 47 LDCs, fish exports are ranked in the top five merchandise exports – it is often underdeveloped and underexploited due to supply and demand side challenges. Main supply side challenges are: deficient transportation and storage facilities; poor energy infrastructure and high electricity costs; a lack of investment, finance or credit for small operators; overfishing and depletion of fish resources; water pollution; and a lack of common fishery policies among countries that share water resources. On the demand side,

attaining compliance with the food quality and safety standards of importing countries is the most pressing challenge and poses considerable challenges for LDCs to unlock their export potential¹.

5. A growing diversity of stringent public or private quality and safety norms limit access to major import markets for many LDC fishery exporters. The fact that standards are not harmonized and go beyond internationally agreed reference standards (Codex Alimentarius for food products, and Sanitary and phytosanitary Standards-SPS- of the WTO) make it costly for LDCs to meet them: a large part of the fishery sectors in these countries are artisanal, and poorly equipped to comply with food safety standards and requirements across the value chain. The EU requirements in particular stipulate a certified national competent authority in the exporting country to be in place to enforce EU compliant standards and practices for all EU destined exports, extending to all stages of the value chain. These necessitate major investments across the value chain, in processing facilities and procurement methods, as well as testing and certification of products.
6. With a dominant share of retail trade held by large supermarket and retailers, there is a rise in application of private standards and certification in international supply chains. Private standards, which are more stringent than mandatory national standards and cover aspects other than food safety and quality – such as sustainability and eco labelling – cover over 70 percent of retail trade in fishery products. Private supply chains tend to promote larger suppliers to ensure closer control and standardisation in supplies and thus exclude artisanal and smaller producers. LDCs often fail to meet the stringent private standards of supermarkets and independent large retailers.
7. Consequently, the share of LDCs in world fishery exports rose only marginally from 1.6 to 3.5 per cent over three decades 1980- 2013, despite the preferential market access in major fish importing countries, particularly in the European Union. During this period, non-LDC developing country exporters have consolidated their market share and leadership, currently accounting for over 50% of the global trade in fishery products². The share of non-LDC developing countries in world fishery exports was around 30% in the 1980s.
8. Therefore, effective access for LDCs to major markets calls for a combination of investments in policies and regulations, promulgation and enforcement of internationally compliant standards and practices, and infrastructure across the value chain towards hygiene and food safety. While these enable stable and remunerative access to international markets including supermarket chains, they are often beyond the reach of small and medium enterprises, particularly artisanal fishers. This calls for a mix of public and private investments to ensure inclusiveness while fulfilling market requirements. These also influence the mix of trade and investment policies, including incentives for foreign investments in the sector.

¹ Source: UNCTAD 1415M project background document and 'Fisheries Exports and Economic Development of Least Developed Countries. Chapters 2 and 3 https://unctad.org/en/PublicationsLibrary/aldc2017d2_en.pdf

² Source: UNCTAD, based on data from FAO.

A.3 Subject of the evaluation

9. In order to assist LDCs in overcoming some of these obstacles, UNCTAD has implemented the UNDA project 1415M '*Building the Capacities of Selected Least Developed Countries to Upgrade and Diversify their Fisheries Exports*'. The project covered five Least Developed Countries: Cambodia, The Comoros, Mozambique, Myanmar and Uganda, and foresaw the preparation of country studies of the fisheries sector, as well as the holding of national and regional training workshops to assist national policy-makers, practitioners and experts in formulating export development and diversification strategies to tap the potential of the fishery sector. In particular, the workshops focused on building the knowledge and expertise needed to comply with international food safety and related sanitary and phytosanitary standards.
10. The project aimed to upgrade the technical knowledge and expertise in beneficiary countries to overcome challenges posed by international standards on fish exports. It aimed to highlight how international standards, regulations and measures in the areas of fish and fishery products affect LDCs' exports and their international competitiveness. The project also sought to identify successful experiences and best practices from other countries in taking advantages of the Fairtrade movement, among other private standards, in developed countries and the premium prices offered by organic market especially in Europe, the USA and Japan. Based on these, the project sought to identify policies and strategies for implementation with a view to improving capacity to comply with international standards and enhancing LDCs' capacities to develop and diversify their exports by tapping their fishery potential.
11. The **three expected accomplishments** (results) of the project were as follows:

| Expected accomplishments | Main activities |
|--|--|
| Increased expertise and technical knowledge of governments to formulate export development and diversification strategies to tap the potential of the fishery sector in selected LDCs; | <ul style="list-style-type: none"> • (A1.1) Undertaking policy-oriented research and analysis on export development and diversification with a view to drawing lessons from successful experiences and best practices in order to improve policies geared towards tapping the fish potential existing in countries covered by the project • (A1.2) Organizing five policy level training workshops (one in each participating country) on ways and means of addressing the challenges facing each country in formulating and implementing diversification policies and export promotion strategies with a particular focus on the fish sector. |
| Increased expertise and knowledge of governments and the private sector in selected | <ul style="list-style-type: none"> • (A2.1) Preparing background material for training on improving national standards and in complying with international sanitary and phytosanitary standards. This will draw heavily from the work of UNCTAD and the work of the |

| | |
|--|--|
| <p>LDCs about international standards with the view to improving national food safety standards; and</p> | <p>national and international consultants</p> <ul style="list-style-type: none"> • (A2.2) Organizing five expert level national training workshops to train participants from various operators in the fish industry in countries covered by the project to sustainably address the challenges of meeting international standards in fish exports. |
| <p>Improved capacity of governments and the private sector in selected LDCs to upgrade standards and comply with international food safety and related sanitary and phytosanitary standards.</p> | <ul style="list-style-type: none"> • (A3.1) Organizing inter-regional training workshop: The training workshop will bring together experts from Asian and African LDCs, participating in the project. • (A3.2) Developing an operational tool/manual on improving national food safety or sanitary standards for assisting stakeholders in upgrading national standards and improving compliance with the requirements of international standards, other private or industry standards as well as related measures and regulations • (A3.3) Organizing study tour for training of trainers from the five beneficiary countries to get expertise and hands on training in selected standards organizations or fish exporting industries in other advanced developing countries. National experts who would be trainers on sustainable basis will draw lessons from successful experiences of Viet Nam and Mauritius. |

12. The project started in 2014 with an approved budget of \$596,000, complemented afterwards with additional funding of \$255,775³ and an extension of activities until 31 May 2019. Activities were implemented in partnership with counterpart institutions in the beneficiary countries, usually the Ministry of Commerce, Ministry of Fishery Resources or similar branch of the government responsible for trade-related areas.

13. The main outputs were 8 workshops (5 national workshops in the participating countries; and 3 regional workshops in Africa and Asia), addressed to policy makers and practitioners in the fisheries sector. The discussions in national workshops enabled identification of the most pressing

³ According to the Project extension document (see attached), additional funding of \$255,775 was obtained from the DA office for activities that went beyond the scope of the initial project: such as establishing Centers of Excellence, delivering training courses, developing training manuals and mobilizing resource persons.

challenges and problems facing the fisheries sector together with institutional and policy responses to address the challenges; while the regional and inter-regional workshops provided intense training covering a range of topics identified in the national workshops and in the research, materials developed in the project. The main knowledge products consisted of: 1) a policy-oriented study *Export development and diversification in fisheries with 6 country case studies - Bangladesh, Cambodia, Comoros, Mozambique, Myanmar and Uganda* – with updated data and statistics; and 2) *A Training Manual on building the capacities of LDCs to upgrade and diversify their fish exports*, also translated into the national languages of participant countries.

14. According to the progress reports, 500⁴ policy-makers and practitioners (including 160 women) from 6 LDCs received training on fisheries sector development. Furthermore, with additional funding from the DA, the project identified and formalized arrangements with two Regional Centres of Excellence- one for the African region in Mauritius (The Mauritius Fishery Research Centre) and the second one for the Asian region in Vietnam (the Nha Trang University of Vietnam)- to serve as a training and capacity building hub for countries of the two regions on fisheries and fishery products. To date, two full programmes of training have been organized bringing together more than 110 experts, senior government officials, academic and civil society actors from several countries in Asia and Africa.
15. UNCTAD has also finalized the preparation of consolidated course material, covering the technical and regulatory(standards) aspects together with economic, social and environmental dimensions of the fisheries sector and aquaculture sub-sector. The training manual consisting of six technically rich modules, is designed to serve as the main material for the training courses to be offered at the two Regional Centres of Excellence. Sustainability and long-term viability of the training courses will depend on the availability of adequate and predictable financial resources both from the UNDA and donors.
16. With supplementary funding from the Government of China, 27 participants from three project countries were offered an intensive training and study tour opportunities to the Chinese Freshwater Fish Research Centre in Wuxi, China. In addition, UNCTAD organized a side-event with more than 50 people at the United Nations Ocean Conference in June 2017 in New York on the importance of enhancing export opportunities for LDCs and SIDS by tapping the potential of their fisheries resources. Also, with the support of International Maritime Organization (IMO) and the Common Fund for Commodities (CFC), UNCTAD organized a brainstorming meeting on Impact Financing in the Fisheries and Aquaculture Sector in Structurally Weak and Vulnerable Economies, in London in 2018.

A.4 Evaluation objective, scope and questions

17. This final evaluation of the project is expected to:

⁴ Beneficiary count data as per progress report furnished by UNCTAD

- Assess the degree to which the desired project results have been realised; and
- Identify good practices and lessons learned from the project that could feed into and enhance the implementation of related interventions.
- Make recommendations to build on the positive results of the projects and make adjustments to the design of similar interventions.

18. The evaluation criteria as presented in the TORs along with specific areas of enquiry are summarized below.

Table 1. Assessment Criteria

| Evaluation Criteria | Emphasis of assessment |
|------------------------------|--|
| <i>Relevance</i> | <p>Did the project design, especially its logical framework and results chain, and choice of activities and deliverables properly reflect and address the development and strategies of the developing countries, in particular policy development needs and challenges in application of international standards?</p> <p>Was the project aligned with UNCTAD's mandates and with the objectives of the UN Development Account?</p> <p>What is UNCTAD's comparative advantage in relation to the fishery sector and fish exports and to what extent did this project optimize it?</p> |
| <i>Effectiveness</i> | <p>Have the activities achieved, or are likely to achieve, planned objectives and outcomes as enunciated in the project document?</p> <p>Is there evidence that the beneficiaries' knowledge, understanding and capacity to prioritize, develop and manage policies and national standards have been improved?</p> <p>What are the lessons learned or best practices for similar future interventions?</p> <p>Is there evidence of any positive and negative changes produced by the project, directly or indirectly, intended or unintended? Are there indications of potential impact for achieving the project objective of improved national capacities to upgrade and diversify fish exports?</p> |
| <i>Efficiency</i> | <p>Have project implementation modalities, and internal monitoring and control been adequate in ensuring the achievement of the expected outcomes in a timely and cost-effective manner?</p> <p>Has the project leveraged in-house expertise, previous research and technical cooperation outcomes, existing databases, and other internal resources of UNCTAD and/or external collaboration from international development partners and mechanisms?</p> |
| <i>Sustainability</i> | <p>Is there evidence that beneficiary countries are committed to continue working towards the project objectives beyond the end of the project? Specifically, are beneficiary country stakeholders likely to take actions to develop or improve policies and national standards, and to upgrade and diversify the fish exports?</p> |

| | |
|-----------------------------------|--|
| | Have there been catalytic effects from the project both at the national/regional levels, and within UNCTAD? |
| Gender and human rights | <p>To what extent the design and implementation of the project incorporated gender equality, and can evidence be identified in this regard?</p> <p>To what extent have the beneficiaries been sensitized on the integration of gender equality considerations in the policies and strategies relating to the fisheries sector and fish exports?</p> <p>To what extent does the project advance UNCTAD's efforts to promote equal access to jobs and reliable source of income?</p> |
| Partnerships and synergies | How has the project advanced partnerships with international development partners and national and regional counterparts, the civil society and/or the private sector? |

Source: Evaluation TORs.

A.5 Methodology

19. The 1415M is in essence a knowledge dissemination project aimed at providing a well-rounded training package of technical knowledge and documentation and exchange of good practices to assist countries in developing appropriate policies and practices to improve their fisheries sectors. The basic intervention logic/ **theory of change** (as understood by the evaluator) is that the **provision** of technical knowledge in a progressive and systematic manner to people having appropriate roles in policy making **would strengthen expertise** to formulate **better policies and strategies** for the development of their fisheries sectors. These policies and strategies, with **adequate investments** in physical and institutional infrastructure in the sector and quality systems along the value chains will **enhance the productive capacities** and **competitiveness** for international markets. With **effective market entry approaches**, these can lead to a **sustained increase in export** volumes and improved realization for the national actors in the value chains.

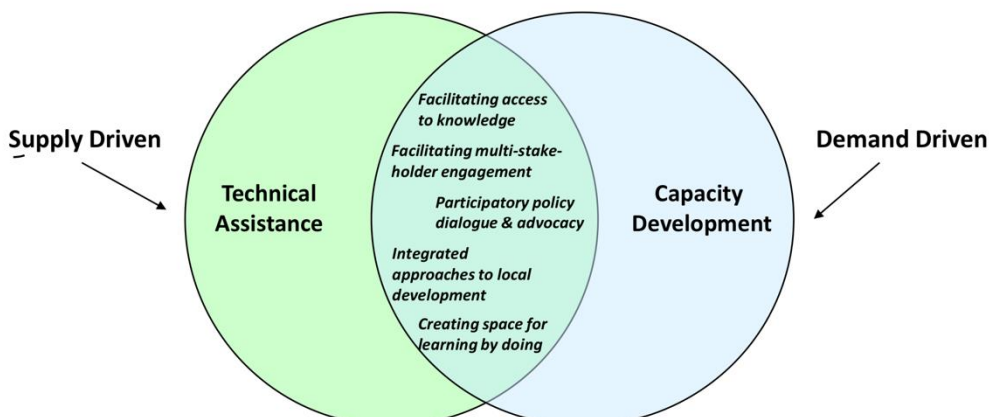


Fig 1. From UNDG Document: Towards a System wide approach to Capacity Development

20. The project's logic has been assessed from this perspective, which shows that the project realm was the supply of technical knowledge, the first step in the line of logic towards the final target outcome. At the same time, not all project beneficiaries are at the same starting point: some participating countries have made considerable investments in infrastructure and quality systems but still experience challenges in market penetration, which justify the need for additional knowledge in specific areas. However, in some countries, particularly Comoros and to an extent Myanmar, the sector is still in the primary stages, without any post-harvest transformation capacities.
21. The evaluation used a mixed-method approach, including mostly qualitative as well as limited quantitative data to draw conclusions and findings. Methods for data collection for this evaluation consisted of:
- Desk review of UNCTAD publications, official national documents, besides other authoritative sources as deemed appropriate to the subject covered (listed in Annex C);
 - Face-to-face interviews and/ or Skype/telephone interviews with relevant UNCTAD staff
 - Skype interviews with national partners, institutional beneficiaries and partner agencies;
 - Direct observation of workshop contents and interactions with delegate participants at the regional workshop in Mauritius during May 6-11, 2019, attended by over 50 participants including participants from the host country.
22. Inputs to answer relevant questions and sub-questions were outlined in an Evaluation Matrix and sought from UNCTAD as well as beneficiaries and triangulated by the evaluator. Additional details including the Evaluation Matrix can be found in the Inception Report, Annex B, and details of the persons contacted and interviewed appear in Annex F.

A.6 Limitations/Constraints

23. The evaluation encountered three major limitations: the first is the lack of specific indicators explanation in the project design of what its expected accomplishments mean in terms of knowledge, expertise and capacities at the level of governments and private sector at the country and sector level in relation to the scale and scope of coverage in the project, which focused only on a few anchor beneficiaries per country.
24. The second limitation is the lack of sufficient articulation in the theory of change as to the limited scale and resources represented by the project in relation to the size and magnitude of the challenges and the expected accomplishments, especially recognition of the influence of key factors beyond the scope and control of the project: upscaling of project learnings, uptake of policies and practices into actions, mobilization of investments needed to address supply side constraints, besides market factors.
25. The third limitation is intrinsic to the timing of summative evaluations such as these: difficulty of assessing quantifiable changes produced at sector/ country level within the short time horizon of the project and manifestation of impacts that in this instance can take several years beyond the timespan of the project itself. Comprehensive assessment of impact and changes resulting from

the project's interventions requires consistent follow-up and substantive evaluation at the country level. This is not only beyond the project's mandate and financial means, it is also a resource and time-intensive exercise. As a result of this, the project could not provide comprehensive project documentation to substantiate two of the three accomplishment indicators.

26. From a data perspective, the evaluation also notes the absence of comprehensive documentation regarding two of the three project Indicators: IA1: a report outlining major policy actions being considered for export development and the strategy forward; and IA3: a report outlining further capacity needs of governments and private sector to comply with international sanitary and phytosanitary standards. In the evaluator's view, ideally, specific information on these indicators should have been provided by the beneficiaries (fisheries ministries in the countries, but also potentially other key ministries, including trade, commerce, industry, ocean economy, agriculture) in order to truly demonstrate absorption of knowledge disseminated in the project.
27. In this regard, with the project only recently attaining completion, reasonable time should be given to beneficiaries to report back formally on actions deliberated and taken. Thus, the EA1 and EA3 of the project could not be assessed systematically at this stage, i.e., immediately upon the project completion. This experience also provides some lessons for the design of development account projects which shall be explained further in the section on lessons learned. In the absence of these two important information pieces, the evaluation relied considerably on using quality of knowledge uptake, from the workshop evaluation survey(?), by participants as a proxy for capacities and relied on direct observation of the regional workshop in Mauritius in May 2019 to form impressions. These are detailed further in the assessments on effectiveness.

B. Findings

B.1 Relevance

EQ. Did the project design, especially its logical framework and results chain, and choice of activities and deliverables properly reflect and address the development and strategies of the developing countries, in particular policy development needs and challenges in application of international standards?

Finding 1: The project was well designed with a clear intervention logic, and addressed specific challenges and constraints of selected LDCs in developing the export potential of their fisheries sectors. The project primarily focused on providing policy makers with useful and actionable knowledge of good practices towards enhancing competitiveness as well as resource sustainability.

28. Based on the document reviews, the evaluation observed that the project analysed: the important contribution of fisheries sector in several LDCs to food security, livelihoods and with the potential

for exports-led development. Despite the importance of fish products in their export composition⁵, many LDCs are unable to sustainably tap the full potential of their fishery resources for socio-economic transformation, substantial income generation and export diversification. The project analysed structural constraints preventing LDCs from developing their fisheries sectors (artisanal fisheries, poor infrastructure, inadequate institutional capacities to deal with and comply with international market standards, and poor governance in relation to illegal, unregulated and unreported (IUU) fishing, which threaten the sustainability of fish stocks.

29. As a result, LDCs are unable to comply with food quality and safety standards imposed by importing countries, despite the existence of preferential (duty-free, quota free access) trade arrangements from developed countries. Effective access to major markets calls for a combination of investments in policies and regulations, promulgation and enforcement of internationally compliant standards and practices, and infrastructure across the value chain towards hygiene and food safety. While these enable stable and remunerative access to international markets, they are often beyond the reach of small and medium enterprises, particularly artisanal fishers, and call for a mix of public and private investments to ensure inclusiveness while fulfilling market requirements. These also influence the mix of trade and investment policies, including incentives for foreign investments in the sector. These policy choices have the potential to transform the structure of fisheries sectors and the distribution of economic benefits down the value chain.
30. **Specific Relevance to participating countries.** The project originally targeted five countries: Bangladesh, Cambodia, Comoros, Mozambique and Uganda, based on the specific relevance of fisheries sectors for their equitable economic development⁶. Bangladesh subsequently opted out of the project and was replaced with Myanmar. The fundamental importance of the fisheries sector was clear: four countries– Bangladesh, Cambodia, Myanmar, Uganda– were among the top producers of inland capture fish, by capture volumes, during 2003-2012 (FAO, 2016). However, their experience in fish products trade has been volatile; for instance, Uganda and Bangladesh have been active exporters to the EU since the 1990s, suffered market bans, and subsequently overcome them. The relevance of this project to these leading LDC exporters is not only in technical standards development but also having effective market penetration strategies through upgrading to higher value products and obtaining sustainability certification for the practices.
31. A detailed note on this is presented in Annex.

Finding 2: The evaluation notes that project had a good design with focus on multiple issues that impede the growth and development of the fisheries sector: productive capacities for upgrading and diversification, compliance with international market standards, governance and protection from

⁵ Source: UNCTAD. Fisheries Exports and Economic Development of Least Developed Countries. Page 3. https://unctad.org/en/PublicationsLibrary/aldc2017d2_en.pdf

⁶ According to information received from project staff, the countries were initially identified and proposed by UNCTAD based on potential for transformation, and respective governments (except Bangladesh) accepted to participate in the project.

Illegal, Unregulated and Underreported (IUU) Fishing, and showcased relevant developing country success models for adaptation in LDC contexts. Given its limited scope and financial scale, the emphasis of activities was rightly on enhancing the knowledge/ expertise of a few **anchor beneficiaries** having a direct influence and role in shaping the course of policy actions and sector development.

32. **Quality of Design.** The evaluation endorses the project's intervention logic as presented in the project document. The project identified constraints and unexploited opportunities in production and export for LDC's fisheries sectors, leading to below potential performance and contribution to trade, poverty reduction and sustainable development. The underlying causes were identified as: weak productive capacities (lack of shared vision and strategy, poor infrastructure, low investment, nascent value chains, low entrepreneurial capacities); weak institutional capacities; and weak market development approaches. The evaluation also concurs with the project focus on: enhancing productive capacities to upgrade and diversify fish exports as well as to meet international standards; and improved institutions to support fish product exports complying with international standards, and requirements of the principal target markets. The world's major markets EU and the USA have stringent food safety requirements and environmental standards. At the same time, there is also a growing demand from Asia, especially China and the Arabian Gulf countries for fish exports from Africa. The project's training content is aligned to the requirements of these major markets. Lastly, the project focus on regulatory governance is well justified: stock assessments, regulatory mechanisms for stock replenishment and protection from overfishing. UNCTAD has been at the forefront of international consensus-building on IUU issues, including at the WTO deliberations. Regulations to curb IUU fishing and implement Port State Measures Agreement are important governance aspects covered in the project.
33. **Relevant Development Experiences.** An important element of the 1415M design was the reliance on highlighting the experience of developing countries, which are more relevant for LDC contexts than the lessons from middle-or high-income countries. The success trajectories of developing countries and even some LDCs are more readily understandable and replicable, by identifying the key transformative policy actions implemented in these successful countries. The case studies of Vietnam and Mauritius, and the hands-on training received in Vietnam and in China were considered by participants to be more 'relatable and relevant to LDC settings' than European case studies and practices. According to some participants met by the evaluator, the success of Vietnam and its rise from LDC to LMIC status with fisheries as its first export sector was highly encouraging, and the business model was considered achievable by LDCs, as also evidenced by Bangladesh's quick progress in aquaculture.
34. **Primary beneficiaries.** As primarily a knowledge transfer project, the selection of participants is considered an important feature of design that can affect quality of results. For the international training workshops, the project invited two delegates from the Fisheries ministries/ departments of each participating country, nominated by respective governments. However, UNCTAD had no formal role or say in the screening or selection process, nor did the project formally specify any criteria for the profile and experience of delegates to be sent for the training workshops. The

training contents as perused by the evaluator call for a good mix of technical expertise in fisheries besides experience in policy-making, and thus the best-suited delegates are technocrats holding senior positions in Fisheries development with policy advisory roles. The evaluator also considers good communication, articulation and leadership skills as important supplementary criteria for delegate selection, given their expected role in spearheading any policy consultations applying the knowledge from the trainings. Notwithstanding the absence of formal selection criteria, the evaluation notes that the delegates included a mix of senior policy makers, officials with specialized technical responsibilities in fisheries, and in some cases, academicians with relevant expertise, which can be considered a good mix of stakeholders for onward dissemination of good practice. However, to ensure maximum returns on investments, training interventions can benefit from having more consultations with project partners to ensure that candidate profiles chosen have the greatest prospects through their positions and roles for onward dissemination-of the knowledge and awareness raised through the project.

EQ. Was the project aligned with UNCTAD's mandates and with the objectives of the UN Development Account?

Finding 3. The project is consistent with UNCTAD's role and mandate focusing on an integrated treatment of trade and related issues towards inclusive and equitable global economic environment for sustainable development as outlined in UNCTAD's various mandates, is consistent with the Agenda 2030 for Sustainable Development, and also in line with the intents and requirements of UN DA projects.

35. **Relevance to UNCTAD Mandates.** The project is fully consistent with UNCTAD's role in supporting to least developed countries to enhance their effective participation in regional and global trade, emphasized in the Nairobi Maafikiano (Paragraphs 8, 9 and 13); Doha Mandate, (Paragraph 17 (f)), Accra Accord (Paragraph 91); the Istanbul Programme of Action (IPoA) for LDCs for 2011-2020 (Paragraphs 58, 60 (h), section 3 and paragraph 256), and the Vienna Programme of Action (target 3 trade, target 5 economic transformation). UNCTAD was established to promote an inclusive global economy, through informing national and international policies, while giving priority consideration for the needs and interests of developing countries. As the focal point of the United Nations for the integrated treatment of trade and interrelated issues in the areas of investment, finance and technology as key drivers of the inclusive, equitable global economic environment for sustainable development, UNCTAD has a critical role in advising on the policy dimensions of trade and sustainable development, promoting the integrity and complementarity of the three dimensions of sustainable development.⁷ The Nairobi Maafikiano (UNCTAD XIV) recommended UNCTAD to consider four action lines as identified by the Secretary-General in the report 'From Decisions to Actions': building productive capacity to transform economies; promoting

⁷ UNCTAD XIV Nairobi Maafikiana Para 8, 9 and 13.

a development focus and more efficient markets; tackling vulnerabilities, building resilience; and strengthening multilateralism and finding common solutions. The project is also relevant to UNCTAD's work relating to the SDGs in general, particularly SDG 14 (Life below water), which deals with the sustainability of the ocean economy, besides having strong linkages with SDGs 1 (Ending Poverty in all forms), SDG 10 (Reducing Inequality within and among countries), SDG 8 (Full and Productive Employment and Decent Work) and SDG 5 (Gender Equality and empowerment of women and girls).

36. The project is also directly relevant to UNCTAD Programme 10: Trade and Development, Subprogramme 5: Africa, least developed countries and special programmes, which addresses development challenges in the poorest and most vulnerable countries in the world, under the vision of "prosperity for all", coordinated by a dedicated Division for Africa, LDCs and Special Programmes.
37. **Alignment to UN Development Account guidelines.** The overall theme of the ninth tranche of the Development Account is "Supporting Member States in designing and implementing strategies and policies towards sustainable, equitable and inclusive development", with an emphasis on support to capacity development. Reflecting this, projects financed under the ninth tranche aim at building the socio-economic capacity of developing countries through collaboration at the national, sub-regional, regional and inter-regional levels. The Development Account mechanism enables exchange and transfer of skills, knowledge and good practices among target countries within and between different geographic regions, and access to the normative and analytical expertise of the United Nations Secretariat and on-going policy support, particularly in areas where such expertise does not reside in United Nations country teams.⁸ Projects are expected to use human and technical capacities within developing countries, to the extent possible, in order to maximize knowledge transfer and developing skills and capacity-building within developing countries, including through South-South cooperation.
38. The key deliverables in regard to capacity development in DA projects are:
- national and regional/inter regional training workshops; case study tours promoting north-south and south-south cooperation;
 - analytical products such as: country/case/sub-regional/ global studies;
 - guidance tool kits, methodologies, models, guides, manuals and innovative practices;
 - platforms, networks and committees at various levels, and
 - Policy support, policy documents and national action plans.
 - Pilot approaches and innovative practices that can be replicated/ upscaled
39. **The 1415M project design incorporates nearly all these elements.** Its eventual beneficiaries—especially artisanal fishing communities—are among the poorest of the poor; the target export markets include, on the one hand the EU and US, which are large and high value markets but also

⁸ Noted from descriptions appearing on the UNDA website,

have strict food safety controls and on the other, a large emerging market of China, which is positioning itself aggressively in Africa for both imports and exports. The project also targets both policy makers and industry operators in its activities and relies on inter-country experience sharing and the transfer of knowledge from more successful non LDCs to several LDCs under the south-south cooperation modality.

B.2 Comparative Advantage

EQ. What is UNCTAD's comparative advantage in relation to the fishery sector and fish exports and to what extent did this project optimize it?

Finding 4: The project drew from UNCTAD's comparative advantages in the area of trade, especially its long-standing work on non-tariff measures and their impact on LDC exports, complemented by the sector-based expertise of a number of organisations in the dissemination of knowledge and training contents in the project. UNCTAD's convening power through its body of work in LDCs, being one of ten agencies entitled to funding for UNDA projects, and also the convener of the UN Inter-agency Cluster on Trade and Productive Capacity also represent a form of comparative advantage. Being UNCTAD's first project in fisheries sector, the 1415M also contributes to future comparative advantage.

40. **UNCTAD work on LDCs.** The project draws on UNCTAD's institutional expertise in policy research and analysis, technical assistance, policy formulation and advice concerning LDCs, including lessons drawn from projects in LDCs in export competitiveness of natural resources. These lessons aid in formulation of natural resources policies placing the fisheries sector within the larger context of the socio-economic development and the attainment of relevant internationally agreed development goals. UNCTAD expertise was further complemented by the expertise of project partners; those observed first-hand include: FAO, which has leading expertise in fisheries and aquaculture, and influencing global actions towards responsible fisheries; research and academic institutions in Vietnam and Mauritius with their practical expertise in value chain development; and Marine Stewardship Council, which provides the roadmap for ecolabelling and sustainability certification.
41. **Non-Tariff Measures:** UNCTAD, as the UN lead agency on trade and development has been engaged on trade barriers as a development issue and has a large repertoire of research and analysis on non-tariff measures and their impact on trade, especially for least developed countries. According to UNCTAD³ there are on average about 2.5 times more distinct technical measures applicable for fish products than for manufactured products. Flagship publications of specific relevance to fisheries include: Fish Trade and Policy: a primer on non-tariff measures⁹, and the Trade and Environment Review 2016¹⁰. A perusal of these revealed many useful lessons of interest

⁹ UNCTAD Research paper No.7, UNCTAD/SER.RP/2017/7

¹⁰ UNCTAD/DITC/TED/2016/3

to policy makers and practitioners: there are strong linkages between various international agreements on fisheries governance, the Agenda 2030 for Sustainable Development and the Global Trading System, and these affect ocean states, especially LDCs more significantly than others, given their higher dependence on fisheries and the ocean economy. Non-tariff measures affect fish products more intensively than other products. Food safety technical regulations, SPS measures and TBTs are applied on food products by all countries, but these measures affect fish products much more than non-fish food products. The trade impact of NTMs is much more than the impact of tariffs and negates the market access potential tariff preferences accorded to LDCs. Even though LDCs enjoy zero tariffs from major importing countries, the impact of standards and NTMs is several times higher than the imposition of tariffs. In 2012, the International Association of Agriculture Economics ¹¹ released a study that estimated the ad valorem tariff equivalents of EU's food safety standards on imports of fish products from Kenya, Tanzania, Uganda and Zambia to be in the range of 63% to 270% for import of frozen fish fillets from the East African Community.

42. Drawing on UNCTAD's past work on economic effects of NTMs¹², the 1415M project publications contain illustrative evidence of the trade compliance costs for exports of fish products from Bangladesh and Uganda.
43. The EU's ban in 1997 on import of Bangladesh seafood on food safety concerns caused an export loss of \$ 15 million and necessitated a capital investment of \$ 17.6 million in processing and quality control infrastructure, besides over \$ 0.45 million in industrial training on HACCP systems. Also, a number of regulatory amendments were made to upgrade the national SPS standards. In 2002, another ban declared by the US FDA, which led to a loss of \$ 30 million. Again in 2008, the EU imposed a ban on imports of prawn and shrimp due to antibiotic residues in shipments, which then resulted in installation of additional inspection equipment. These experiences have shaped Bangladesh's trajectory and made it the only reliable and stable LDC supplier to the EU and USA.
44. During 1996-2000, the EU imposed three export bans on fish from Uganda because of quality and safety issues: detection of salmonella, incidence of cholera epidemic in fish landing centres, and fish poisoning scare in all of Lake Victoria, respectively. Diagnosis revealed the lack of coordination, poor inspection and laboratory capacities, outdated regulations, and lack of application of importing country requirements for export processing. With several corrective actions covering regulations, capital expenditure in processing, export inspections, and trainings, the ban was lifted in 2001, however, only for export of capture fish: aquaculture produce is still not allowed.
45. **Trade-related Fisheries SDG targets:** An important illustration of UNCTAD's comparative advantage was found in the project's linkages to the High-Level UN Conference to Support Implementation of SDG 14: Life below Water. UNCTAD, along with FAO coordinated and co-convened the Informal Preparatory Working Group 4 (IPWG-4) tasked with facilitating work on targets relating to sustainable management of fisheries, fight against IUU fishing, elimination of

¹¹ <https://doi.org/10.1111/j.1574-0862.2012.00609.x>, International Association of Agriculture Economics, 2012

¹² The Economics behind non-tariff measures, Policy Issues in International Trade and Commodities, Series 57, Marco Fugazza

harmful fisheries subsidies, and promotion of market and resource access for small-scale artisanal fishers. This work focuses on three trade-related SDG 14 targets: 14.4, 14.6, and 14.b, relating to trade aspects, with a view to advocate effectively for formulation and adoption of appropriate trade rules through the WTO agreements. The summary document provides an analysis of the challenges and recommends a number of actions towards action-oriented partnerships, and advocates for a number of UN resolutions to collectively address the challenges.

46. Drawing on FAO's expertise and leading work on fisheries and aquaculture, UNCTAD and FAO issued a joint UN publication in 2017¹³, which provided evidence of the current state of affairs and recommended a set of actions to attain the three targets. The analysis and recommendations therein provide useful knowledge and arguments for member states in the deliberations toward a fisheries subsidies' outcome at the WTO Ministerial Conferences. Important milestones in the advocacy around these issues are:

- WTO Ministerial Conference 2015: Issue of joint statement by 26 WTO Members calling for prohibition of subsidies that contribute to overfishing and over capacity, and subsidies linked to IUU fishing.
- UNCTAD XIV (2016): release of the UN Roadmap led by UNCTAD, FAO and UNEP on implementation of SDG Target 14.6 and effective implementation of the Port State Measures Agreement
- September 2016: An initiative to prohibit harmful subsidies through plurilateral negotiations was launched by 12 WTO members.

47. **Complementarity with UNCTAD's other LDC-linked programmes:** The evaluation learnt that the 1415M is UNCTAD's first project focusing on the fisheries sector. It is led by the UNCTAD Division for Africa, Least Developed Countries and Special Programmes, which also has implemented several technical cooperation projects including under the Enhanced Integrated Framework. There are many avenues for UNCTAD to engage with countries to develop competitive productive capacities in fisheries based on the initial spadework done in the 1415M. UNCTAD can build on the 1415 M's results to develop technical cooperation projects to outline a road map for sector development and catalyse a sequence of policy actions and investment initiatives to develop/ improve the fisheries sectors of interested countries. The common nature of the needs from several countries also heightens the prospects of multi-country interventions. Also, UNCTAD's implementation role in the EU-ACP partnership (which covers over 45 countries including in several small island states with fisheries sector potential) provides opportunities for trade-related technical assistance for enhanced market access into the world's largest market for fishery product exports.

48. **UNCTAD's coordination of UN Inter-Agency Cluster on Trade and Productive Capacity.** UNCTAD's thrust on the integrated treatment of trade and development issues in technical

¹³ Summary Document: UNCTAD/DITC/TED/2017/3

cooperation translates into a number of interlinked areas that lead to strengthening of trade and productive capacities. Activities of the 1415M touch upon these areas:

- Trade policies, trade negotiations and integration into international trade and markets
- Investment policies, investment promotion and enterprise development
- Trade support services, logistics and trade facilitation
- Cross-sectoral issues: economic development, livelihoods, food security, environment

The UN Inter-Agency Cluster on Trade and Productive Capacity coordinated by UNCTAD provides a platform for implementation of the priority actions identified by the 1415M's country studies and technical training contents.

49. **Complementing Expertise from other agencies.** The evaluation took note of training modules covering the broader concept of the Ocean Economy, and contents on sustainable fisheries management, especially stock assessments and monitoring, ocean surveillance, and marine protected areas, which are important to the long-term sustainability. Many of these, being sector specific, are not UNCTAD expertise areas. UNCTAD successfully brought in expertise from other agencies, to increase the relevance and value of the project to the participant delegates. Several training sessions were conducted by other agencies and institutions particularly specialized in those areas. For instance: fish stock management by FAO; Marine protected areas: Oceanographic Institute, Ministry of Oceans, Mauritius; Ecolabelling for fisheries- Marine Stewardship Council; marine pollution - International Maritime Organization, besides the experts from academia and universities in Vietnam and Mauritius.

B.3 Effectiveness

EQ. Have the activities achieved, or are likely to achieve, planned objectives and outcomes as enunciated in the project document?

Finding 5: The project has contributed useful and actionable technical knowledge to policy makers and practitioners to embark on formulating/ improving fisheries sector development plans with a market orientation and with due consideration to resource sustainability and environmental governance. However, the expected accomplishments as formulated (improvement of capacities of government and private sector in the participating countries to upgrade standards and comply with international food safety and related sanitary and phytosanitary standards) are not achievable from the project's activities alone; they call for several complementing investments to apply the benefits ensuing from the project's contributions to technical knowledge and awareness of good practices. These could have been cited as assumptions in the project's theory of change.

50. The major outputs noted from progress reports (Table 2 of the report for 2017) are the following:

- **Knowledge products:** A policy-oriented research study "Fishery exports and the economic development of Least Developed Countries: Bangladesh, Cambodia, the Comoros, Mozambique, Myanmar and Uganda"; and "Training Manual on building the capacities of

LDCs to upgrade and diversify their fish exports', validated by policy-makers and practitioners (English and translated in national languages);

- **Identification of the binding constraints** as well as policy recommendations on how best to overcome them, through national workshops
- **Trainings in national and regional workshops** to more than 500 policy-makers and practitioners (including 160 women), delivered in cooperation with several experts and specialised institutions.
- China training programme and study tour for 27 participants from three project countries (Cambodia, Mozambique and Myanmar).
- **UNCTAD side event at the UN's Our Oceans Conference** in June 2017 in New York, showcasing challenges facing Cambodia and the successful experiences of Mauritius.
- **Memoranda of Understanding for two Regional Centres of Excellence** in Mauritius and Vietnam, for continuing the training curriculum using the model developed in the project;
- **Organization of two training courses at the two Regional centres of Excellence, which attracted more than 110 participants from several countries in the Africa and Asian regions;**
- **Development, dissemination and elaboration of comprehensive course material, covering technical or regulatory (standards), economic social and environmental dimensions of the fishery sector.**

The evaluation also notes a strong push to create an institutional repository and disseminate findings of the project to a larger audience through project specific websites, publication and reporting on events, impact stories and success stories.

51. The project's expected accomplishments as stated are:

- Increased expertise and technical knowledge of governments to formulate export development and diversification strategies to tap the potential of the fishery sector in selected LDCs;
- Increased expertise and knowledge of governments and the private sector in selected LDCs about international standards with the view to improving national food safety standards; and
- Improved capacity of governments and the private sector in selected LDCs to upgrade standards and comply with international food safety and related sanitary and phytosanitary standards.

The three corresponding indicators of achievement are stated as:

- IA1. Report from each country meeting includes proposals on the necessary policies to adopt and the strategy forward
- IA2. Percentage of survey respondents that indicate that they have an improved understanding of international standards with the view to improving national food and safety standards; and

- IA3. Report for each participating LDC to improve governments and the private sector capacity to formulate and implement policies and strategies to comply with international sanitary and phytosanitary standards.

52. Of the three indicators, the project formally collected evidence on IA2, through end of workshop surveys at each of the training events conducted. The findings from these are covered in more detail in coverage of beneficiary feedback (paras 67-69) On IA1, the evaluation did not find evidence from or after the national workshops of any formal proposals by participating countries for necessary policies and strategies for upgrading the sectors. However, the evaluator had first hand observations in the final regional workshop as to the identification of key actions that would be considered by participants based on the knowledge acquired in the workshop, However, these were participant's individual views and could not be considered officially endorsed proposals. Similarly, for IA3, while UNCTAD has produced useful analysis of challenges for each of the countries, and described the menu of actions to be taken in respect of demand side and supply side constraints in its training manuals¹⁴, the evaluation did not find evidence of any other country-specific reports to improve governments and the private sector capacity to formulate and implement policies and strategies to comply with international sanitary and phytosanitary standards. Rather, the evaluation considers these to be tasks that ought to be performed by the beneficiary countries subsequent to the project's completion, after due consultations in government processes.

53. The project's intervention logic is that the availability of technical knowledge would add to enhancement of expertise, and capacities to improve national standards and enhance compliance with market requirements, thus boosting export volumes and revenue. In the absence of project-specific definitions and standards for what constitutes expertise and capacities, or even an UNCTAD wide definition of these terms to the best of the evaluator's knowledge, the definitions cited by UNDG and UNDP were considered relevant. The UNDG document 'A collective approach to Capacity Development' cites Capacity as the ability of people, organizations and society as a whole to manage their affairs successfully, and capacity development as the process whereby people, organizations and society as a whole unleash, strengthen, create, adapt and maintain capacity over time.¹⁵ UNDP uses a modified version of the same. 'Capacity is the means to plan and achieve, and capacity development is the process through which individuals, organizations and societies obtain, strengthen and maintain the capabilities to set and achieve their own development objectives over time.'¹⁶ In relation to its interventions, UNDP applies the **criterion of transformation** to define capacity development: for an activity to meet the standard of capacity development as practiced and promoted by UNDP, it must bring about transformation that is generated and sustained over time from within.

¹⁵ www.un.org/en/ecosoc/qcpr/pdf/sgr2016-deskreview-capdev.pdf A.Bester

¹⁶ Source: UNDP Primer on Capacity Development

54. In case of the 1415M, the relevant interpretation would be the **transformation of productive capacities** of fisheries sectors, to attain **more competitiveness in trade and market access**, through effective export development and diversification strategies; improving and upgrading national food safety standards; and compliance with international (target market) standards. In all this, there is a need to recognise the distinction between and collective influence of individual and institutional capacities, and intellectual (knowledge and skills) and physical (infrastructure and assets) capacities. From this perspective, the 1415M focus has been mostly on individual knowledge development of a few nominated anchor beneficiaries. However, transforming the sector would require, beyond attainment of knowledge and expertise, their application of knowledge and expertise into effective policy actions, transformative investments in physical and institutional infrastructure to meet required standards and developing market-linked value chains that realize the economic and social development potential of the sector.

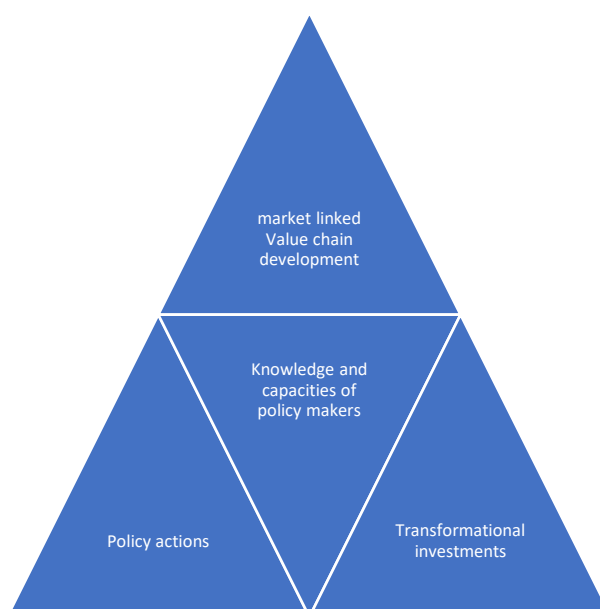


Fig 1. Interlinked investment areas for competitive development of fisheries sectors

55. Another qualification of the expected accomplishments relates to the scale and magnitude of coverage of the project. The project focused on **anchor beneficiaries**: senior persons in key positions in national governments and fisheries institutions, being in positions to inform and influence policies and regulatory actions for the fisheries sectors in their countries. However, EA's target recipients – governments and private sector – represent large constituencies that are far bigger than the limited number of individuals (two to four people per country in each training workshop) directly touched by the project. Thus, the scale and scope of the project are considered too small in relation to the likely scale of coverage required to include a critical mass of stakeholders and practitioners (for instance, fisheries administrative bodies and officials at the district and province level, quality control institutions, and processing industry practitioners).

Specific actions by participating countries for upscaling and further propagation of the knowledge acquired by beneficiary participants to their peers and other stakeholders are not evident or clear.

56. With the above qualifications, the project's expected results are to be seen mainly in terms of the increase in knowledge and capacities of the participants to contribute toward: improved formulation of policies and strategies; improved implementation of trade-compliant and competitiveness enhancing standards; and improving market compliance of products for trade. To this end, the project's activities were sequenced logically: beginning with country-level sector assessments to identify challenges, constraints and opportunities; consultations and formulation of sector and cross-sector policy actions; and outlining strategic investments to unlock the sector's potential for trade and development. The training activities were designed reflecting this progression, with field trainings coming up in the later stages of the project.
57. The national, regional and inter-regional workshops, which aimed at building the knowledge of policy makers, practitioners and experts on several areas that are key to developing sustainable and competitive fisheries sectors. In all, UNCTAD delivered 5 national workshops, and three regional workshops (one in Asia, two in Africa) each one week in duration. The trainings covered a mix of policy and institutional aspects, covering sustainable production, competitiveness, standards and market access, and value chain approaches to sector strategy development.

EQ. Is there evidence that the beneficiaries' knowledge, understanding and capacity to prioritize, develop and manage policies and national standards have been improved?

Finding 6: Participant self-assessments from the national and regional workshops, and the evaluation's first-hand observation at one regional workshop provide preliminary evidence of increase in beneficiaries' knowledge, awareness and understanding of a number of issues that contribute to trade competitiveness of fisheries sectors. However, the transmission of this knowledge into capacities to manage the sector at a national level cannot be inferred to lie within the project's ambit. However, there is some evidence from countries of the uptake of knowledge from the project, which is the closest proxy for capacities the evaluation could consider admissible.

58. According to the project progress report, in all, the project trained 500 experts, including 160 women in its national and regional workshops, besides facilitating 27 participants for a three-week study tour to China. However, the regional workshops in Mauritius and Vietnam had a more structured and intensive training contents than the national workshops, which were focused more on identifying the challenges and constraints of the fisheries sectors. Based on the workshop participant surveys, excluding the last workshop in Mauritius in May 2019, a total of 271 persons answered the survey, representing less than 70% of the numbers cited in the project progress reports. The regional workshops in Vietnam and Mauritius received 29 and 54 participants respectively. Including the final workshop, the number is likely to be around 125 experts.
59. While the project aims at improving knowledge, expertise and capacities, the project did not outline or conduct any formal assessments of knowledge and capacity increases: it relied only on participants' feedback as to the usefulness of the training contents. Besides the absence of any

assessment processes in the project design, the evaluation notes practical challenges in the formal testing of capacities in the project. One, the translation of knowledge into policy actions is not immediate, and manifests over a longer time frame, under dynamic conditions. Two, UNCTAD and 1415M are not the only channels for knowledge acquisition. The evaluator was specifically informed of several technical cooperation programmes in Uganda, linked to the country's efforts to access EU and US markets. These covered upgradations of quality control infrastructure, industry level certification on HACCP and food safety issues (UNIDO supported), and market access support interventions. Similar interventions were also reported underway in Myanmar. These bring challenges of attribution of capacity increases linked to the 1415M. Three, knowledge is only one element in the transformation of capacities and needs to be followed or complemented by investments in systems, institutions and physical capacities, besides application of expertise. The project's limited scope as a UNDA instrument could not have addressed these aspects. Four, formal capacity testing of delegates who are senior officials nominated by their governments, can be sensitive, especially if these are not clarified or agreed upfront.

60. In the absence of appropriate definitions and process outlines for measuring knowledge and capacity improvements, and given issues of attribution, the evaluation used a **rationale of knowledge uptake as a proxy for improved capacity** to arrive at some conclusions.¹⁷ In this regard, the evidence consisted of: quality of contents - training materials and experts; a first-hand observation of participants interventions at the regional training workshop in Mauritius in May 6-11, 2019; and feedback on policy actions initiated in participating countries based on delegates' participation in the project.
61. **Quality of training materials and expertise.** The training curriculum in the project aimed to serve the simultaneous needs of two types of stakeholders: a. policy makers in fisheries, environment and trade; and b. technical practitioners in areas of fisheries governance, management, value chain development, food safety and quality standards. The training sessions have been delivered by representatives of organisations that specialise in different areas that are collectively relevant to the development of strategies and sector plans and enhance competitive market access for LDCs. The presenters consisted of experts from various specialist international institutions: FAO, UNIDO, IMO, MSC; besides national experts and officials from the host countries, and two academic/industry experts from Vietnam and the US. The contents of regional workshops were complementary and well-sequenced, leading to progressive increases in knowledge of participants who (by design) attended multiple workshops. Table 2.

¹⁷ These proxies are also used in the results chains of other UN agencies, such as FAO (which the evaluator is specifically conversant with): The progression in uptake of FAO's products/services aimed at incorporating food security and nutrition objectives and gender considerations in sectoral policies, investment plans and programmes is a proxy for "improved capacity".

Table 2. Course Outline of Regional Workshops in Vietnam and Mauritius

| Vietnam | Mauritius |
|--|---|
| The Environmental, Social and Economic Role of the Fisheries Sector: Development Potential of the Fisheries and Aquaculture Sector | The Environmental, Social and Economic Role of the Fisheries Sector: Development Potential of the Fisheries and Aquaculture Sectors <i>Ocean Science for sustainable development: Experience from Mauritius</i> <i>International trade, demand and supply trends</i> <i>Role of developing countries and LDCs as exporters and importers</i> |
| Standards and Quality: Need for Integrated Quality Infrastructure and Institution Building | Fisheries management in the context of 2030 Agenda for Sustainable Development |
| Managing Fish-stock, Overfishing and Combating Illegal, Unreported and Unregulated (IUU) Fishing | Biodiversity, coastal protection and resource endowment <i>Policies for fish-dependent developing economies</i> <i>Ocean Health Case study</i> <i>Indicators and indices for measuring ocean health</i> |
| Harnessing the Potential of Aquaculture for Export Diversification | Harnessing potential of marine resources: <i>Experience of Vietnam</i> <i>Experience of Mauritius</i> <i>Role of IMP in safety of fishing vessels</i> |
| International trade, demand and supply trends: The trade and development potential of the fisheries and aquaculture sectors | Value chain theory and practice <i>Case studies on fish and shrimp value chains Vietnam</i> <i>Mauritius experience: role of private sector in promoting value addition for fish and fishery products</i> |
| Market Access, Subsidies and Non-tariff barriers | Standards and quality- integrated quality infrastructure and institution building <i>Role of competent authority in improving international food quality and safety standards</i> <i>Challenges and opportunities for southeast Asian and African countries in meeting international food quality and safety standards</i> |
| Seafood Technology and Safety for Export Diversification and Sustainable Development of Developing Countries in Africa and Asia | Managing fish stock, over-fishing and combatting illegal, unreported and unregulated fishing <i>Challenges facing developing countries in sustainably managing fishery stocks and controlling overfishing.</i> |
| Environmental Certification challenges, opportunities and prospects for weaker players | Policies and measures to raise productivity of aquaculture through improved fish seeds and feed |
| The social dimension of the fisheries sector | Environmental certification challenges, opportunities and prospects for weaker players <i>Role of Marine Stewardship Council and the MSC standard as a framework for improvements in seafood sustainability</i> |
| | Best practices for value addition along fisheries and aquaculture value chain |

Source: Workshop Outlines of Vietnam and Mauritius Regional workshops.

62. Besides the delivery of training sessions, the project also developed a number of knowledge products, in particular, training manuals covering a range of subjects that collectively contribute to harnessing the potential of fisheries and aquaculture. Two such manuals perused by the evaluator were: '*Harnessing the Potential of Fisheries and Aquaculture*' and *Fish Exports training manual*. The key contents of these manuals were also presented by experts during the inter-regional workshop May 6-11, 2019 in Mauritius. The manual on '*Harnessing the Potential of*

Fisheries and Aquaculture is organized in five parts: the multidimensional (economic, social and environmental) potential of fisheries and aquaculture; fisheries management to restore productive capacities of oceans and sustainable fisheries; potential of aquaculture to sustain food and nutrition security, economic growth and environmental protection; best practices for value addition along fish and seafood value chains; and standards and certification in international fish trade. The *Fish Exports* training manual consists of four parts: importance and potential of upgrading and diversifying fish exports from LDCs, including the challenges posed by standards and regulations on fish safety and quality; an overview of relevant international, national and private standards and tools for compliance; an eight-stage process for formulating and implementing policies and actions to upgrade and diversify exports; and an annex of tools (SWOT analysis, value chain analysis, etc.) and market information on the four largest fish importers (China, EU, Japan and US).

63. **Market based approach- Value Chain Analysis:** The 1415M also emphasized the effectiveness of a market-based approach using Value Chain Analysis, to inform strategic choices for policy and sector development policies in different contexts. These approaches can help in rightly positioning of the fisheries sector in a relevant market, which could be national, regional or international, and an assessment of state of competitiveness at various points of the value chain and identification of the most beneficial entry points to guide strategies and policies based on the available resources and productive capacities. A systematic value chain approach applied over a long-term horizon was highlighted as the key to success for both Vietnam and Mauritius in export-based fisheries and aquaculture. The illustrations of tuna, catfish and sturgeon value chains presented the effectiveness of the approach under different contexts and with different resource profiles. Box 1.

Box 1. Sturgeon value chain Vietnam case study

Vietnam's case study on the development of the Sturgeon Value Chain in the mountainous Lam Dong province an interesting example of a systematic approach to value chain development around a niche product.

Vietnam's intensive shrimp and catfish aquaculture models call for huge requirements of flat terrains, and thus, not feasible in the mountain areas, such as the Lam Dong province in the south of Vietnam. Livelihood opportunity assessments in the region led to the identification of sturgeon, a high value fish that thrives in high altitude, and has a huge demand as a specialty product, as a potential commercial opportunity. Studies indicated that if successfully farmed, it would be able to effectively compete against Chinese exports, as the Vietnam sturgeon was found to be much better quality.

Farming models were developed in consultation with aquaculture research centres in the university, and a proper value chain was developed: high quality breeding stock; feed development; good production practices; production cost controls; community owned brand development (Lam Dong); and premium restaurant supply contracts.

Sturgeon production grew steadily by 18 % per annum from 2008 and then spurted to more than 26% since 2012, The Lam Dong province produces close to 1000 tons annually, which is around 90% of national sturgeon production. Meanwhile, with scale and improved practices, costs came down by 15% and profit margins improved by over 35% in recent years. Overall, all elements in the value chain have benefited, with

a fair balance of profit margins along the value chain. Now the sturgeon from Vietnam is readying to compete in China, reversing the flow of trade in a product that came from China initially.

The example demonstrates the potential of value chain analysis and long-term planning to create sustainable commercial and livelihood improvement opportunities in less developed regions.

The partnership between local communities, private sector, provincial government and academia is seen as a key factor in the success of the sturgeon.

64. **Biosecurity and invasive species governance.** An important new element introduced in the Mauritius workshop (May 2019) was biosecurity, especially the impact of invasive species. The rise of commercial cruise tourism, and the privatisation include foreign enterprise in capture fishing has highlighted the risk to ecosystems from the discharge of alien pests and microbes through human and process waste, and from the introduction of new exotic strains for commercial breeding, whose consequences are indeterminate in the short term. Thus, biosecurity of national fish stocks is an important regulatory issue that links to commercialisation of the ocean economy in general and fisheries sectors in particular. In these deliberations, concerns were also shared of the implications of foreign entrepreneurs intending to introduce high yielding exotic (Asian) species in Lake Victoria, which highlighted the LDC's challenges in developing appropriate scientific testing protocols to safeguard biodiversity and ecosystem balance from such insertions.
65. **Fisheries Improvement Programmes as development compacts:** The 1415M training contents, rather than presenting an ideal situation or a specific aspirational state as the goal for all countries, presented a mix of key elements that could be implemented all at once or in a pragmatic sequence based on country specific contexts and resource readiness. Thus, sector development interventions can be formulated in the form of **Fisheries Improvement Programmes** (FIPs) with a limited or specific focus based on immediate challenges and available resources. Thus, in countries with poor processing infrastructure, limited institutional capacities and market linkages, FIPs could focus on stock replenishment and governance issues in the first instance and gradually add value addition and market access. In some, FIPs could look to support an investor friendly industrial fisheries sector focusing on processing, quality and food safety, with foreign investment and technical support. Others in more advanced states of competitiveness could look higher value market penetration through segmentation, traceability and certification systems. These present concrete 'bite-sized' actions that could be considered for development support, while serving as building blocks of long-term strategies for exports.

Box 2: Evaluator's First-hand Observation: Inter-regional workshop, Mauritius, May 2019.

The evaluator experienced first-hand the inter-regional training workshop in Mauritius (the last in the series of workshops in the project) and interacted over a five day span with participants from Bangladesh, Comoros, The Gambia, Haiti, Sudan, Madagascar, Mauritius, Mozambique and Uganda, besides the expert presenters from the Regional Centres of Excellence, Vietnam and Mauritius. The salient observations on the workshop are summarized below.

Relevance of topics selected

The workshop covered a wide range of topics: the concept of ocean economy (beyond fisheries); sustainable fisheries development – policies and practices; market and value-chain approaches; sustainability and governance- the concept of ocean health index; fish safety, quality, and market requirements; ecolabelling and certification. Collectively, the topics represented a well-rounded coverage of policy and technical/operational level issues of interest to policy decision makers and industry practitioners.

Profile of participants

The nominated participants were mostly two officials from the Ministry of Fisheries from each participating country, with responsibilities covering Quality and Food Safety, and broader governance and policy making areas, including monitoring of fish resources. Mauritian participants consisted of a wider mix: policy makers, technical personnel in several areas of fisheries management, competent authority officials, and academia.

Complementarity with previous workshops

Participants who had attended previous regional workshop in Vietnam cited the complementarities and continuities between the contents of the Vietnam workshop – which focused extensively on production best practices – and the Mauritius workshop – which focused more on the institutional and governance aspects, including stock management, certification and ocean health measurements. This enabled a more comprehensive learning rather than duplication of modules.

Expertise of Presenters and Quality of presentations (ease of understanding)

The presenters included technical experts from government, industry, academia and senior officials from international agencies specializing in different areas: Value chain analysis; standards and market access; fisheries resource management and replenishment; sustainability certification; environmental governance; and application of international covenants and agreements. While all subjects were not of immediate and direct relevance to all participants in their present responsibilities; they expanded the technical knowledge in a spread of relevant areas, thus improving the appreciation and potential for coordination across several areas, for successful outcomes in their sectors.

Sharing of country practices and experiences

For participants from LDCs, it was a major opportunity to learn of the successful experiences of Vietnam and Mauritius in developing internationally competitive fisheries sectors. The contents provided an understanding of the pathways for progress and the key steps to be implemented in their sectors/ countries. Vietnam's success in building a large and inclusive shrimp and catfish export sector with an enormous market diversity (reaching over 100 countries) is of particular interest for policy makers and industry practitioners in how to put a strong partnership model. Bangladesh's trajectory as an LDC also offered a number of lessons to other participants.

Daily group exercises for summarizing key takeaways and lessons (best practice)

An important component of the workshops were the several end-of-day group exercises, which saw the participants review the lessons learned from the sessions and contemplate potential actions and takeaways for their respective national policies and other actions to improve their fisheries sectors. The exercise, which solicited answers to two or three key questions, not only refreshed the key messages from the various sessions, but also presented a clear assessment of progress in each participant's understanding and practical application of the topics. This is considered a good practice that can be incorporated in future training workshops.

Field visits

Participants visited the Albion Marine Research Centre, the Mauritius Oceanography Institute and the Blue Bay Marine Park. Unlike Vietnam, these field trainings were not on practical demonstration of harvesting and post-harvest processes, but more on the systems and infrastructure that will be necessary for sustainable management of the ocean economy. The Mauritius field visits were cited as a useful complement to the fish production techniques learnt in Vietnam regional workshop.

66. **Knowledge of anchor beneficiaries.** With governments nominating senior officials to attend multiple workshops, the project sought to strengthen the institutional knowledge and capacities, through the participating officials, who were expected to apply the knowledge into policies and practice. As observed first-hand, the delegates attending the Mauritius training work shop included: a deputy Permanent Secretary (the Gambia), Directors of Fisheries (Sudan, Uganda, Madagascar) senior officials in Vessels monitoring and surveillance (Comoros), and District Fisheries Officer (Bangladesh), which are senior policy making positions in their respective governments. The evaluator learnt from delegates from Uganda, Bangladesh and Madagascar that upon return from trainings, they were required by their superiors to submit detailed reports on lessons learnt and listing proposed policy actions and technical measures in areas under their jurisdiction.

67. **Beneficiary Feedback.** The project did not have a formal independent capacity testing tool, and the demonstration of capacity through application of the knowledge gained can only be seen in what policy actions and regulations ensue over time. As a standard practice, UNCTAD conducted a participant survey at all the national and regional workshops to gauge the usefulness of the training modules. The survey questions were the same, thus allowing for aggregation. In surveys carried out after the workshops, an analysis of the responses of 271 respondents from 7 workshops¹⁸ revealed the following: Around 76% of participants noted that the trainings helped to improve their understanding of international standards and the socioeconomic role of the fishery sector in their respective countries.

¹⁸ Survey data was provided for workshops in Cambodia, Mauritius, Mozambique, Myanmar, Uganda and Vietnam. Responses from the Regional workshop in Mauritius May 6-11, 2019 are not included.

Table 3. Workshop participants' survey on workshop quality and utility

| Surveyed aspect | # of Responses | Very low/Low (score 1-2) | Medium (Score 3) | High/Very high (Score 4-5) | High/Very high (%) |
|-------------------------------------|----------------|--------------------------|------------------|----------------------------|--------------------|
| Content (quality) of presentations | 295 | 3 | 11 | 281 | 95.2% |
| Relevance of workshop to work areas | 294 | 4 | 29 | 261 | 88.4% |
| Usefulness of discussions | 292 | 1 | 28 | 263 | 89.1% |
| Usefulness of group activities | 230 | 3 | 33 | 194 | 84.3% |
| Duration of presentations | 293 | 10 | 61 | 222 | 75.2% |

Source: Workshop Participant Questionnaires, analysed by evaluator

68. The surveys also received a number of qualitative observations, especially regarding the most useful parts of the trainings, the strengths of the workshops, and areas to be improved. A tabulation of these responses showed that

Table 4. Workshop participants' observations on various aspects of contents

| Surveyed aspect | Aspects cited by respondents | | | |
|--|--|--|---|--|
| Particularly relevant parts of workshops | Aquaculture value chain analysis and opportunities- seed, feed quality | Resource management – stock assessments, legal enforcement, environment, inspection and controls | Market access, standards and food safety regulations | Action matrix for sector development Eight-stage process for export diversification |
| Strengths of the workshops | Expert/ knowledgeable presenters and facilitators | Knowledge and experience sharing among countries (esp. Vietnam success story) | Field trips | |
| Areas to be improved | More specific details in case studies | Develop country-specific policy recommendations | Reduce presentation length; More discussion time; Font size of slides | More field trips and practical sessions |
| Special comments and suggestions | Translations into other languages | Partner with research and training institutions to build further capacities | | |

Source: Workshop Participant Questionnaires, analysed by evaluator

69. **Letters of appreciation.** The workshops led to increase in the knowledge of participants and a widening of perspectives on approaches towards sustainable development of fisheries sectors. Besides the first hand feedback collected by the evaluator during the Mauritius workshop, UNCTAD also received several testimonials from officials from the participating countries. The government of Comoros expressed appreciation for the project formally, and cited policy actions being initiated based on the project. Copies of the letters of appreciation appear in Annex 4.

"The workshop went very well with highly qualified and professional performance and we have learnt a lot and gained a lot of knowledge and experience from the experiences of other participating countries", Director of Fisheries, Cambodia.

"the workshops and the Manual provided national stakeholders ample opportunities to build technical knowledge and awareness about international food safety and quality standards as well as the challenges facing the fishery sector and the development potential the sector holds for countries such as Mozambique". Deputy Minister, Mozambique

"...gratitude to UNCTAD for undertaking extensive activities in support of the fishery sector which is timely given Uganda's ongoing process in reforming the relevant rules and regulations related to fishery production and export". - Ugandan Commissioner for Fishery Administration "

"Different presentations and deliberations during the workshop were very useful in building our capacities in scaling up our fisheries exports" - Deputy Director General of the Myanmar Fisheries Department

B.4 Sustainability

EQ. Is there evidence that beneficiary countries are committed to continue working towards the project objectives beyond the end of the project? Specifically, are beneficiary country stakeholders likely to take actions to develop or improve policies and national standards, and to upgrade and diversify the fish exports? Have there been catalytic effects from the project both at the national/regional levels, and within UNCTAD?

Finding 7. Given that the project has just completed its activities, an assessment of changes produced by the project already at this stage is infeasible. However, there is emerging evidence that the participant countries are using or intend to use the knowledge and awareness gained from the project in policy actions or administrative regulations to improve the state of fisheries in participating countries. The project has generated a surge in demand from several LDCs for supplementary support to implement actions that have been identified as a result of participation in the project.

70. **Policy initiatives to improve the performance of the fisheries and trade sector.** Although the evaluation could not find evidence any integrated action plans based on the learnings of the project, interviews with respondents revealed mentions of a few initial steps in this regard in four of the target countries, besides Madagascar, as presented in Table 5. Also, the regional workshops, in which several delegates were from other than project countries, generated interest in supplementary requests for policy assistance and technical cooperation, which are beyond the scope of the 1415M.

Table 5. Indications from country representatives of actions taken based on project activities

| | |
|------------|---|
| Cambodia | Ministry of Agriculture Forestry and Fishery has taken steps such as: updating Strategic Framework for Fisheries (2015-2024); Improving boat registration and licensing systems; Revision of fisheries laws; (iv) and Development of a National Plan of Action against IUU Fishing, based on assessment of fishing capacity and IUU fishing in EEZ and high seas. |
| Comoros | Comoros, whose primary revenue from the sector came from fishing agreements with the EU, a decision was taken not to renew the fishing licence agreement with EU, thus paving the way for more value addition in the country. In advanced state of progress are regulations mandating that all fish caught in Comoros waters should land at Comoros fish landing points. To ensure the health and food safety, the government is formulating appropriate investments in landing point infrastructure. |
| Mozambique | Exposure gained from the project was cited as being useful in the revision of the sanitary control regulation for products of aquatic origin, specifically in these aspects: accommodating biosecurity issues in aquaculture and sanitary control of live aquatic animals; introduction of new concepts to strengthen risk management, transparency and impartiality in governance of the sector. Specific attention has been given for control of animal feed, and sanitation surveys and zoning of bivalve mollusc sites to contain contamination levels. Mozambique has taken important steps to develop a domestic aquaculture sub-sector, and established a taskforce consisting of key ministries, the private sector and civil society to develop a model for developing the aquaculture sector. |
| Madagascar | Knowledge acquired from the project helped to formulate the Madagascar Emerging Plan (PEM) outlining export development and diversification strategies to tap the potential of the fishery sector. The plan has eight elements, including: upgrading of fishing arrival infrastructure; professionalization of artisanal sector through sea fish cage culture practices; co-management system for preservation of the marine and coastal environment and sustainable re-generation of fish stocks. |
| Myanmar | Myanmar expressed interest and commitment to ... to establish National Research and Development Centre dedicated to the fisheries sector and proposes to set up a technical laboratory with development assistance. Assistance from Netherlands is expected in this regard. |
| Uganda | Uganda has expressed an interest to ... in adjusting its domestic food safety standards |

Source: UNCTAD reports, confirmed by evaluator interviews with delegates.¹⁹

¹⁹ <https://twitter.com/twitter/statuses/920890990596165632>
<https://twitter.com/twitter/statuses/920728938028126209>
<https://twitter.com/UNCTAD/status/920233053976440832>

71. **Evaluator observations at End-of-Day Group Discussions.** The evaluator’s opportunity to attend the week-long training workshop in Mauritius provided a valuable first-hand feel of the utility of the trainings to the project’s beneficiaries and also the opportunity to assess (albeit preliminarily) the uptake of knowledge into potential policy actions. A more direct experience of the improvement in participants’ knowledge evidenced in the Mauritius workshop was the systematic use of ‘End of Day’ reflective sessions moderated by UNCTAD staff, which required all delegates to participate in groups to discuss answers to questions that were based on the topics presented. While each group was represented by a rapporteur, each delegate was also required to speak about her/his perspectives and implications for her/his country. The quality of interventions made each day helped distinguish the more progressive learners and also track the improvements in each participant’s interpretation of the issues discussed. This feature of the workshop can be considered a good practice for other projects as well. Examples of questions debated by delegates in groups included:

- What corrective measures would you propose to arrest the deterioration of ocean health index in your country?
- What are the lessons emerging from Vietnam’s case study in fisheries value chain development? What success factors did you observe, and what policy measures would you apply in your country?
- What are the key challenges to managing fish stocks in your country? What measures would you propose to strengthen governance?

72. These end-of-day sessions were the main immediate evidence of the potential use of the knowledge received in workshops into identification and implementation of measures to address specific national challenges. The evaluator’s observation was that at least 60 percent of the delegates were able to interpret the key messages sufficiently and articulate national actions and measures based on the lessons learnt. Also, the evaluator’s interviews with some respondents indicated adequate levels of knowledge and decision-making capabilities. An illustration of the same is summarised in Box 3.

Box 3. Public and Private sector perspectives-Uganda

The evaluator’s interview with senior officials of the Fisheries Department and also a senior official of the Uganda Fish Processors and Export Association provided useful insights into the specific value brought by the 1415M to a country that has been a leading export of fish from East Africa in the past and is a beneficiary of the EU ACP agreement.

Uganda’s lead position in East Africa

Uganda is ahead of others in the region in the fisheries sector and has a strong fish processors association as the node for industry-oriented activities. The association, formed in 1997 was proactive to access the EU

<https://twitter.com/DelelegnMussie/status/849178811971371008>

markets, and attracted funding for exports, and was instrumental in the regulations for development of the Competent Authority. There are other projects in Uganda, all involve the association, with many financed with donor support. They all aimed at enhancing compliance with the EU and US markets. One of the most important was a UNIDO programme, in which 10 large factories were trained and implemented HACCP and ISO, and all were certified as a group. In another programme, CBI Netherlands funded market access initiatives: in the 2000s, they supported our association to market Nile perch in international markets- funding our participation twice in Brussels, including preparation of stalls materials.

Industry structure: Only the few large factories can access high value markets. The others – SMEs – remain challenged by high costs of investments leading to international certification for private standards. Thus, their supplies are suitable only for local and regional markets. Also, the SMEs have not organised themselves in an association. Uganda is formulating a licensing regulation under which every operator across the fisheries value chain must belong to an association to be licensed.

Challenges

The two main challenges are: stock restoration and improving net price realization.

Stock depletion: Overfishing and use of inappropriate methods has led to a depletion of fish stocks, and reduced market opportunities. As a result of low stocks, 16 of 22 export processing factories had to close down. Now, with the resource recovering, the factories are reopening; presently there are 12 operational factories. All exports to EU and US are only from these factories.

Market prices: The biggest challenge still remains direct access to high value markets. The lion's share of margin is lost because we supply to intermediaries. We also need to adapt to buyer requirements, and supply in smaller packs instead of bulk packs of 3-6 Kg. Intermediaries repack and rebrand in small consumer packs and are able to mark-up the price by thrice. We also need to highlight the uniqueness of Nile perch, which is unique – there cannot be any NP from any other part of the world.

Distinctiveness of the UNCTAD project

The project looks at technical capacity building towards compliance with market requirements, standards and regulations, and SPS requirements of EU, US, and Gulf markets. The project was well packaged. It is anchored in findings from national and regional workshops, and the programme contents responded to challenges identified. The programme content in Vietnam focused on the ground, on real challenges and issues, value chains and aquaculture. It would be good for the Centres of Excellence to develop a standard curriculum syllabus based on the UNCTAD project, for replication and continuous training even after the project ends.

Specific benefits from the project

In our association, with the knowledge gained in the UNCTAD project, we are reviewing our self- monitoring guidelines. Already, we no longer accept small fish in our factories. Also, Uganda's national fisheries policy is under review, based on lessons from the UNCTAD workshop.

To maximize impact: Given that only few delegates can be accommodated in these workshops, there should be a system for sharing the info further with national stakeholders after the workshop; perhaps by creating a repository of all the training sessions for online consumption.

Opportunities: Ecolabelling, Geographic Indications, Market Support Forum

The Nile Perch is unique to the subregion and a good candidate for obtaining Geographic Indication (GI). Ecolabelling is another important emerging need, but as the source Lake Victoria is common to three countries, there is a need to work through the Lake Victoria Fisheries Organization. Uganda is in a position to lead the sub regional approach as our association is the most active, compared to Kenya and Tanzania. There used to be a regional association – EA Proc and Exp Assn, which is now inactive, due to lack of funding.

Along the above lines, UNCTAD could also support promotion of indigenous and unique fish species of LDCs, which have some unique, highly nutritious and medicinal fishes that can be sold in high value markets. For all this, it is important to build national expert networks like in Vietnam.

Another area to be considered is to create a **common market support forum** that connects buyers and exporters, provides market access support out of key destination markets. This could be set up in form of a liaison office of the exporter associations or created within the trade section of diplomatic missions.

73. **Post-project reports for EA 1 and EA 3.** Given the impracticality of policy actions flowing immediately from the project activities, there are challenges in measuring EA1 and EA3 within the project duration. To have a clearer view of proposed actions based on the project, one pragmatic option would be for UNCTAD to seek from participating countries: a report outlining major policy actions being considered for export development and the strategy forward (IA1); and a report outlining further capacity needs of governments and private sector to comply with international sanitary and phytosanitary standards (IA3). These would reflect the extent of absorption and application of the knowledge acquired over the duration of the project through the series of workshops. In case there are residual funds from the project budget, a small preparatory grant could be provided to each participating country for this purpose.

Are there indications of potential impact for achieving the project objective of improved national capacities to upgrade and diversify fish exports?

Finding 8: The project's potential for impacts depends on follow up actions by governments towards: formulation and pursuit of definitive policies and action plans; institutional structures for capacity development; and financing /investment mobilisation. The project has created a base of evidence and knowledge to embark in follow-on interventions, however the need for additional technical support and investment support would be necessary, from UNCTAD besides other partners and donors.

74. As per design, a one-off DA project is not set up for sustainability by itself. Sustainability aspects in this case relate to the formulation of definitive policies and action plans formulated by participant countries; support to institutional structures for continuance of knowledge and capacity building; besides financing and investment mobilisation for anchor interventions; etc. In this regard, some elements of the project offer prospects for sustainability but need to be developed further, which is beyond the scope of the project. However, continued interest by participating countries with the support of UNCTAD and other development partners can create continuance of the areas identified in the 1415M towards improvement of fisheries sectors.

75. **Regional Centres of Excellence and Training Curriculum.** Following the completion of the initial project activities, there was clear demand by several beneficiary countries for continuing training and assistance in the field of fisheries development. With the UNDA policy of not funding follow-through projects, the continuity depends on other sources of funding to scale up or replicate the activities. In case of the 1415M, beyond supplementary funding, another issue is the institutionalisation of project's knowledge transfer mechanism. In this regard, the project's most important contribution towards sustainability is the firming up of institutional arrangements with

the UNCTAD established strategic partnerships and Memoranda of Understanding with Nha Trang University in Nha Trang, Vietnam, as well as with the Ministry of Ocean Economy, Marine Resources, Fisheries and Shipping of Mauritius. The two host countries were chosen based on their success in developing their fisheries sector, and the level of expertise and technology related to fisheries and aquaculture they have available for sharing with regional LDCs, besides their interest in south-south cooperation modalities. In this direction, the regional training workshops are being built as a formal curriculum comprising 8-10 modules, developed in consultation with: The International Organization for Standardization (ISO), the Marine Stewardship Council (MSC), the Royal Tropical Institute of the Netherlands (KIT), and Nha Trang University, Vietnam. Looking ahead, UNCTAD's vision is to develop a global cluster of Regional Centres of Excellence with having different expertise and pooling them to build comprehensive training and capacity development package in fisheries sector development approaches. These could also extend to areas such as trade specific issues, for instance, Geographic Indications for origins of special varieties of fish, for instance. While financing arrangements for future trainings will need exploration, the ready availability of a tested curriculum under the 1415M and the institutional arrangements finalised with Vietnam and Mauritius facilitate the prospects of funding similar programmes by donors and development partners, including through UNCTAD.

76. **Investment linkages.** Developing competitive fisheries sectors calls for sizeable investments in infrastructure and across the value chain. The project identified critical investment nodes across the fisheries value chain: transportation and storage facilities, energy infrastructure, certified laboratory testing facilities, and export certification systems. However, to realize the potential and overcome the challenges of the fisheries sector there is need for improving the development finance and investment policy environment and institutional frameworks, particularly, enhance participation of private sector impact investors, philanthropic foundations, families and high-net-worth individuals, besides development finance institutions. With the support of International Maritime Organization (IMO) and the Common Fund for Commodities (CFC), UNCTAD organized a brainstorming meeting on Impact Financing in the Fisheries and Aquaculture Sector in Structurally Weak and Vulnerable Economies, in London in 2018. Attended by representatives of development finance institutions, impact investors and environmental labelling organizations, the event focused on ways to attract more impact investment to the fisheries and aquaculture sector in LDCs. Using the knowledge from the project, food safety standards infrastructure and environmental certification were identified as pivotal common pool investment opportunities towards the expansion of markets and revenues, but beyond the scope of individual enterprises. The evaluation also learnt from participants from Uganda that the project facilitated introductions with Vietnamese fish feed manufacturers to explore investment opportunities for high quality fish feed production facilities in Uganda, which is challenged by low quality and uncertified feed resulting in low yields and profitability. The present status of these explorations is not known.
77. UNCTAD also has opportunities to present the project's encouraging results and the numerous requests for technical cooperation generated, for consideration by donor-supported programmes or under the EU-ACP, the Sweden-funded UNCTAD Trust Fund for Capacity Building in Investment, and others, besides for joint programmes by the UN Inter Agency Cluster.

78. **Public funding and development flows.** Other indicators of sustainability can be the formulation of enabling policies and increased magnitude of public funding, ODA and other investment flows. The evaluation could not examine this aspect due to lack of specific elements in the project addressing this aspect, except the brainstorming event in London. Government officials of Comoros and Madagascar interviewed by the evaluator mentioned that the project had contributed to formulation or strengthening of sector policies and strategies, and the investment phases had not yet begun. On the other hand, Bangladesh government officials mentioned the National Aquaculture Plan which obtained World bank funding of over USD 150 million, but that again could not be linked to the project.

B.5 Efficiency

EQ. Have project implementation modalities, and internal monitoring and control been adequate in ensuring the achievement of the expected outcomes in a timely and cost-effective manner?

Finding 9: The project has been implemented efficiently, with timely completion of activities and within budgets, adapted to unforeseen developments and opportunities swiftly. The mobilization of supplementary funding has been exemplary.

79. Assessments of efficiency focused on extent and timeliness of completion of activities and budgets utilized, adjustments made to respond to unforeseen developments, and attempts made to enhance the reach of the project through cost efficiencies and additional resource mobilization.

80. **Adjustments.** Overall, the project was implemented without any changes to the original design. The initial tentative list of project countries was Bangladesh, Cambodia, Comoros, Sierra Leone and Uganda. However, Sierra Leone was replaced by Mozambique based on the higher levels of interest shown and also the huge potential of the fisheries' sector and investment interest by Asian players especially China. However, the project also had to adjust to the withdrawal of Bangladesh,²⁰ replacing it by Myanmar, which is in the process of greater trade and economic integration into ASEAN and more generally into the international trading system.

Table 6. Status of Completion of Activities

| Activities listed in the Project document | Status |
|---|-----------|
| A1.1 Undertaking policy-oriented research and analysis on export development and diversification | Completed |
| A1.2 Five training workshops for national experts (one in each participating country) on ways and means of addressing the challenges facing each country in formulating and implementing diversification policies and export promotion strategies with a particular focus on the fish sector. | Completed |

²⁰ According to progress reports, Bangladesh withdrew on grounds that massive financial resources were being provided by USAID and FAO, and the project resources for national work shops were too little to have any impact. However, Bangladesh sent two representatives to the final regional workshop in Mauritius in May 2019.

| | |
|--|--|
| A2.1. Preparation of background material for training on improving national standards and in complying with international sanitary and phytosanitary standards | Completed |
| A2.2. Five national training workshops to train participants from various operators in the fish industry in countries covered by the project to sustainably address the challenges of meeting international standards in fish exports. | Merged with A 1.2 for cost effectiveness |
| A3.1. Inter-regional training workshop: The training workshop will bring together experts from Asia and African LDCs, participating in the project | |
| A3.2. Develop an operational tool / manual on improving national food safety or sanitary standards | Completed |
| A3.3. Study tour for experts from the five beneficiary countries to get hands on training in selected standards organizations or fish exporting industries in other advanced developing countries. | Clubbed into A 3.1 and supplemented with study tour to China |

Source: Project Progress report 2017

81. At the end of 2017, the project sought budget enhancements in view of new opportunities that were in line with the and had potential for strengthening impacts; also, some internal re-adjustments were made to activities based on evolving needs. The major activities for which additional funding was sought and obtained were related to the trainings organized at the two regional centres of excellence in Vietnam and Mauritius. The evaluation finds this readjustment practically justified on two accounts: one, it enabled UNCTAD to hold more workshops than originally planned; and two, the regional centres of excellence offered the potential for institutionalizing the trainings after the completion of the project, thus enhancing the sustainability of results.
82. Another adjustment was the logistical clubbing of national policy workshops and technical training workshops (activities A 1.2 and A 2.2) which enabled greater participation, dovetailing feedback from technical sessions to policy takeaways, besides savings in logistics costs.

Table 7. Project Budget Adjustments and Expenditures.

| Description | Budget/Allotment (USD) | Revisions (USD) | Expenditure (USD) |
|---|------------------------|---------------------------------------|-------------------|
| Other staff costs - General temporary assistance | 30'000.00 | -30'000.00 | 0.00 |
| Consultants and expert | 96'000.00 | +20'600.00 | 91'568.02 |
| Travel of staff | 60'000.00 | +72'000.00 +50'000.00 +2'837.26 | 184'933.62 |
| Contractual services | 8'000.00 | +6'000.00 | 4'145.20 |
| General operating expenses | 2'000.00 | | 179.10 |
| Supplies and materials | 0.00 | | 0.00 |
| Furniture and equipment | 0.00 | | 0.00 |
| <i>Workshops / Study tours (Grants and contributions)</i> | 400'000.00 | -68'600.00 -50'000.00 -2'837.26 | 272'159.43 |

| | | | |
|---|-------------------|--|------------|
| Total allotment | 596'000.00 | | 552'985.37 |
| Additional funding obtained from savings and remaining funds from UNCTAD closed projects especially 1415K | 255,775 | | |
| Additional financing funding mobilised | 145,500.00 | | |
| Total Funding | 997,255.00 | | |

Source: Project Progress Report 2017

83. **Supplementary resource mobilisation.** A notable aspect of implementation was UNCTAD's success in raising additional resources, which enabled increased beneficiary coverage and expansion of content. According to the progress reports, UNCTAD raised USD \$ 145,500, of which \$ 110,000 came from China, a major importer of marine products from developing Asian and African countries. The additional resources were used for: intensive three-week training and study tour for officials from three project countries (Cambodia, Mozambique and Myanmar) to the Freshwater Fishery Research Centre (FFRC) in Wuxi, China in 2016; conducting an additional training workshop in Uganda, and government-sponsorship of senior Comoros officials to Uganda for training on international standards. In addition, the project also raised USD 25,500 from the UNCTAD Common Fund for Commodities programme, and USD 10,000 from Government of Comoros. See Table 8.
84. The availability of supplementary funding also enabled a few additional activities not originally planned. For instance, UNCTAD used the opportunity of the United Nations Ocean Conference in June 2017, to conduct a side-event, showcasing country experiences of Cambodia (challenges in the fisheries sector) and Mauritius (success story in transformation of the sector) At the event, UNCTAD showcased the challenges facing Cambodia and the successful experiences of Mauritius. Also in 2017, UNCTAD, jointly with IMO, organised a brain-storming event on 'Impact Financing in the Fisheries Sector in Structurally Weak and Vulnerable Economies' in London, targeting the development financing institutions, private (impact) investors, and relevant multilateral institutions to identify opportunities for direct impact financing to the fisheries sector in LDCs and SIDS: replication of successful experiences and best practices in formulating bankable projects; risk mitigation through guarantee schemes for private impact investors; and private certification.

Table 8. Additional Resource Mobilization

| Donor | Amount Raised Cash/ in kind (USD) | Purpose |
|---|--|--|
| China | 110,000 | For travel and DSA of 27 participants to China Intensive training and study tour opportunities for three project countries |
| UNCTAD- Common fund for Commodities (CFC) project | 25,500 | To organize additional training workshop in Uganda |

| | | |
|---|--------------|--|
| Government of Comoros | 10,000 | For travel and DSA of 10 Comorian senior experts and officials to undertake study tour to Uganda – international standards |
| Total co-financing | \$ 145,500 | |
| Original Allotment | \$ 596,000 | |
| Additional allotment | \$255,775 | |
| Total project funding | 997,255 | |
| Co-financing`` as % of Original Allotment | 14.6% | |

Source: Project Progress Report 2017 and Project Extension Document

85. **Repeat participants.** Another indicator of efficiency considered by the evaluation is the selection of national participants for the various workshops. While participants were nominated by the respective governments, the project ensured continuity in the programme for two or three officials, who were seen as the primary recipients, with a responsibility to translate and apply the lessons into their spheres of work: policy making, resource governance, value chain development, and market standards compliance. Nearly all the participants met by the evaluator in the final regional workshop in Mauritius, had attended their national workshops, and at least one or more trainings in Asia. This resulted in a progressive learning, with taken that the workshops had complementary content modules building on previous workshops. For instance, the regional workshop in Vietnam had more emphasis on aquaculture practices with several on-farm sessions that were more useful to technical persons, whereas the regional workshop in Mauritius focused on broader value chain concepts and added new modules such as ocean health, sustainability certification and marine governance, which were more oriented to policy makers. Having a mix of both technical and policy practitioners ensured a broad exposure for both profiles, while allowing for deeper dive into areas of specific relevance for each.
86. **Inclusion of non-beneficiary country delegates.** While national focus was upon five countries, due efforts were made to secure the participation of several other LDCs in the regional training events. In all, the project covered beneficiaries from 16 countries²¹, as evident from the participant lists of various regional workshops.

B.6 Gender and Human rights

EQ. To what extent the design¹ and implementation of the project incorporated gender equality, and can evidence be identified in this regard? To what extent have the beneficiaries been sensitized on the integration of gender equality considerations in the policies and strategies relating to the fisheries sector and fish exports? To what extent does the project advance UNCTAD's efforts to promote equal access to jobs and reliable source of income?

²¹ Bangladesh, Burundi, Cambodia, Comoros, Djibouti, Ethiopia, Gambia, Haiti, Kenya, Madagascar, Mauritius, Mozambique, Myanmar, Samoa, Uganda, Vietnam

Finding 10: The incidence of women employment worldwide in the fisheries sector was featured in several analytical texts in the project. However, there is no evidence of explicit emphasis and advocacy of Gender and Human Rights approaches in the project's activities: programme contents perused by the evaluation did not delve on best practices toward gender equality and empowerment of poorer sections but rather subsumed them within the definition of the artisanal fishing subsector. Issues relating to the vulnerability of artisanal small-scale fishers were addressed as constraints to enhance productivity, accessing markets and compliance with market standards. The potential of advocacy to governments of the **global voluntary guidelines for small scale fishers and codes of conduct for responsible fisheries**, (developed by FAO, a contributor to the training content) could not be harnessed fully.

87. The UNCTAD publication under the project ²² cites some data from the World Bank (2010) that 47 per cent of those involved in fisheries worldwide are women, with wide variations across countries, for example 73 per cent in Nigeria, 72 per cent in India, 57 per cent in Cambodia, 32 per cent in Senegal, 19 per cent in China and 5 per cent in Bangladesh. Yet despite women's substantial and increasing involvement in fisheries in some countries, a lack of gender equality arises from traditional beliefs and customs and existing legal and regulatory barriers.
88. Within the project, due attention was given to the inclusion of women beneficiaries. According to the progress reports furnished by UNCTAD, in all 500 persons benefited from the training workshops, including 160 women. This was corroborated by a participant from Madagascar who had attended the regional workshops in Vietnam and Mauritius: according to her, one third (1/3) of the participants in Viet Nam were women. In Mauritius, however, there were only three women participants from LDCs, besides the training expert from Nha Trang University, Vietnam, although several women officials from various Mauritius institutions participated in the workshop, including as presenters. The evaluation also noted the large number of women experts and officials at the Albion Fish Research Centre and Mauritius Oceanography Institute, which demonstrate the potential for women employment in the fisheries and ocean sciences sectors to be emulated in other countries, although this is not a direct result of the project.
89. According to many participants contacted by the evaluator, coverage of gender issues was somewhat scant in the workshops: even though gender roles in the fisheries sector were recognised, the events did not have dedicated sessions on dealing with gender issues and consideration of good practices in participant countries. One consistent message on gender in the Mauritius workshop was the potential of the aquaculture sector – compared to the capture fisheries sector – to create economic and social empowerment of women, with the examples of Bangladesh and Vietnam mentioned a few times in sessions. However, there was no dedicated discussion or thematic session on gender-specific issues in the fisheries sector.

²² https://unctad.org/en/PublicationsLibrary/aldc2017d2_en.pdf

No. I think it should be more, because you know in Cambodia, the woman is a big role related to fisheries.

Not enough but contributed to some extent because this action is continuous. As the country has always prioritized gender issues, the project has once again reinforced the actions of these efforts being developed by the Mozambican Government.

Yes, I think that the Project have talked about it in Madagascar.

90. The draft Training Manual distributed at the Inter regional workshop in Mauritius mentions that including the post-harvest sector, which employs mainly women, around 59.6 million people are employed in fisheries (40.3) and aquaculture (19.3), over 50 percent of which are women. The post-harvest stages employ mostly women.²³ However, there is no further analysis of the issues that women in the fisheries sector experience differentially and what policies and supportive actions could be introduced to enhance the economic and social empowerment of fisher women.
91. Interestingly, Chapter 2 of the Training Manual titled *Fisheries Management in the Context of the 2030 Sustainable Development Agenda* focuses exclusively on SDG 14 as being a goal dedicated to 'conserve and sustainably use the oceans, seas and marine resources for sustainable development', and emphasises principles and practices to restore fish stocks and healthy oceans, to eradicate IUU fishing and eliminate harmful fishing practices and discipline subsidies in fisheries. Also, the inter-regional course in Mauritius included a dedicated session on the role of the fisheries sector in the context of the SDGs. However, it mentions Indicator 14.b: provide access of small-scale artisanal fisher to marine resources and markets, with emphasis on effective market access through overcoming non-tariff measures (NTMs). Chapter 3, 'Potential of Aquaculture to sustain food security, human nutrition and economic growth' refers to the strong political will of African leaders to make the sector particularly important for employment of youth, does not specifically address the potential for gender equality and women's empowerment, even though the higher share of women employment in aquaculture is a reality. However, linkages with 'people' aspect of the five Ps of the SDGs, especially SDG 8 (decent work) and SDG 5 (Gender Equality) are not explicit.
92. From a development perspective, gender responsive policies and action plans that recognise differentiated livelihoods implications for men and women are important for the sustainable and equitable development of fisheries sectors. These could manifest in a number of ways: promoting equal remuneration for men and women; support to women's groups for collective bargaining and standardization of rules and regulations; promotion of women groups' operated market infrastructure; supplementary training on quality assurance, market development and access to finance and enterprise development opportunities, to name a few. Some relevant policy aspects in this regard are:
- Inclusiveness: food security and livelihood security of small fishers as important features in national and sector policies

²³ Section 2.2 of the Training Manual, source; FAO, 2018a.

- Ring-fencing of small fisher folks' access rights to catch
- Sustainable fisheries management and ecosystem approaches
- Value chain analysis to identify opportunities better suited for women
- Prevention of child labour and promotion of decent working conditions

93. The workshops could have benefited from the inclusion of a session devoted to gender issues, conducted by another specialist organisation- whether a UN agency or a sector institution such as World Fish. A dedicated Gender Team at World Fish has built a number of case studies on the state of women in the fisheries sector, and these are important entry points for SDG 5 (Gender Equality) and an inclusive development approach to the sector. Several interesting analyses have been carried out by World Fish²⁴, resulting in important insights, such as:

Women are often engaged for work that is unpaid and unofficial; and represented disproportionately at the nodes of fish value chains; and in areas that are less-profitable than work done by men; women have far lower rates of entrepreneurship than men in fisheries activities.

Enabling women to fully engage in and benefit from aquaculture and fisheries can boost production, reduce poverty and enhance nutrition security for millions of fish-dependent households.

94. From a broader perspective of **attention to marginalized groups**, it is also useful to mention that FAO, besides being a leading technical agency in fisheries development, has been at the forefront of international advocacy for governance, through instruments such as the Code of Conduct for Responsible Fisheries and the Voluntary Guidelines on Securing Sustainable Small-scale Fisheries (VGSSF), which use human rights approaches towards the responsible and socially equitable development of fisheries. Greater attention to these normative aspects could have been included in the arrangements with FAO, besides the technical contents introduced by FAO experts.

B.7 Partnerships and Synergies

EQ. How has the project advanced partnerships with international development partners and national and regional counterparts, the civil society and/or the private sector?

Finding 11: The project partnered with a number of specialised international technical institutions, government agencies, academia and other non-profit organisations, for the development of content and knowledge delivery. Some of these arrangements have been institutionalised in the form of two centres of excellence.

95. In the progress reports, UNCTAD has mentioned 'partnerships' with several institutions, most of these are ones whose representatives have participated in the national or regional workshops

²⁴ World Fish publications perused by the evaluator can be found at:
<https://www.worldfishcenter.org/pages/why-gender-equality-matters-fisheries-aquaculture/>

and/or are ready to support future training activities. Mentions include: the Food and Agriculture Organization (FAO), the International Organization for Standardization (ISO), the Marine Stewardship Council (MSC), the Aquaculture Stewardship Council (ASC), the International Maritime Organization, the UN-ESCAP country offices (in Cambodia and Myanmar); UNDP country offices in all the project countries; EU as well as GIZ (Myanmar); Korea International Trade Support Centre (in Myanmar), the Chinese Freshwater Fishery Research Centre, and Save the Earth Cambodia (Civil Society), Mauritius Oceanography Institute.

96. The evaluation would like to distinguish between: institutional arrangements of partnerships based on a framework of cooperation; and event-specific collaboration through provision of experts, although UNCTAD includes both as partnerships. In the evaluation's view, the arrangements negotiated with the two Regional Centres of Excellence – Vietnam and Mauritius can be considered as meeting the requirements for institutional partnerships. The Centres in Mauritius and Vietnam have signed MoUs with UNCTAD to offer regular training courses for fisheries policy-makers and practitioners from regional LDCs and LLDCs.
97. The centres were aptly identified, for Vietnam and Mauritius are leading examples in their regions in transforming their fisheries sector to internationally competitive levels, and more so due to the willingness of their governments to share experiences and lessons learnt. These regional centres are instrumental for sustainability of the project's results, as they provide opportunities for continued learning and exchange of experiences on fisheries sector development, through replicating the regional workshop training packages for several other countries and adding new modules from time to time – with significantly lower involvement of UNCTAD than under the 1415 M project. There are also complementarities in the offerings of the two regional centres. While Vietnam is best suited for hands-on training on aquaculture value chains especially the production nodes, Mauritius is more relevant for training on institutional systems, monitoring and governance aspects, both being very essential for development of the sector. The evaluation learnt that UNCTAD plans to identify more centres in other regions, to eventually create a global network of regional Centres of Excellence, each specializing in some areas while complementing the others.
98. Other organizations too made important contributions to the knowledge and technical content of the project, especially in the training workshops. These include especially the Food and Agriculture Organization (FAO), the International Maritime Organization (IMO), the Marine Stewardship Council (MSC), and the Aquaculture Stewardship Council (ASC). Senior experts from these organizations conducted training sessions on complementary topics that collectively represented diverse and well-rounded training contents in the regional workshops.
99. On the other hand, the tangible contributions of some institutions cited as partners was not clear. For instance, the project description in the UNDA fascicle shows the project as a partnership between UNCTAD, UNECA and ESCAP, with the two regional commissions expected to provide technical and substantive support for the implementation of the project, drawing on their regional expertise. But the evaluation could not find any evidence of their involvement in the project activities or the research/analysis components, although the progress report mentions their role in mobilizing stakeholders. Similarly, the evaluation could not concretely identify the role and

contribution of UNIDO (Cambodia Office); UNDP country offices in all the project countries- which supported logistics and administrative aspects of the project; EU and GIZ (Myanmar); and Korea International Trade Support Centre (in Myanmar).

C. Conclusions

Relevance. The project rationale and design are highly relevant to the needs and challenges of LDCs and other vulnerable countries and aim at realizing the potential of their fisheries sectors by enhancing their competitive and beneficial integration in international trade and markets in an environment and resource sustainable manner.

100. The project draws on UNCTAD's mandate flowing from the Nairobi, Accra and Doha Conferences, the Istanbul Plan of Action for 2011-2020, and is well aligned with the intents of the UN Development Account projects in tranche- placing emphasis on capacity development of policy makers and sector practitioners and the exchange of practices among countries and regions. The project approach integrated economic, social and environmental aspects, with resource management and governance as cross-cutting priorities in the overall sector development planning. The target countries are appropriately chosen/ revised: their specific issues and challenges justify their participation in the 1415M; and have an enabling political and economic environment to implement the learnings from the project. Due revisions were made to the list of countries, based on assessments of potential for improvement based on the project's support. The project drew on UNCTAD's comparative advantage; its broader institutional expertise on structural constraints of LDCs and other vulnerable economies, and more particularly on UNCTAD's experience in trade related issues, such as the analysis of technical standards and non-tariff measures and their implications for effective market access for products from LDCs. UNCTAD complemented its specialist expertise through content partnerships with other organisations specialised in fisheries.

Effectiveness. The project contributed to its expected accomplishments in terms of adding to the knowledge of key actors in government and private sector from the participating countries: to formulate export development and diversification strategies; to improve national food safety standards and comply with international food safety and related sanitary and phytosanitary standards. However, the limited size and scope of UN DA projects in general cannot generate impacts at the sector level and need to be seen as catalytic rather than transformative. Change as described in the expected accomplishments can manifest only from translating the knowledge into policies and investments through a structured sequence of interventions.

101. The distinctive features of the project's knowledge transfer mechanism are its holistic approach and coverage of economic, social and environmental sustainability aspects of specific importance to the fisheries sector globally, and the emphasis on a competitive, market linked, value-chain approach to the sector. The knowledge contributed by the project is considerable

enough to initiate actions and articulate demands for more specific technical assistance and investment support to policy implementation and investments into critical public infrastructure and quality systems to enhance the competitiveness and acceptability of fish products from LDCs.

102. The project has provided a well-structured package of tools and guidance that can be considered building blocks for countries to embark upon sector development plans, outlining approaches for: value chain analysis, market segmentation, standards and certification, sustainable exploitation and resource governance. The size and scope of UN DA projects in general, cannot generate impacts at the sector level, and need to be seen as catalytic rather than transformative. Given the scale and duration of the project and the extant state of the fisheries sectors in the target countries, it is unrealistic to expect the translation of the project's outputs into impacts (in form increases in production, export volumes and incomes) within the scope and duration of the project.

103. The project has received very positive feedback from participants as to the scope, quality and usefulness of the activities. Participants' group deliberations around key themes indicated positive impressions as to the beneficiaries' knowledge and understanding of success factors to developing fisheries sectors and how different participants identified the key actions for transformation and capacity. The sharing of country experiences amidst different contexts also provided enhanced appreciation of the key factors behind success of countries that have transformed their fisheries sectors into key contributors of economic and social development. Requests for follow-on assistance have been made by some countries, for consideration by UNCTAD under other modalities. However, the potential for development of informal knowledge networks among participating countries beyond the project's activities remains underutilized. An important element of the 1415M design was the reliance on highlighting the experience of developing countries, which are more relevant for LDC contexts than the lessons from middle- or high-income countries.

Efficiency: The project demonstrated high degrees of efficiency in the timely and cost-effective utilization of resources, induction of specialist agencies for content delivery, and secured additional resources to expand coverage footprint. Activities were implemented according to schedule and within allotted budgets. Appropriate and timely adjustments were made to the list of participating countries with minimal effect on implementation.

104. The project leveraged the expertise of several specialist organisations – UN agencies, academic institutions; fisheries governance institutions, etc. – to deliver a well-rounded package of training contents that cover technical areas as well as policy alternatives, thus benefiting policy decision makers and industry practitioners as well. The project also raised additional resources representing over 25% of the initial budgets.

Sustainability. The project contributed to institutionalizing the knowledge transfer mechanisms through the Regional Centres of Excellence in Vietnam and Mauritius, which enable replication and upscaling of the training programme to benefit several more participants from interested countries. The project also contributed to concrete changes in domestic legislation, institutions

and policies in four of the five participating countries - Comoros, Mozambique, Myanmar and Uganda – which can be considered irreversible improvements.

105. Whether the project has translated into or catalysed additional projects too remained indeterminate; whether the project countries have begun engaging with other donors, development institutions and other investors to mobilize investments in their fisheries sectors was not evident. UNCTAD made some efforts in this direction with an Impact Investment event under the project. UNCTAD also has opportunities to promote investment and technical cooperation support through mechanisms such as the UN Inter Agency Cluster and the Enhanced Integrated Framework that UNCTAD is part of.

Gender and human rights. Contrasting with the rich technical content of the project, coverage of gender and human rights issues in training contents was comparatively weak. Issues were not addressed in a systematic manner, even though gender roles in the fisheries sector were recognised in the analysis. There is a commitment to improve on these aspects in subsequent actions and follow-up activities provided that additional project funds are secured. However, the project strived for equal participation of women and a number of women officials, experts and practitioners received training on the various aspects of the fishery sector.

106. Despite available evidence from Bangladesh and Vietnam, the aquaculture sector's potential to create economic and social empowerment of women did not receive specific coverage in the deliberations from livelihoods promotion or social equity policy perspectives.

Partnerships and synergies. The project built strong institutional arrangements with two Regional Centres of Excellence in Vietnam and Mauritius for replicating and upscaling the capacity development approaches developed. The project also brought in a number of specialist agencies, especially the Food and Agriculture Organization (FAO), the International Maritime Organization (IMO), the Marine Stewardship Council (MSC), the Aquaculture Stewardship Council (ASC) to contribute expertise and deliver training content.

107. However, the potential for involving some agencies (FAO, UNDP and UNIDO for instance) can go far beyond content support- and extend into development of full-scale market access joint programmes and investment mobilization. UNCTAD's institutional arrangements such as the Inter Agency Cluster can facilitate such partnerships for specific opportunities emerging in countries that participated in the 1415M project.

D. Lessons learned/Good practices

108. As a capacity development programme, the 1415M offers some interesting lessons and illustrations of good practices. These are summarized below.

109. **Sequencing knowledge interventions covering anchor participants.** The 1415M approach presents a good illustration of the sequenced and well-spaced delivery of knowledge to the same direct beneficiaries, in comparison to a series of one-off training programmes covering a larger number of beneficiaries. The phased delivery of knowledge and capacity development consisting of a series of engagements spaced over a three-year period was an important factor that

contributed to absorption and application of the knowledge and information acquired. The first phase assisted participating countries in: identifying specific challenges and constraints in their fisheries sectors, which was then used to build training contents for the project; the trainings in the regional workshops enabled participants to test and pilot some lessons in policies and practices their areas of work. The identification of programme delegates is an important aspect in this regard. The participation in multiple workshops by the same participants – who were in anchor positions in the fisheries sectors – was an important design aspect that ensured progressive learning covering a range of interconnected issues affecting the performance of the sectors and learning from the experiences of other participants. The choice of participant profile was pragmatic: the delegates were all officials with policy influence roles or playing a key role in applying standards and regulations in practice.

110. **Focus group discussions to gauge knowledge absorption and application:** The systematic use of focus group discussions on key topics of the training workshops presents a good illustration of practical feedback on delegates' absorption capacities and the manner in which they would apply the knowledge in their domains. The project's end-of-day discussions stimulated good discussions and interactions among delegates and brought out a sense of the key takeaways from presentations, and how they sought to apply the lessons from various sessions in their countries. Group discussions made it easy for observers to identify the champion participants who had potential to become change makers. However, as delegates were nominated by government with little or no role for UNCTAD in selection, an improvement in the practice could be a more consultative process involving UNCTAD in selecting the participants, to ensure a good mix of technical and policy level exposure. In the workshops, senior officials with a mix of technical knowledge, good articulation and leadership skills were seen as more promising, and these traits could be formally included in the criteria for selection.
111. **South-South Cooperation modalities:** An important element of the 1415M design was the reliance on highlighting the experience of developing countries, which are more relevant for LDC contexts than the lessons from middle- or high-income countries. The success trajectories of developing countries and even some LDCs are more readily understandable and replicable, by identifying the key transformative policy actions implemented in these successful countries. The examples of Vietnam and Mauritius, and the hands-on training received in Vietnam and in China are more 'relatable' to LDC contexts than European or US case studies.
112. **Market based approach- Value Chain Analysis:** The 1415M also demonstrated the benefit and effectiveness of a market-based approach using Value Chain Analysis models, which can be applied to different contexts to inform strategic choices for policy and sector development policies. These approaches can help in rightly positioning of the fisheries sector in a relevant market, which could be national, regional or international, and an assessment of state of competitiveness at various points of the value chain and identification of the most beneficial entry points to guide strategies and policies based on the available resources and productive capacities.
113. **Fisheries Improvement Programmes as development compacts:** Fisheries Improvement Programmes offer entry points for development support for countries at any state of

development, even countries without the basic processing infrastructure and market linkages and with limited institutional capacities. and technical support. As an option to sector wide development approaches, FIPs present concrete 'bite-sized' actions that could be considered for development support, while serving as building blocks of long-term strategies for exports.

114. **Designing ex post rather than summative evaluations:** Given that projects such as the 1415M are knowledge intensive, their real impact in terms of translating knowledge into capacities and then policies and actions requires a minimum threshold of time to be observable. The requirements of evaluations to be completed within the project duration limit the usefulness due to the infeasibility of tracking the pathways of change caused by the project. Development projects could consider the merits of allowing ex post evaluations (conducted within one year after end of the project) instead of summative evaluations.

E. Recommendations

115. As DA projects do not have the scope for a second phase, the recommendations made hereunder are aimed at: improving the design of similar projects, and also follow up actions that UNCTAD and participant countries could take (through supplementary projects or other sources of funding) to consolidate the gains made from 1415 M.

A. Actions by UNCTAD and Participating Countries ensuing from 1415 M

116. Gender and Human Rights: With the project's activities now completed, the final versions of the Training Manual should include a chapter on Gender issues, prepared in consultation with an authoritative institution more specialised in analysis of gender issues in fisheries. Related, in the future training curriculum to be designed by the Centres of Excellence, there should be a session on Gender Equality, Human rights and Fisheries, for which expert speakers should be identified from specialised institutions advocating on gender equality and women's empowerment.
117. Submission of IA1 and IA3 reports by governments of participant countries: UNCTAD should consider seeking from participating countries: a report outlining major policy actions being considered for export development and the strategy forward (IA1); and a report outlining further capacity needs of governments and private sector to comply with international sanitary and phytosanitary standards (IA3). These would reflect the extent of absorption and application of the knowledge acquired over the duration of the project through the series of workshops. In case there are residual funds from the project budget, a small preparatory grant could be provided to each participating country for this purpose.
118. Proposals/ Concept Notes for Fisheries Improvement Programmes: Based on the 1415 M, several participating countries have expressed interest in implementing measures to improve the competitiveness and sustainability of their fisheries sectors. Based on specific requests, UNCTAD could consider a multi-country intervention to assist the five participating countries to develop actionable Fisheries Improvement Programme Proposals/ Concept notes for consideration by donors and other agencies for technical cooperation. To take the concept further, UNCTAD could develop a standard Project Formulation Facility mechanism for funding to assist countries in

developing Fisheries Improvement Programmes using a structured process: diagnostic elements, national consultation workshops and prioritization of key elements – stocks management, fishing regulations biosecurity regulations (including laws on invasive and exotic marine species), landing infrastructure, processing, standards and market access, certification, etc. The formulation missions could consist of specialist organisations such as FAO, UNIDO and others, besides UNCTAD.

119. **LDC Market Access Initiatives:** The 1415 M clearly brought out the issue of asymmetry of market information as a major challenge for all fish exporting LDCs, resulting in producers getting disproportionately low share of market prices. UNCTAD could document successful cases experiences of other developing countries in penetrating markets through actions such as: market regulations (minimum export prices), market information bulletins in key entrepot centres, and appointing export marketing agencies in the trade sections of overseas missions, and disseminate these to the project participating countries and LDCs in general. This could also be added into the final compendium of knowledge products of the 1415M.

B. Design of capacity development projects

120. **Delegate nomination and selection:** In all capacity development projects aimed at strengthening government and institutional capacities, the real transformative agents are persons who are not only in the right positions and roles to inform and steer policy change, but also possess the individual traits and motivation to learn from the best practices and apply them into their domains of influence. Thus, the long-term success of capacity development projects is in training the best suited persons with technical and leadership skills in the right positions with the opportunity to transform policies and actions. Projects such as 1415M could **make the delegate selection process more robust through** a competitive selection process led by governments in consultation with UNCTAD. The availability and personal presence of the delegate for the entire project should be a compulsory requirement and precondition.

121. **Online repository of training content, video lectures:** Capacity development projects such as the 1415M generate huge volumes of high-quality content that only few can receive in the first instance. While the participants are expected to share and further disseminate their knowledge, it would be useful to **build online repositories of all the contents**, including videos of the lectures, for future reference. As no commercial use is expected for these contents, no intellectual property violations are entailed; however, prior consent should be secured and due acknowledgement to presenters should be committed.

Annexes

Annex A. Terms of Reference

Annex B. Inception report

Annex C. List of documents reviewed for inception report (March 2, 2019)

Project Documents:

1415M Development Standards UNCTAD Rev Final Clean

PR 2014 9th Tranche 2014 Progress Report Final

PR 2016_1415M Final

PR2017_1415M Final

PR 2018_1415M DA Final.

Fishery exports and the economic development of Least Developed Countries: Bangladesh, Cambodia, the Comoros, Mozambique, Myanmar and Uganda”.

National Policy Documents:

Myanmar: Fisheries Situation Report

Sierra Leone Fisheries Profile

Sierra Leone Fish Value Chain Analysis with special emphasis on Tonkili District

Kingdom of Cambodia: Strategic Planning Framework for Fisheries: 2010-2019

Comoros: Fisheries in the ESA-IO Region Profile and Trends, Country Review: Comoros

Mozambique: The importance of wild fisheries for local food security

Uganda: Report to Parliament on Fisheries Management

Uganda: Analysis of Incentives and Disincentives for Fish in Uganda

Others:

UNCTAD Research Paper: Fish trade and Policy: A Primer on Non-Tariff Measures

UNCTAD-FAO: Trade Related Fisheries Targets: SDG 14 Life below water

World Fish: Why Gender Equality Matters.

Annex D. Links to documents, testimonials of participants and pictures

- To give more visibility for project activities, a dedicated page (portal) consisting of all the project activities was created and can be accessed on the UNCTAD web site: <http://unctad.org/en/Pages/ALDC/Least%20Developed%20Countries/LDC-Fish-Exports.aspx> The web site provides detailed information on the project, beneficiary countries, press releases and publications. In addition to this, each of the national and regional capacity building workshops and events is logged on the UNCTAD web site.
- A synthesis of the research and analysis together with country case studies and policy lessons learned through the project has been published in 2017 (UNCTAD/ALDC/2017/2). It is also available on: http://unctad.org/en/PublicationsLibrary/aldc2017d2_en.pdf
- The Training Manual on Building the Capacities of LDCs to Upgrade and Diversify Fish Exports is available on-line: https://unctad.org/en/PublicationsLibrary/aldc2018d2_en.pdf
- The following links provide information on individual workshops:
 - Regional workshop held in Mozambique in October 2017: <http://unctad.org/en/pages/MeetingDetails.aspx?meetingid=1608>
 - Regional workshop held in Myanmar in August 2017: <http://unctad.org/en/pages/MeetingDetails.aspx?meetingid=1550>
 - Inter-regional workshop held in Mauritius in April 2017: <http://unctad.org/en/pages/MeetingDetails.aspx?meetingid=1378>
 - National workshop in Uganda, December 2016: http://unctad.org/meetings/en/SessionalDocuments/aldc2016_vws_uganda_prog.pdf
 - National workshop in Myanmar in August 2016: <http://unctad.org/en/pages/MeetingDetails.aspx?meetingid=1176>
 - National workshop held in Cambodia, March 2016: <http://unctad.org/en/pages/MeetingDetails.aspx?meetingid=1067>
 - National Workshop in Mozambique, November 2015: http://unctad.org/meetings/en/SessionalDocuments/aldc2015_Prog_Mozambique_en.pdf
 - National Workshop in Comoros, July 2015: http://unctad.org/en/pages/newsdetails.aspx?OriginalVersionID=1040&Sitemap_x0020_Taxonomy=Africa,%20LDCs,%20LLDCs%20and%20Special%20Programmes;
- Pictures and testimonials from participants about the national workshops are available on social media below:
 - Testimonial of a Mauritian participant: <https://twitter.com/twitter/statuses/920890990596165632>

- Testimonial of a Ugandan participant: <https://twitter.com/twitter/statuses/920728938028126209>
 - Group picture, Regional Workshop in Mozambique: <https://twitter.com/UNCTAD/status/920233053976440832>
 - Group picture, Inter-regional workshop in Mauritius: <https://twitter.com/DelelegnMussie/status/849178811971371008>
 - Group picture, Regional workshop in Myanmar: <https://twitter.com/delelegnmussie/status/763632264542498817>
- Newsletters about the Asian Regional Centre of Excellence and the first Regional Training Course:
 - <http://www.ntu.edu.vn/en/NewsAndEvents.aspx?idtb=6321>
 - <https://unctad.org/en/Pages/MeetingDetails.aspx?meetingid=1962>
 - <http://norhed.ntu.edu.vn/news/1098>
 - Links to TV-coverage of the First Regional Training Course at the Asian Regional Centre for Excellence:
 - <https://vtv.vn/vtv8/unctad-chon-viet-nam-de-chia-se-kinh-nghiem-trong-chinh-sach-phan-trien-thuy-san-20181031113938012.htm>
 - <https://vtv.vn/video/thoi-su-12h-vtv1-31-10-2018-332100.htm>
 - Testimonials from participants at the first Regional Training Course at the Asian Regional Centre for Excellence are available below:
 - Sarah Bawaye, Senior Fishery Inspector (Uganda) <https://youtu.be/aWb5acjsjXI>
 - Manding Saidykhan (The Gambia) <https://youtu.be/o2yDO8yapKw>
 - Paul Omani (Republic of Uganda) <https://youtu.be/q6NLU6fiafU>
 - Sitokozile Sibanda (Zimbabwe) https://youtu.be/yYUmo8rbw_w
 - Florette Rasoarilalao (Madagascar) <https://youtu.be/NExb4gvBU0>
 - National print and online media, radio, television programs covered the technical and policy level workshops as well as interviews by project staff in project countries. Most of the coverages are available online. The relevant links to the coverage is given as hereunder:

Coverage of the national workshop in Uganda in December 2016:

- <http://allafrica.com/stories/201612160038.html>
- <http://www.monitor.co.ug/Business/Aquaculture-exports-to-raise-fisheries-revenue---experts/688322-3488154-7xpnxz/index.html>

Coverage of the national workshop in Myanmar in August 2016:

<https://www.facebook.com/mitvchannel/posts/1702961776635874>

- The Environmental, Social and Economic Role of the Fisheries Sector: Development Potential of the Fisheries and Aquaculture Sector (UNCTAD)

- Standards and Quality: Need for Integrated Quality Infrastructure and Institution Building (ISO)
- Managing Fish-stock, Overfishing and Combating Illegal, Unreported and Unregulated (IUU) Fishing Activities (Nha Trang University)
- Harnessing the Potential of Aquaculture for Export Diversification (Nha Trang University)
- International trade, demand and supply trends: The trade and development potential of the fisheries and aquaculture sectors (UNCTAD)
- Market Access, Subsidies and Non-tariff barriers (UNCTAD)
- Seafood Technology and Safety for Export Diversification and Sustainable Development of Developing Countries in Africa and Asia (Nha Trang University)
- Environmental Certification challenges, opportunities and prospects for weaker players (MSC)
- The social dimension of the fisheries sector (KIT)

Annex E. Additional information on project rationale

Relevance to development needs and challenges of least developed countries. Fisheries are an important sector in several LDCs, making an important contribution to food security, livelihoods and with the potential for exports-led development, resulting in poverty reduction, nutrition, employment creation, building industrial capacities, and empowerment of women. Despite the importance of fish products in their export composition²⁵, many LDCs are unable to sustainably tap the full potential of their fishery resources for socio-economic transformation, substantial income generation and export diversification. Even though six of the top 16 producers of fish from inland waters are LDCs, not a single LDC features in the list of the top 10 exporters of fisheries. The share of LDCs in world fishery exports rose only marginally from 1.6 to 3.5 per cent over three decades 1980- 2013, despite the preferential market access in major fish importing countries, particularly in the European Union. During this period, non-LDC exporters have consolidated their market share and leadership, accounting for over 50% of the global trade in fishery products²⁶.

Constraints preventing the LDCs from developing their fisheries sector and harnessing export potential include: artisanal structure of primary sector; poor physical infrastructure - cold chain transportation, and quality assurance infrastructure; inadequate access to capital for modernization and building a commercial sector; informality and illegal trade; iniquitous fish licensing agreements, and the lack of crucial regulatory capacities and institutions. Developed countries – especially the EU and US, the largest markets –have established increasingly stringent and complex public and private food safety and quality standards for fishery imports. These extend beyond product features alone and cover also environmental standards, particularly eco-labelling and eco-packaging standards. EU import regulations

²⁵ Source: UNCTAD. Fisheries Exports and Economic Development of Least Developed Countries. Page 3. https://unctad.org/en/PublicationsLibrary/aldc2017d2_en.pdf

²⁶ Source: UNCTAD, Fisheries Exports and Economic Development of Least Developed Countries. Foreword https://unctad.org/en/PublicationsLibrary/aldc2017d2_en.pdf

stipulate a certified national competent authority in the exporting country to enforce EU compliant standards and practices for all EU destined exports, extending to all stages of the value chain. The cost of meeting and certifying compliance with these private standards represents an important and costly supply-side constraint, and over serves as a barrier to entry for LDC producers.

Private standards, which are more stringent than mandatory national standards and cover aspects other than food safety and quality – such as sustainability and eco labelling – cover over 70 percent of retail trade in fishery products. Private supply chains tend to promote larger suppliers to ensure closer control and standardisation in supplies and thus exclude artisanal and smaller producers. LDCs often fail to meet the stringent private standards of super markets and independent large retailers.

Governance aspects, especially policies in relation to illegal, unregulated and unreported (IUU) fishing are also becoming important determinants of market access for LDCs, through the Port State Measures Agreement and related covenants. Addressing IUU regulations is thus another increasingly important challenge for these countries, as large industrial buyers and retailers are including sustainability certification requirements in their procurement policies.

A further analysis of the sectors in the five participant countries is presented below.

122. **Cambodia:** Cambodia has among the largest and most diverse inland fresh water fisheries sector in the world, with the Tonle Sap contributing over half the output. The fishery sector (primary) accounts for 10 percent of GDP and 40 percent of employment (including seasonal) and is the mainstay of animal protein requirements for the population. Most of the output is used in domestic consumption; export estimates range from \$60 million to \$100 million, including a significant level of un-recorded trade²⁷. Cambodia exports are mostly to China, besides Vietnam and Thailand. However, ineffective regulation and over-exploitation have resulted in depletion of fish stocks and loss of habitats, besides reduction in exports. Exports face aggressive competition from Vietnam and Thailand which have more developed industrial fishing sectors and longer coastlines. Also, due to IUU practices and non-compliance with HACCP systems, Cambodia does not qualify for access to the EU. A rising domestic consumption and export tax on seafood has made the sector unattractive for industrial operators. The Government has adopted a **Strategic Planning Framework 2010-2019**, to guide the growth of the sector with a focus on supporting small fishers and promote both food security and export growth. Cambodia still is not in the official list of countries that have permits to export fisheries to the EU market.

123. **Comoros:** Fishing is the second largest contributor to Comoros's GDP, representing 8% of GDP and 10 percent of employment (8000 fishers) in 2013, and is a priority sector under the poverty reduction and growth strategy (2010-2014). The sector has a dichotomy,

²⁷ National estimates Fisheries Administration, Cambodia

with a dispersed artisanal domestic segment, and an industrialized offshore segment consisting of foreign vessels. Due to absence of appropriate landing and processing facilities, there is practically no export of fish, and the foreign exchange from the sector is only from licensing fees of foreign vessels. Three-yearly agreements with the EU bring the main revenue for the sector, estimated to be around 800,000 euro for a catch of over 3500 tons, which translates into less than 15 percent of the wholesale price of tuna, the main species harvested. Thus, there is a huge loss of opportunity from the absence of suitable landing and the sale of fish rather than fishing licenses. Modernization of artisanal to larger, motorized boats and investment in inland processing (tuna processing, quality control lab and fishing schools) are important areas being prioritized by the government. Comoros also lacks a comprehensive official framework for its Exclusive Economic Zone, with overlaps with other neighbouring countries. In all this, Comoros also needs adequate investments to make better use of its potential in a sustainable manner and build on its present arrangements with EU. As with Cambodia, also Comoros is not in the official list of countries that have permits to export fisheries to the EU market.

124. **Mozambique:** Fisheries contribute 3-4 percent of GDP and provide incomes to around 20 percent of the population, besides providing half the animal protein needs of the population. Marine fishing accounts for over 90 percent of output (200,500 tonnes per annum catch size) and over 40 percent of value. However, industrial fishing for high value products especially shrimp, while accounting for 7 percent of volume, accounts for over 50 percent of value, and is controlled by international operators. The EU is the prime market for Mozambique fisheries which exported around US\$ 60 million in 2014, although China is emerging as a key and fast-growing destination as well. There has been a sharp decline in exports from 2002, and a steeper decline since 2008, due to the fuel price hike and global crisis, and a shortage of investment capital in the sector. The Poverty Reduction Action Plan 2011-2014 focuses on the improvement of the small-scale fisheries and aquaculture segments, which account for a large share of volume and employment, besides food security for the poorer sections. Mozambique is one of the permitted countries for fish exports (not aquaculture) to EU and has implemented residue monitoring and catch certification schemes to meet EU requirements. However, Mozambique still faces challenges in meeting the EU's public standards and private standards of organised retail buyers and consignments fail the standards tested by the competent authorised entity. With the depletion of marine stocks, commercial shrimp aquaculture is being prioritized under an Aquaculture Development Strategy 2008-2017. Through this project, UNCTAD estimates that Mozambique has a potential to produce close to 4 million tons of aquaculture fish (2million from marine culture and the same quantity from freshwaters. The current capacity is less than 70 thousand tones, destined mainly for local consumption.
125. **Myanmar:** With a rich natural resource base for marine, fresh water and brackish water fisheries, Myanmar's fisheries sector contributes significantly to the economy. With 5 million tonnes (80 percent of which is capture fisheries), with almost equal distribution

between marine and fresh water sources, Myanmar's fishery sector has seen a steady double-digit growth during the past two decades, and supports over 0.44 million full time fishers, and over 2.6 million total employment in the sector. Myanmar has seen a sharp increase in exports, touching \$ 500 million in 2014, led by demand from China and Thailand. Myanmar also benefits from the EBA initiative of the EU; however, market access was withdrawn in 1997 and restored in 2013, subject to food safety compliances. Myanmar, as a member of ASEAN is harmonizing its food safety and quality standards with the regional standards. Thus, investment in upgrading product quality and food safety standards is key to the development of the export sector.

126. **Uganda:** With about 18 percent of national surface area covered by water, Uganda has a sizeable inland fishery sector, with the Lake Victoria alone bringing in half the annual catch volumes. Annual fish production was steady in the range of 200,000 to 250,000 tonnes from the 1990s through 2000s, after which the levels fell due to overfishing and water pollution. With a series of government actions to regulate overfishing, production has now stabilized around 500,000 tonnes (2013). Fisheries (mostly Nile perch) is the second largest export earners, with the EU being the largest market, besides other destinations in Asia, Middle East and Africa. Uganda banned the export of unprocessed fish to develop an export-oriented processing sector. However, its policy on open-access without regulating the number of fishing boats has affected the overall competitiveness of the sector. Although Uganda benefits from market access to the EU, exports to the EU were hit by three bans during 1996-2001 on account of food safety risks. There has been a progressive improvement in the national quality control and HACCP systems, and now Uganda is requalified for export of marine products to EU, although not for aquaculture products. Being a land-locked country, transportation logistics are also an element of cost for export of fish products especially by air.

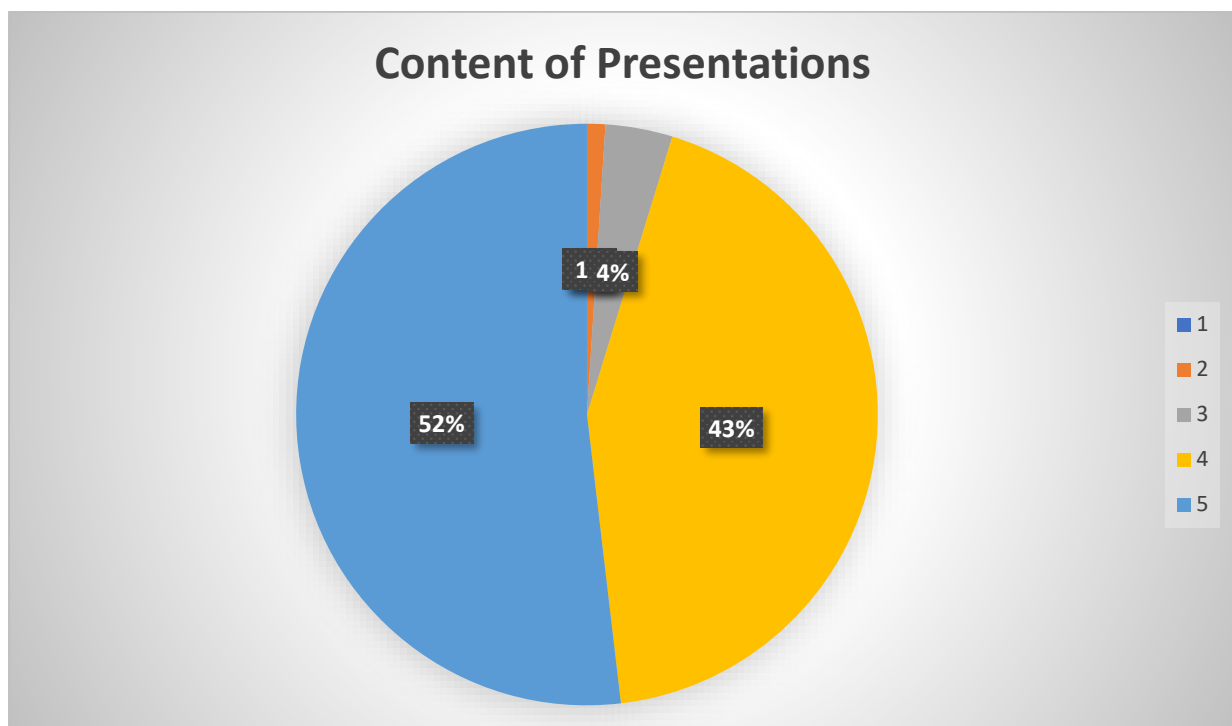
Annex F. List of Respondents.

- Bangladesh Department of Fisheries
- Burundi Ministry of Environmental, Agriculture and Livestock
- Cambodia Department of Fisheries Post-Harvest Technologies and Quality Control
- Cambodia National Institute for Fish Inspection
- Comoros Directorate General for Fisheries Resources
- Comoros Office de Contrôle Qualité et de Certificatin des
- Ethiopia Ministry of Agriculture and Livestock Resources
- Haiti Ministry of Agriculture Natural Resources and Rural Development
- Kenya International Maritime Organization
- Madagascar Ministry of Agriculture
- Mauritius Department of AFS, University of Mauritius
- Mauritius Export Association (MEXA)
- Mauritius Ministry of Foreign Affairs, Regional Integration and International Trade
- Mauritius Ministry of Ocean Economy, Marine Resources, Fisheries and Shipping
- Mauritius Ports Authority
- Mauritius Research Council
- Mauritius Standards Bureau
- Mozambique National Fish Inspection Institute
- Myanmar Department of Fisheries
- South Africa Marine Stewardship council
- South Africa Ministry of Animal Resources & Fisheries
- The Gambia Ministry of Fisheries and Water Resources
- Uganda Ministry of Agriculture Industry and Fisheries
- UNCTAD Division for Africa Least Developed Countries and Special Programmes
- United States of America Agricultural Economics and Rural Auburn University
- Vietnam National Research Centre for Riverine and Lake Fisheries

Annex G. Workshop Participant Survey results

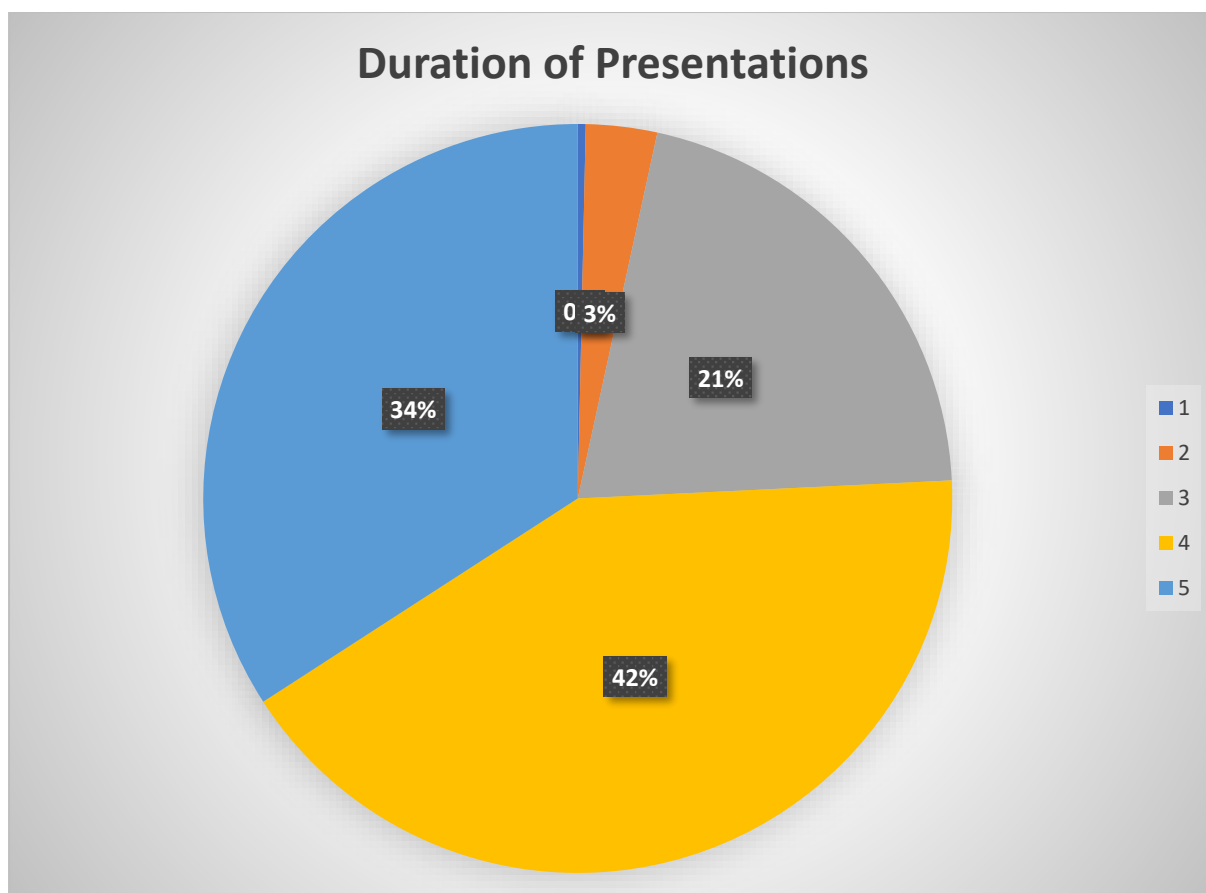
Q1. Content of Presentations

| Scor es | Cambo dia | Mauritius 2017 | Mauritius 2019 | Mozambi que | Ugan da | Vietn am | Myanmar 2017 | Myanmar 2016 | Total |
|---------|-----------|----------------|----------------|-------------|---------|----------|--------------|--------------|-------|
| 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2 | 1 | 0 | 0 | 0 | 0 | 0 | 2 | 0 | 3 |
| 3 | 1 | 2 | 0 | 1 | 0 | 0 | 2 | 5 | 11 |
| 4 | 11 | 14 | 6 | 23 | 23 | 17 | 16 | 18 | 128 |
| 5 | 15 | 13 | 18 | 18 | 27 | 37 | 12 | 13 | 153 |
| | 28 | 29 | 24 | 42 | 50 | 54 | 32 | 36 | 295 |



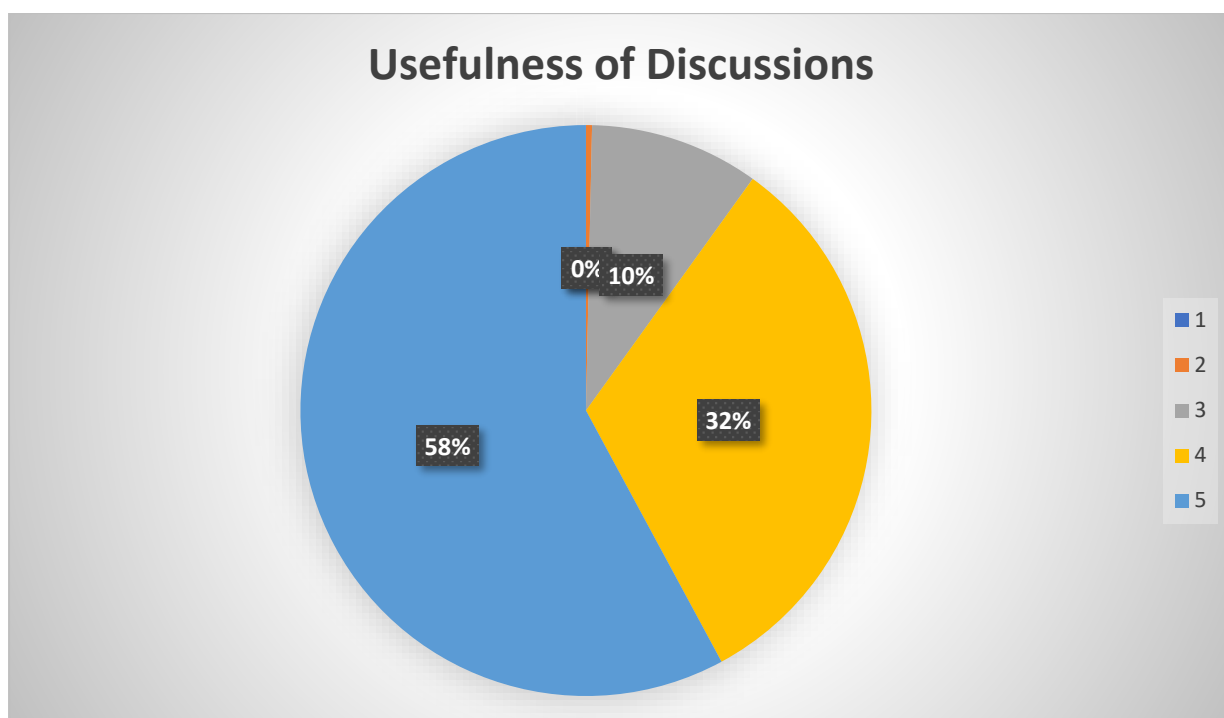
Q2. Duration of Presentations

| Scores | Cambodia | Mauritius 2017 | Mauritius 2019 | Mozambique | Uganda | Vietnam | Myanmar 2017 | Myanmar 2016 | Total |
|--------|----------|----------------|----------------|------------|--------|---------|--------------|--------------|-------|
| 1 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 1 |
| 2 | 0 | 1 | 1 | 1 | 0 | 0 | 4 | 2 | 9 |
| 3 | 4 | 8 | 1 | 21 | 9 | 2 | 9 | 7 | 61 |
| 4 | 11 | 14 | 12 | 17 | 20 | 21 | 13 | 14 | 122 |
| 5 | 13 | 6 | 11 | 1 | 19 | 31 | 6 | 13 | 100 |
| | 28 | 29 | 25 | 41 | 48 | 54 | 32 | 36 | 293 |



Q 3. Usefulness of Discussions

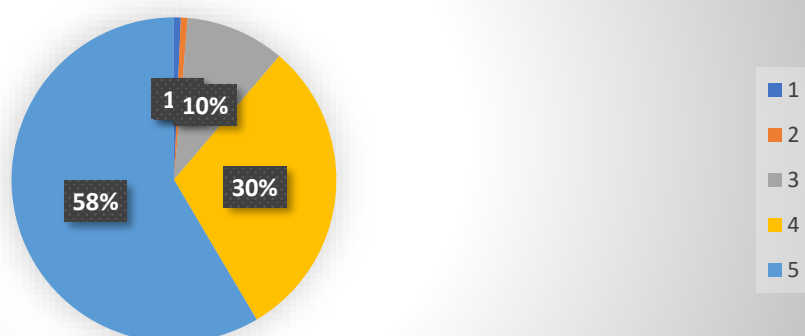
| Scor es | Cambo dia | Mauritius 2017 | Mauritius 2019 | Mozambi que | Ugan da | Vietn am | Myanmar 2017 | Myanmar 2016 | Total |
|---------|-----------|----------------|----------------|-------------|---------|----------|--------------|--------------|-------|
| 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 |
| 3 | 6 | 1 | 1 | 1 | 3 | 4 | 4 | 8 | 28 |
| 4 | 10 | 14 | 7 | 20 | 12 | 8 | 14 | 9 | 94 |
| 5 | 12 | 13 | 17 | 20 | 33 | 42 | 14 | 18 | 169 |
| | 28 | 28 | 25 | 41 | 48 | 54 | 32 | 36 | 292 |



Q 4. Relevance of this workshop for your work

| Scores | Cambodia | Mauritius 2017 | Mauritius 2019 | Mozambique | Uganda | Vietnam | Myanmar 2017 | Myanmar 2016 | Total |
|--------|----------|----------------|----------------|------------|--------|---------|--------------|--------------|-------|
| 1 | 0 | 0 | 0 | 0 | 2 | 0 | 0 | 0 | 2 |
| 2 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2 |
| 3 | 7 | 2 | 1 | 2 | 5 | 2 | 4 | 6 | 29 |
| 4 | 11 | 5 | 3 | 13 | 12 | 17 | 14 | 14 | 89 |
| 5 | 8 | 22 | 21 | 27 | 30 | 35 | 14 | 15 | 172 |
| | 28 | 29 | 25 | 42 | 49 | 54 | 32 | 35 | 294 |

Relevance of this workshop for your work



Q 5. Usefulness of working group activities

| Scores | Cambodia | Mauritius 2017 | Mauritius 2019 | Mozambique | Uganda | Vietnam | Myanmar 2017 | Myanmar 2016 | Total |
|--------|----------|----------------|----------------|------------|--------|---------|--------------|--------------|-------|
| 1 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 1 |
| 2 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 2 |
| 3 | 8 | 2 | 2 | 0 | 5 | 3 | 6 | 9 | 35 |
| 4 | 9 | 9 | 7 | 3 | 13 | 13 | 15 | 11 | 80 |
| 5 | 11 | 18 | 16 | 1 | 30 | 38 | 9 | 14 | 137 |
| | 28 | 29 | 25 | 4 | 49 | 54 | 31 | 35 | 255 |

Usefulness of working group activities

