Fisheries Policy for Grenada
Working document n°1

Support to formulate a fisheries and aquaculture policy for the Commonwealth of Dominica, Grenada, and St. Vincent and the Grenadines

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Acronyms

CBM  Community Based Management (in association with co-management)
CFO  Chief Fisheries Officer
CITES  Convention on International Trade in Endangered Species
CLME  Large Marine Ecosystem Project
CNFO  Caribbean Network of Fisherfolk Organisations
CPUE  Catch per Unit Effort
ESDU  Environment & Sustainable Development Unit of the OECS
FD  Fisheries Division of the Grenada Ministry of Agriculture
GEF  Global Environment Facility of the World Bank
GoG  Government of Grenada
ICCAT  International Commission for the Conservation of Atlantic Tunas
IUU  Illegal, Unregulated & Unreported fishing (ie poaching)
MCS  Monitoring, Control & Surveillance-enforcement arm of fisheries management
MPA  Marine Protected Area inc. Marine parks & marine reserves
MSY  Maximum Sustainable Yield (of a fish stock)
OECS  Organisation of Eastern Caribbean States
PCC  Per Capita Consumption – consumption of whole per person per year
PPP  Purchasing Power Parity – adjusting for real local costs
SPAW  Special Protected Areas & Wildlife, Protocol of the Cartagena Convention
UWI  University of the West Indies
WECAFC  Western Central Atlantic Fishery Commission
Executive Summary

Part 1: The Context for the Policy

The approach adopted for developing this policy has been essentially participatory, involving both the institutional level (government agencies and organisations representing key players in the sector) and the individual key players themselves who were consulted at a series of group meetings. The resultant policy has been guided by these consultations in particular.

This policy document first describes the context for the policy, covering the fish resource, the fisheries, the legislative basis, the Fisheries Division as an institution and Grenada’s relevant international obligations. Subsequent analytical sections assess the Grenadian national policy framework, including key national priorities and the aims & aspirations of Fisheries Division. A section covering regional and international priorities looks at the broader implications of the international arrangements that apply to Grenada, and especially key regional linkages. Finally the results of stakeholder consultations, including those with the fishing communities are described, and the analysis concludes with an assessment of key recent critical contextual changes.

Part 2: The Policy

This all sets the scene for formulating the policy. Firstly the underlying logic for the policy is described through the identification of a number of key policy issues, followed by an explanation of the thinking behind the subsequent policy statements. These are set within a framework of five key themes, chosen to represent the main concerns expressed by stakeholders and also to provide coherence to the wide range of policy issues covered. The themes are as follows:

- Theme 1: Enhancing the status and capability of fishers
- Theme 2: Sustainable stewardship & conservation of aquatic resources
- Theme 3: Realising the development potential inherent within the fisheries sector.
- Theme 4: Maintaining the sector’s role in sustaining livelihoods of the poor.
- Theme 5: Generating a positive interaction with Grenada’s wider economic community.

Key Policy statements

The policy is expressed as a series of relevant statements that express the range of topics encountered in a comprehensible manner, and again reflects the five key themes mentioned above. For each policy topic, objectives are described and indicative priority ranking and scheduling given. The policy is formulated in line with a realistic view of the capacity of Fisheries Division and the institutions that it depends upon.

Theme 1: Enhancing the status and capability of fishers

1 Licensing and registration: Fishing boats should be licensed and fishermen registered as a basic management requirement.

2 Fishermen’s associations: Fishermen will be encouraged to form appropriate associations which are seen as central to the sectors development and management in the longer term

3 Improving fishermen’s commercial knowhow: developing commercial acumen within the fishing industry is seen as being important for both livelihoods and the industry itself.
4 Encouraging fishermen to take responsibility for managing the resource they depend upon through co-management and community based management is rightly a crucial long term goal of the authorities.

5 Fishermen taking more responsibility for their own socio-economic situation. Including pension provision and critical equipment insurance.

6 Safety at sea remains a high priority, but one where fishermen should take a more responsible role rather than relying upon enforcement by the authorities.

Theme 2: Sustainable stewardship & conservation of aquatic resources

7 Sustainable use of the large pelagic resource, shared migratory stocks where Grenada’s off-take is tiny in comparison with the total catch. Management of the stocks is largely out of Grenadian hands, but Grenada should still be involved where practicable.

8 Sustainable use of the demersal species and small pelagics which are largely locally recruited and so managing these stocks is clearly a domestic matter, requiring increased commitment by the Grenadian authorities.

9 Maintaining effective data collection, analysis and reporting systems. Closely tied in with the point above, the Fisheries Division needs to establish a capable data collection and analysis system.

10 A rational response to Grenada’s international obligations honouring those already signed up to whilst judging new agreements in terms of their net practical benefit to Grenada.

11 MCS and reducing IUU fishing in Grenadian waters: Continuing to oppose IUU fishing within the Grenadian EEZ to the extent that national capacity allows and involving the fishing community for surveillance where possible.

12 Marine Protected Areas (MPAs). Following the successful start of the MPA program with expansion in line with Caribbean Challenge goals (20% of coastal waters by 2020).

13 The ecosystem approach to fisheries management will be adopted where pragmatically possible, especially regarding land-water interface issues that are now seen to be crucial.

Theme 3: Realising the development potential inherent within the fisheries sector.

14 Maximising the economic benefit from the aquatic bio-resource for all Grenadian people remains an overriding guiding principle, subject to the wise stewardship of the resource base.

15 The seafood processing and export industry. Grenada’s seafood post harvest industry will continue to be supported through maintaining effective hygiene and food safety regime, in cooperation with the Ministry of Health as Competent Authority.

16 Aquaculture. Although aquaculture has yet to contribute to production, it is important to prepare for a time when it may do so. Appropriate measures to support farmers and protect the environment are set out.

17 Subsidies and Concessions. Subsidies to the fishing industry are justified politically but not necessarily economically, and should be reviewed periodically accordingly. They should though be administered efficiently and in a timely manner.

Theme 4: Maintaining the sector’s role in sustaining livelihoods of the poor.

18 Fisheries livelihoods for the poor. The need to retain fishing as a traditional fall back for those with little alternative economic recourse is accepted as an essential guiding principle.
19 **Segments of the fishery available to the poor.** The stocks most accessible to the poor, the small pelagics (jacks) and close inshore demersals should be preserved for their exploitation should the need for such measures arise.

20 **Interaction between fisheries and the wider economy** The potential for conflict between the poorer segments of the fishing industry and alternative users of the coastal zone is recognised as is the need for mitigation measures.

**Theme 5: Generating a positive interaction with Grenada’s wider economic community.**

21 **The tourism and leisure industries interaction with fisheries;** The need for fisheries policy to address the wider economy is evident given a common dependence upon the marine resource, the potentially conflicting demands and the importance of tourism.

22 **Preserving high profile species.** In this connection the future need to further conserve “flagship” species such as turtles with high tourism and amenity appeal is recognised.

23 **The tourism-driven market for fish** as a key area where imports can be reduced and Grenadian fisheries benefitted should be supported through the widespread adoption of the necessary quality and hygiene measures.
Part 1: The Context For The Policy

1. Approach to formulating the Policy

The approach adopted for developing this policy has been essentially participatory, with attention given to both the institutional level (government agencies and organisations representing key players in the sector) and the individual key players themselves who were consulted at a series of group meetings. To this end:

- Nine key stakeholder focus group meetings were held involving the broad spectrum of potentially interested parties from fishermen’s associations and processors to aquatic tourism operators. In each case comments were noted and the sessions concluded with the consensual resolution of the multiplicity of points raised as a limited number key issues. A series of priority issues emerged after analysis and these formed the basis for subsequent consultations.

- Four Community Consultations were held in the more important fisheries centres in Grenada (Grenville, Gouyave and St Georges) and Carriacou. A number of fishermen and other frontline stakeholders (traders, mechanics, aquaculturalists) were involved. The policy development process was explained, the initial priorities already identified presented and through a knowledgeable facilitator, responses elicited.

The feedback from these dialogues has formed the basis for the policy. The other important inputs were one-on-one interviews with key Ministry of Agriculture and Fisheries Division staff and access to essential documentation including relevant legislation, strategic plans, international agreements as well as economic analyses and databases. The process was guided by a Technical Team, made up of members of the Fisheries Division and those from key stakeholder groups outside government. This team met periodically to steer key aspects of the programme, and will continue to do so in the subsequent phase.
2. Findings of the Diagnostic – Situation Analysis

An initial stage in the policy formulation process was the preparation of a “Working Document” which both analysed the current situation within the fisheries sector (the diagnostic, which is a key supporting document for this policy) and reported on the findings of the key stakeholder consultations. This section summarises the findings of that diagnostic with a particular focus on its strategic implications for the sector.

2.1 Summary review of the current situation

2.1.1 General Background

Grenada is an independent Caribbean Island that has all the complex and many faceted responsibilities of a major state but has to service these with a population of just some 108,000 and an economic quantum to match. This is a challenge faced by most of Grenada's neighbouring island states and has led to a degree of regional coherence expressed through institutions such as Caricom and the Organisation of Eastern Caribbean States (OECS). That said, Grenada acts as a fully autonomous entity, and moreover does so with considerable success.

Caribbean islands differ to surprising degree and with its sophisticated tourism industry, its advanced academic institutions, it traditional agricultural specialities and its emerging popularity as a retirement/holiday home location, Grenada clearly maintains its distinct individuality. In the light of this, the section below sets the broader context for characterising the fisheries sector by defining key Grenadian physical, social and economic parameters (table 1).

<table>
<thead>
<tr>
<th>Table 1: Summary of Key Contextual Parameters for Grenada</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Physical parameters</strong></td>
</tr>
<tr>
<td>Land area</td>
</tr>
<tr>
<td>344 km²</td>
</tr>
<tr>
<td>Length of Coastline</td>
</tr>
<tr>
<td>At least 121 km</td>
</tr>
<tr>
<td>Territorial Sea</td>
</tr>
<tr>
<td>4,504 km² (12 nautical miles)</td>
</tr>
<tr>
<td>Claimed EEZ</td>
</tr>
<tr>
<td>20,285 km² (200 nautical miles)</td>
</tr>
<tr>
<td><strong>Social parameters</strong></td>
</tr>
<tr>
<td>Population</td>
</tr>
<tr>
<td>107,820 (July 2010 est)</td>
</tr>
<tr>
<td>Work force</td>
</tr>
<tr>
<td>47,580 (54% male; 46% female)</td>
</tr>
<tr>
<td>Workforce deployment</td>
</tr>
<tr>
<td>Agriculture 11%, Industry 20%, services 69%</td>
</tr>
<tr>
<td>Unemployment</td>
</tr>
<tr>
<td>25% (2010)</td>
</tr>
<tr>
<td>Fish consumption (PCC)</td>
</tr>
<tr>
<td>32 kg/person/year (whole fish equivalent, 2000)</td>
</tr>
</tbody>
</table>
2.1.2 The Fisheries Sector

The previous section has set the context within which Grenada’s fisheries have developed in the past and are now emerging as a key commercial and socioeconomic contributors to Grenadian society. This section looks at the fisheries sector in detail, starting with a broad characterisation. Grenada may command a large extent of sea in relation to the island’s size, but the majority of this is deep oceanic water with a relatively small area of shallow shelf, this mostly to the north along the Grenadian segment of the Grenadine archipelago. This has determined the nature of the fishery – it is dominated by large oceanic pelagic species like tuna, which now constitute 75% of landings. The other principal constituents of the fishery are demersals (reef fish like snapper, grouper and parrotfish) small pelagics (mostly scads) caught close inshore. Shellfish (lobster and conch) are caught in small quantity, but being disproportionately valuable, make a significant economic contribution.

The fisheries sector has assumed a greater importance in recent years. After hurricane Ivan (2004) it was one of the first primary productive sectors to spring back into life, and so played a significant role in reviving the economy. Key aspects of the sector’s contribution to the national economy have included:

- The employment and economic activity it supports, especially in the more remote and otherwise disadvantaged island communities
- The expanding export of high-value fish (fresh tuna) that has emerged in recent years. This has generated a significant level of foreign exchange and indeed has been one of the major sources of this in recent years.
- Fishing plays an important part in national food security and poverty alleviation – especially the small inshore pelagics (jacks) that can be caught with inexpensive gear and are sold at low prices.

Sources given in the Policy Working Document

The fisheries sector does not exist in isolation. This is particularly true in Grenada where the tourist industry is both a major economic segment and highly aquatic/marine-orientated. This is augmented by the extensive second homes/holiday homes industry that has burgeoned of late with further implications for aquatic leisure activities. The tourism sector is informally estimated to be worth EC$ 250 million to Grenada annually (12% of GDP) after all accommodation, foodservice and other inputs are accounted for. The diving segment alone is believed to contribute about EC$ 57m, or 23% of this when all the ancillary services that divers demand are included. Clearly, the marine environmental resources of Grenada have important implications that go beyond direct exploitation for food, and the establishment of a number of MPAs (Marine Protected Areas) has been an important response to this imperative.

There is another key interaction between the tourism/leisure sector and fisheries, and that is the demand tourism creates for high quality food fish. Tourists visiting the Caribbean expect to eat fish and the abundance of prime species in the Grenadian catch is an advantage here – with dolphin (mahi mahi), tuna, wahoo/kingfish, snapper, grouper, lobster and conch all in this category. Tourism then plays a role in both expanding the market for Grenada’s prime catch and maintaining higher prices for fishermen.

<table>
<thead>
<tr>
<th>Economic Parameters</th>
<th>GDP (2011)</th>
<th>US$ 800 (US$1,428 PPP)</th>
</tr>
</thead>
<tbody>
<tr>
<td>GDP per Capita (PPP)</td>
<td>$13,300 (2011 est.)</td>
<td></td>
</tr>
<tr>
<td>National Budget</td>
<td>Revenue $US 175.3m, expenditure $US215.9m (2009)</td>
<td></td>
</tr>
<tr>
<td>Fisheries contribution to GDP</td>
<td>1.92% (2011)</td>
<td></td>
</tr>
</tbody>
</table>
It also has a **significant role in the fast growing tourism industry**, much of which has a strong aquatic orientation, with diving and sports fishing the most directly related aspects.

**The resource**

Like most of its Caribbean neighbours, Grenada has a complex multi species fishery, with a mix of large and small pelagics, a wide spread of demersal species (reef fish and deepwater snapper) and some high value vulnerable fisheries (lobster, conch and turtle). Figure 1 shows the species composition of Grenadian landings (taken from 2009 data), colour coded to highlight the principle species categories: darker shades of blue for large pelagics, pale blues for small pelagics and browns for demersals. The importance of two pelagic species at opposite ends of the size spectrum – yellowfin tuna and big eye scad (jacks) is evident.

**Figure 1**

![Species Composition of the Grenadian Catch](image)

Source: FAO FishStat 2009.

Table 2 below shows how almost 75% of the Grenadian fish production is pelagic species, large and small, with large pelagics contributing 50% to the total catch. The higher value segment of the demersal catch – grouper (including hinds), snappers and lobster - accounts for just 14% of the total. Even so, the prime component of the catch is relatively high at a little over 50%, when the tunas and dolphin fish are included. Grenada is then well positioned to supply its growing tourist industry as well as exporting to lucrative markets.
This project is financed by the European Union  
Project implemented by

"Strengthening fisheries management in ACP states"

Table 2: The Composition of the Grenadian Seafood Catch in 2011

<table>
<thead>
<tr>
<th>Major category</th>
<th>Tonnes</th>
<th>Proportion of catch</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yellowfin tuna</td>
<td>630</td>
<td>24%</td>
</tr>
<tr>
<td>Blackfin tuna</td>
<td>187</td>
<td>7%</td>
</tr>
<tr>
<td>Billfish (eg marlin etc)</td>
<td>289</td>
<td>11%</td>
</tr>
<tr>
<td>Dolphin fish</td>
<td>195</td>
<td>7%</td>
</tr>
<tr>
<td>Bigeye scad</td>
<td>542</td>
<td>21%</td>
</tr>
<tr>
<td>Other small pelagics</td>
<td>94</td>
<td>4%</td>
</tr>
<tr>
<td>Grouper &amp; hinds</td>
<td>232</td>
<td>9%</td>
</tr>
<tr>
<td>Snappers</td>
<td>104</td>
<td>4%</td>
</tr>
<tr>
<td>Parrotfish</td>
<td>107</td>
<td>4%</td>
</tr>
<tr>
<td>Lobster</td>
<td>23</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>211</td>
<td>8%</td>
</tr>
<tr>
<td>Total</td>
<td>2,614</td>
<td>100%</td>
</tr>
</tbody>
</table>

Source: Fisheries Division.

The long term history of the Grenadian fishery has been one of rising production, with a relatively steady progress from an annual landing of around 300 tonnes in 1950 to 2,500 tonnes now. The political upheavals of the early 1980's clearly took their toll, and fish production more than halved briefly. Thereafter there has been solid progress, if normal year-on-year fluctuations are ignored.

Figure 2

Over the 60 years there have been very significant changes within the fishery, especially the replacement of small pelagics by large pelagics which apparently occurred at the end of the 1970's. This also represented a major change in unit value as catches worth $US2-3/kg were replaced by those worth $US5-10/kg. One key factor in this change must have been the Fisheries Division’s encouragement of the switch away from hard pressed demersal species towards tuna long lining. This moved effort away from a limited and relatively static domestic resource to a far larger but highly...
mobile one where Grenada’s impact is fairly marginal. After a further two decades there has been another change, with the demersal catches beginning to rise substantially, a process that has apparently not reached its zenith. The implications for resource sustainability in this case are a concern though.

**The Grenadian Fishery**

The Grenadian fishing fleet includes a mixture of (i) relatively advanced, well equipped and well maintained larger vessels with inboard diesel engines (long liners), (ii) outboard powered open boats and (iii) small subsistence inshore boats. In short it spans the modern and the traditional, a divide that continues through to the downstream sector, and exemplifies the fisheries sector’s national socio-economic role. In fact the industry has significant relevance to most segments of Grenadian society. There are at arguably nine separate fisheries involved, but five broad segments stand out, as follows:

- **Large offshore pelagics (75% of the catch):** really two fisheries – (i) a surface long line fishery for large pelagics (yellowfin tuna and billfish) along the west coast and (ii) a trolling fishery for dolphin fish, small tunas, wahoo and king mackerel of the east coast.

- **Small coastal pelagics (9% of the catch):** A close inshore beach seine fishery for small pelagics, mostly scads (jacks) along the west, north and northeast coasts – seen as a “fall-back” option for those with few economic alternatives.

- **Demersal fisheries (shallow coral reef, 14% of the catch):** Snapper, grouper (red hind) etc caught by handlines and conventional gill nets. An inshore speargun fishery for shallow water demersals is another option for those unable to invest in a boat.

- **Deep water slope edge fishery (a marginal contributor as yet):** Deepwater snappers including silk, blackfin and *Etelis sp*, caught by handlines or droplines.

- **Shellfish (2% of the catch):** includes small quantities of lobster, conch and crab, but a more significant contributor in value terms.

To varying degrees some other species are also caught: some turtle species, “sea moss” (the marine algae *Gracilaria* sp) and “sea eggs” (sea urchins) although collecting the latter is now banned to allow stocks to rebuild after heavy exploitation in the past.

| Table 3: The Grenadian Fishing Industry: Key Parameters |
|-------------|--------------------------------------------------|
| Fishermen   | 1,500 (approx 75% full time)                     |
| Fishing boats| 800                                              |
| Long liners  | 70 8-15m decked modern vessels, inboard diesel powered |
| Open boats   | 5-10m open boats powered by outboards            |
| Inshore boats| 4-8m open row boats used for seining etc         |
| Landing Sites| 45                                               |
| Main fishing centres | 3 St Georges, Gouyave, Grenville |
| Employment in the Sector | 3,800 including all ancillary players |
| Fish vendors/hawkers | 72 (2010)                                    |
| Fish Processors | 3 (mainly primary processing – fresh tuna)    |
| Fish exporters | 8 larger exporters, including the processors |


From a social perspective, the industry is segmented by gender - as a rule, women are more involved in fish marketing and primary processing, while men are involved in primary production. This is the
traditional pattern where men go to sea whilst women look after the postharvest aspects on land, familiar worldwide. The sector also spans the social spectrum, with the relatively wealthy involved in processing and commercial long lining whilst – at the other extreme - spear fishing and beach seining for jacks can provide economic and food security options for the poorest. The main shore-based expression of the fisheries sector is a number of fisheries centres that variously include harbours or other facilities for fishermen, ice production, fish storage capacity and fish markets. Funded by JICA (Japanese aid) this infrastructure is located in most major fishing communities as detailed in table 4.

<table>
<thead>
<tr>
<th>Location</th>
<th>% of landings</th>
<th>Fisheries facilities in place</th>
</tr>
</thead>
<tbody>
<tr>
<td>St Georges</td>
<td>23%</td>
<td>Fish harbour, Fish Market Complex, ice &amp; cold storage</td>
</tr>
<tr>
<td>Melville St</td>
<td>11%</td>
<td>Fish harbour, Fish Market Complex, ice &amp; cold storage</td>
</tr>
<tr>
<td>Grand Mal</td>
<td>12%</td>
<td>Jetty, ice plant 2 processing plants with cold storage</td>
</tr>
<tr>
<td>Grenville</td>
<td>25%</td>
<td>Fish harbour, Fish Market Complex, ice &amp; cold storage</td>
</tr>
<tr>
<td>Gouyave</td>
<td>22%</td>
<td>Jetty, Fish Market Complex, ice &amp; cold storage, 1 proc plant</td>
</tr>
<tr>
<td>Others</td>
<td>12%</td>
<td>Mostly fish market with ice and cold storage</td>
</tr>
<tr>
<td>Grenadines <em>Others on Grenada: Victoria, Duquesne, Sauteurs etc</em> Carriacou</td>
<td>18%</td>
<td>Jetty, transhipment point for sales to Martinique</td>
</tr>
</tbody>
</table>


Fishermen are mostly not licensed and nor do they currently need to be. The licensing system concentrates on the boat not the fishermen, but even so a significant number of the smaller boats (rowing boats) are apparently not licensed. Fishermen are also mostly not registered either (again there is no compulsion for so being) with the main motivation for becoming licensed being the access to concessional (reduced duty) inputs. Thus, no demand for concessions equates to no registration of fishermen, who generally prefer to reside well “below the governments radar” whenever they can in Grenada (as in most other parts of the world). A 2009 survey identified 1,450 boats but only 800 of these are believed to be genuine fishing vessels (rather than leisure craft). However, only 370 fishermen were registered: that is only 25% of the estimated total of 1,500. The majority of these registered fishermen were from the St George and St John (Gouyave) Parishes

**Aquaculture in Grenada**

Aquaculture has not as yet developed as a significant activity in Grenada. The constraints are (i) **Terrestrial sites** - lack of coastal sites (land being too valuable for housing, tourism and other developments) whilst inland sites close to water suffer from topographical limitations (very little flat land). Standing fresh water bodies are generally deemed to be too valuable to be used for aquaculture (ii) **Marine sites** - although there are protected coastal bays that could harbour cages, most are (a) shallow thus not ideal (b) face competition from competing marina, yachting and coastal development interests. (iii) **Markets** – plentiful supplies of relatively cheap fish (jacks/scads) and higher value species (dolphin fish & tuna) limit demand for farmed species.

There have been attempts to promote aquaculture in the past though – prompted by the introduction of tilapia in 1982 and freshwater prawns (*Macrobrachium*) in 1992. Perhaps the most promising immediate candidate is sea moss (*Gracilaria spp.*) a marine algae for which there is demand and wild supplies have been much depleted. A trial project in the 1980s was reputedly promising, but did not lead to any commercial development at the time. The current status of aquaculture in Grenada remains, at best, experimental - a small trial sea moss project is currently underway at Grenville, and there is a small tilapia farm in the uplands nearby.
**Marine Protected Areas (MPAs)**

Grenada has a number of MPAs and is intending to create more. The objective is to combine the need for conservation of fish species and coastal bio-resources (e.g. mangroves) for the fishing industry with enhancing the aquatic attractions for the nationally important tourist industry. To this end the MPAs have been enshrined in law (in the Fisheries Act and specific MPA regulations of 2001), the park areas delineated and signposted and an extensive, broadly targeted public awareness campaign organised. There are three MPAs in Grenada now – located at (i) Moliniere Point to Beausejour Bay near St Georges, (ii) Woburn/Clarkes’ Court Bay in the South (still being established) and (iii) Sandy Island/Oysterbed in Carriacou.

**Fishermen’s associations**

There has been a policy of strongly supporting mutuality within the fisheries sector – expressed through establishing fishermen’s associations or cooperatives. The perceived advantages are (i) the lobbying power such associations give fishermen who, as relatively poor individuals, are often marginalised (ii) the communication and managerial facility such arrangements allow, providing Fisheries Division with an effective means of both getting feedback from, and disseminating information to, fishermen, (iii) the way such associations provide the starting point for fishermen themselves taking on a more responsible managerial role within a co-management or community based management (CBM) arrangement and (iv) the prospects they provide for bringing fishermen into social security systems (e.g. the Grenadian National Insurance Scheme, NIS) or for devising effective boat insurance arrangements.

There are 10 primary fishermen’s organisations. Eight are located on Grenada, one in Carriacou and one in Petite Martinique. There is also a senior body that could potentially become the basis for a federation of these organisations, so providing fishermen with a powerful single body able to exert significant influence on the body politic. This is the National Fishermen’s Organisation (NFO). However, this organisation is currently moribund and this is indicative of a problem for the aspiration of developing mutuality or community solidarity within the fisheries sector generally. In fact these associations were generally vibrant and active until 1995-7 but many have declined subsequently. As a result many of these associations or cooperatives are now in a poor state of health. Reversing this decline has been a key longstanding priority for Fisheries Division.

**2.1.3 Postharvest Aspects: Processing, Marketing & Export**

**Processing & Export**

Grenada is unusual amongst the Eastern Caribbean in having a successful high value seafood export business. There are two main elements to this: (i) Fresh tuna exports sent by air to the USA and (ii) fresh demersal fish (grouper, snapper etc) exports sent by sea to Martinique. Both have significant and positive economic implication for Grenada.

(i) **Tuna exports to the USA.** There are three principle tuna processor/exporters in Grenada: Spicesisle Fish House, Nordom Seafoods Ltd and the Southern Fisherman’s Association (SFA Inc). They all export fresh yellowfin tuna to the USA and collectively they export about 500 tonnes of whole fish annually. Their main business activity is ensuring that high quality fish is delivered to them (held on ice), repacking it with gelpacks for airfreight to the USA (Miami) and managing the necessary documentation.

(ii) **Demersal fish exports to Martinique:** Five vessels currently act as fish carriers delivering chilled grouper (red hind), snappers and parrot fish to Martinique. These boats do not catch fish (the Carriacou and Petite Martinique fleets do this), but are equipped to keep and deliver the fish in good condition. Moreover, they have, through significant investment, managed to achieve the quality standards required to gain an EU “number” (i.e. permission to supply the EU market with fish but not shellfish). This is a condition imposed on them by the fact that their traditional market, Martinique, is deemed to be part of the EU because Martinique is a Department of France. The total annual export varies between 100 and 150 tonnes.
Table 5: Grenadian Fish exports, 2006-11, Units tonnes and $EC & $US millions

<table>
<thead>
<tr>
<th></th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yellow Fin Tuna</td>
<td>279</td>
<td>373</td>
<td>372</td>
<td>346</td>
<td>509</td>
<td>448</td>
</tr>
<tr>
<td>Red Hind</td>
<td>72</td>
<td>48</td>
<td>47</td>
<td>42</td>
<td>48</td>
<td>35</td>
</tr>
<tr>
<td>Parrot Fish</td>
<td>85</td>
<td>61</td>
<td>58</td>
<td>57</td>
<td>69</td>
<td>55</td>
</tr>
<tr>
<td>Big Eye Scad</td>
<td>0</td>
<td>0</td>
<td>5</td>
<td>3</td>
<td>36</td>
<td>30</td>
</tr>
<tr>
<td>Other</td>
<td>77</td>
<td>47</td>
<td>50</td>
<td>53</td>
<td>20</td>
<td>18</td>
</tr>
<tr>
<td>TOTAL</td>
<td>513</td>
<td>529</td>
<td>533</td>
<td>502</td>
<td>682</td>
<td>586</td>
</tr>
<tr>
<td>Value $US m</td>
<td>$3.71</td>
<td>$4.15</td>
<td>$3.97</td>
<td>$3.94</td>
<td>$5.61</td>
<td>$5.38</td>
</tr>
</tbody>
</table>

Source Fisheries Division

The total Grenadian seafood export is 6-700 tonnes per year. The benefits include foreign exchange generation, and the diversion of part of the catch that could otherwise have been surplus to domestic requirements and so could have led to substantial price declines. Essentially, it has allowed the expansion of the industry, and especially that of the commercial long line fishery that could otherwise have been constrained by the limited domestic market. On the other hand, exports of small pelagics (scads) could be reducing the availability of bait, so constraining this fishery. The value of the Grenadian fishery is put at $EC30-32 million/year at first point of sale by Fisheries Division. Of this, exports account for approximately half at $14-15million/year ($US5.5m). This is because Grenada has been successful in selling into prime markets at relatively high prices: the Grenadian seafood “brand” is clearly well regarded – at least as implied by the prices paid

Hygiene & Food Safety

Central to this export success has been the commitment applied to maintaining export-grade hygiene by GoG has been crucial to this export success. The Ministry of Health and Fisheries Division continue to work together to maintain Grenada’s status as a high quality exporter of seafood – the Grenada “brand” is believed to be strong in the USA, the major recipient of Granada’s fish exports. In 2005 Grenada was placed on the FAO “list 1” of HACCP accredited countries, and subsequent support for the Grenada competent authority has allowed the country to graduate to the EU “List 1” for fish quality & hygiene standards, including key aspects such as laboratory accreditation, etc.

The Domestic market

Where domestic marketing is concerned, this ranges between direct sale from the boat, sale through middlemen traders or the more formal approach of selling though a conventional retail fish market (eg the fisheries centres described above). The large size of much of the catch means that butchering is required before sale and this favours the more formal arrangement, especially in the larger urban markets.

2.2 Legislative Framework

From a legislative perspective, the fishery is governed by the Grenada Fisheries Act of 1986, subsequently adjusted by an Amendment Act of 1999 (which mainly concerned exportable seafood products, and helped Grenada’s accession to the EU “list 1” for fish export). Essentially these acts provide a comprehensive set of instruments that allows the Fisheries Division (or in some cases the Minister of Agriculture) to manage and regulate Grenada’s fisheries. One key aspect is outside the

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1 The EU merged the lists “1” and “2” of third countries authorised to export fishery products to the European market in 2010. The list 2 was a derogatory list of countries expected to reach the merged list 1 or to be delisted.
Division’s remit – fish hygiene - which comes under the auspices of the Ministry of Health, acting as Competent Authority in this regard (as established in the subsequent Amendment Act of 1999). The key instruments involved are set out in table 6.

Table 6: The Principle Legislation that applies directly to the Fisheries Sector

<table>
<thead>
<tr>
<th>Instrument</th>
<th>Date</th>
<th>Specific Designation</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Fisheries Act</td>
<td>1986</td>
<td>Act no 15, 7th April 1986</td>
</tr>
<tr>
<td>Grenada Fisheries Act*</td>
<td>1999</td>
<td>Act no 1, 9th April 1999</td>
</tr>
<tr>
<td>Related fisheries regulations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fisheries Regulations</td>
<td>1987</td>
<td>SRO^ 9, 5th June 1987</td>
</tr>
<tr>
<td>Fisheries &amp; Fisheries Products Regulations</td>
<td>1999</td>
<td>SRO 17, 30th April 1999</td>
</tr>
<tr>
<td>Fisheries (Amendment) regulations</td>
<td>2001</td>
<td>SRO 2, 2nd February 2001</td>
</tr>
<tr>
<td>Fisheries (Marine Protected Areas) Regulations</td>
<td>2001</td>
<td>SRO 78, 28th December 2001</td>
</tr>
</tbody>
</table>

* The Grenada Fisheries Act and regulations have become part of the OECS Harmonized Laws

^ SRO: Statutory Rules & Orders

Related Acts & orders: There are a number of other acts which impinge upon the fisheries sector, although their principle focus may be elsewhere. Chief amongst these are. Grenada Territorial Waters Act #17 of 1988 Marine Boundaries Act #20 of 1988 (both set up under UNCLOS, and combined in 1989), The Public Health Act. Fishing Vessel Safety Regulations (SRO3 1990) Safety at Sea, The Beach Protection Act (1979, sand mining), Land Development Control Act (1990, coastal development), Town & Country Planning Act (use of the coastal zone), Fisheries (Levera Beach Closed Area ) Regulations of 2010 (protecting breeding leatherback turtles )

Synopsis of the Grenada Fisheries Act, 1986, as amended by the Fisheries (Amendment) Act of 1999. The Fisheries Act is clearly the principal legislative instrument that governs the sector, and so its provisions (summarised in the box below) are central to fisheries management,

Grenada Fisheries Act (1986) Summary of Key Provisions – the Act:

- **Appoints CFO and staff**, guided by a **fisheries advisory committee** (taken from relevant government and private sector entities) who must maintain an active **fisheries management plan**, segmented by fishery and with “optimal utilisation” for Grenada as the goal
- **Allows for regional fisheries agreements** on relevant aspects, especially harmonisation where appropriate
- **Allows for access agreements** for foreign vessels, subject to limits set in the plan and overarching agreements with the flag state in question (though none are currently so licensed). In general foreign aspects are a matter for the relevant Minister, whilst their local equivalents are dealt with by the CFO
- **Stipulates the need for annual fishing licenses for local vessels** (all vessel sizes except for the smallest canoes used for close inshore operations) and foreign vessels, but (i) sets no numerical limits, other than those that might be specified in the fisheries management plan though (ii) does allow for conservation measures (closed seasons, gear specification like mesh size, protected areas, minimum size etc)
- **Stipulates the need for fish processing licenses**
- **Local autonomy**: allows for designating **local fisheries management areas**, able to make bylaws as long as they don’t conflict with the Act
- **Zoning & MPAs**: Allows the establishment of fishing priority areas, marine or foreshore aquaculture sites and marine protected areas.
- **Prohibits destructive fishing methods** (explosives & poisons) and possession of illegal gear (eg nets below minimum mesh size)
- For **MCS**, **specifies enforcement measures** including inspection without warrant of vessels and
The main changes set out in the **Fisheries (Amendment) Act** 1999 are to insert a section covering **seafood hygiene**, assigning responsibility to the Ministry of Health where the Chief Public Health Inspector becomes the Competent Authority able to regulate all post harvest aspects. Under the Public Health Act, this also designates specified fisheries officers as fish (hygiene) inspectors. The allows Grenadian exporters to export fish (but not shellfish) to the EU (effectively meaning Martinique in this context, as a Department of France)

The **Fisheries Regulations** are the other principle legislative instruments, interpreting the act in terms of specific, applicable, requirements. Relevant aspects of the key 1987 and 1999 regulations include the following:

- **1987 regulations**: define licensing requirements, segregating fishing vessels (foreign and national) into size classes, as well as specifying licenses required to process fish, tranship fish between local vessels and to trade fish (import or export)
- **Subsequent regulations** (i) the 1999 Fish & Fishery Products regulations primarily concern seafood trade and the hygiene aspects implicit in this (ii) the 2001 Fisheries (Amendment) Regulation bans the use of trammel nets whilst (iii)The 2001 Fisheries (Marine Protected areas) Regulations: defines marine parks (public access), marine reserves (managed for conservation) and marine sanctuaries (only scientific access). Specific restrictions set by the regulations are given in the box below

### Key Publicised Regulations for endangered stocks in Grenada

- Lobster Closed season: 1st May to 31st August
- Turtle Closed season: 1st May to 31st August
- Turtle egg prohibition on any harvest of any species eggs
- Sea Urchins (“Sea eggs”) closed fishery – total ban
- Conch minimum size limit - 18cm shell or 225gm weight

The **Fisheries Advisory Committee (FAC)** was set up as required by the Act and has been maintained although how effective it is has been challenged by some stakeholders. The FAC includes the Permanent Secretary from the Ministry of Agriculture (as the FD's parent Ministry), the CFO as its secretary, a senior representative from the artisanal fisheries segment and 3 people from the commercial or professional fisheries segment. The Minister is free to appoint more candidates of his choice, but if he doesn’t, then the fishing industry (commercial & artisanal) is in the majority

### 2.3 The Institutional Context: The Fisheries Division

#### 2.3.1 Staffing and Structure

Grenada’s Fisheries Division is institutionally located within the Ministry of Agriculture, although it operates with a degree of autonomy. The Division has a staff of 44, with a full complement of 47 as three positions are currently vacant. Table 7 sets out how the staff are currently deployed, showing grades and key responsibilities for senior staff. Apart from the Chief Fisheries Officer, there are currently 3 first grade Fisheries Officer positions (one currently vacant) and 6 second grade Fisheries Officer positions (again one vacant). A number of officers on contract make up the balance of the complement. Two clear weaknesses in the system are evident: the lack of (i) senior stock assessment/biological research expertise (an acknowledged deficiency, see below) and (ii) aquaculture expertise, although there is seemingly little immediate justification for the latter services as yet.

The table shows that the bulk of the staff (33 or 75%) are “front line” ie deal directly with fishermen as extension workers or with both industry and the wider public in the Fisheries Centres. Three senior
staff have also been trained as fisheries hygiene and health inspectors in line with the shared responsibility between Fisheries Division and the Ministry of Health for fish product hygiene (especially for exports).

**Table 7: Grenada Fisheries Division – Senior Staffing and Functional Analysis**

<table>
<thead>
<tr>
<th>Post &amp; Grade</th>
<th>Staff no</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chief Fisheries Officer</td>
<td>1</td>
<td>Planning, Development, Management &amp; Coordination</td>
</tr>
<tr>
<td>Fisheries Officer I</td>
<td>1</td>
<td>Quality Assurance &amp; Administrative Assistant</td>
</tr>
<tr>
<td>Fisheries Officer I</td>
<td>Vacant</td>
<td>Fisheries Biology (Stock assessment &amp; management)</td>
</tr>
<tr>
<td>Fisheries Officer II</td>
<td>1</td>
<td>Fisheries Biology (Stock assessment &amp; management)</td>
</tr>
<tr>
<td>Fisheries Officer II</td>
<td>1</td>
<td>Communication and coordination of MPA strategy</td>
</tr>
<tr>
<td>Fisheries Officer II</td>
<td></td>
<td>Fisheries Biology (Stock assessment &amp; management)</td>
</tr>
<tr>
<td>Field Fisheries Officers I &amp; II</td>
<td>3 (plus 1 vacant)</td>
<td>District extension supervision</td>
</tr>
<tr>
<td>Fisheries Officers (reefer)</td>
<td>2</td>
<td>Maintenance of refrigeration systems</td>
</tr>
<tr>
<td>Fisheries Officer II</td>
<td>Vacant</td>
<td>Communication and promotion of aquaculture activities</td>
</tr>
<tr>
<td>Officers on contract</td>
<td>2</td>
<td>Supervise MPA operations</td>
</tr>
<tr>
<td>Secretarial &amp; clerical</td>
<td>4</td>
<td>Secretarial, biological &amp; vessel registration data entry</td>
</tr>
<tr>
<td>Fishery Centre staff:</td>
<td>28</td>
<td>Operations at fish market centres</td>
</tr>
<tr>
<td>Total</td>
<td>44</td>
<td>(full complement 47)</td>
</tr>
</tbody>
</table>

Source: Fisheries Division

### 2.3.2 The Fisheries Division Budget

Divisional accounting is handled by the Ministry of Agriculture. Their accounts show that Fisheries Division’s annual cost has varied between $EC 600,000 and $EC 970,000, depending largely upon the extent of capital investments taken on. Recurrent costs have been less volatile, ranging between $EC 300,000 and $EC 500,000 annually. As an indicative measure of cost effectiveness, total costs represent some 2% of the first sale value of landings (and much less of the final sale value). Recurrent costs represent only 1.0-1.7% of first sale landings values.

### 2.3.3 Staffing vs requirements

The 2009 JICA Masterplan Study looked at one aspect of staffing in particular – that concerning data and fisheries information systems. This concluded that the competent available staff at the time of 19 was 3 short of requirements pointing to a staffing gap of 16%. If this is taken as indicative for the Division as a whole, then the implication is that there could be an overall staff shortage of 7 individuals.

### 2.3.4 Key Problems and Constraints faced by the Division

Fisheries Division faces a critical overarching challenge that has already been highlighted and is common to most Grenada institutions and indeed those of most of its Caribbean neighbours – how to cope with the full panoply of responsibilities and obligations of a fully functioning state when you are a small island with a limited population and inevitably a limited national budget. This is inevitable and along with many other Grenada institutions, the Division handles the challenge well. That said, there is a number of specific issues that this and other factors generate that do need to be addressed. These are set out below:

- A lack of critical resources, both human and financial, to match the range of tasks that the Division has to take on
A lack of any recent long term training of key staff, although many are well qualified and have benefitted from short term training and the training benefits of participating in various fisheries development projects and workshops.

Data management is another weak area. Whilst landings and socio-economic data is collected and recorded, there is little capacity to analyse and manipulate the data. This means that the understanding of the fishery (the resource and the industry) required for rational management decision-making is often absent.

There is very limited capacity to deal with MCS and related enforcement obligations. Much of this is delegated to the Coastguard or Police, but it does not rank highly in their priorities.

There is inadequate staffing to carryout extension to the desired degree.

However, perhaps the most critical concern is for the near future is the time when the current cohort of senior staff retire (at 60 as required for Grenadian civil servants). Many of the current senior staff are of a similar age and so the threat is of the loss of most of the Division’s collective experience and skills in one go. Succession planning – action to prepare for this is then a crucial concern, and one that highlights the importance of the training requirements mentioned above.

2.4 Grenada’s Membership of Regional/International Fisheries Organisations

2.4.1 International Obligations

Grenada takes its role as signatory to a number or regional and international fisheries conventions and agreements seriously. Table 8 summarises these relationships, indicating the nature of Grenada’s participation and the national institution(s) responsible where appropriate.
Table 8: International Fisheries Conventions/Agreements & Grenada’s Participation

<table>
<thead>
<tr>
<th>Name of Convention</th>
<th>Status in Grenada</th>
<th>Responsible Ministry/Agency</th>
</tr>
</thead>
<tbody>
<tr>
<td>ICRW International Convention for the Regulation of Whaling</td>
<td>Grenada adhered to the ICRW on 7/4/1993</td>
<td>Focal Point – Fisheries Division,</td>
</tr>
<tr>
<td>UNFAO Code of Conduct International Code of Conduct for Responsible Fisheries 1995, including IPOAs-Sharks, IUU, Capacity and Seabirds</td>
<td>Voluntary Code Adopted COFI 1995, of which Grenada is a member.</td>
<td>- Fisheries</td>
</tr>
</tbody>
</table>

Relevant Agreements that Grenada is not party to

- Straddling Stocks Agreement: Conservation & Management of Straddling Fish Stocks & Highly Migratory Fish Stocks
- UN FAO Compliance Agreement: International Conservation & Management Measures by fishing vessels on the high seas
- Inter-American Convention for the Protection and Conservation of Sea Turtles
- Port State Agreement 2009 (New agreement, not yet assessed by Government although they have no objection in principle)
- Ramsar Convention on Wetlands
- CMS / BONN Convention on the Conservation of Migratory Species of Wild Animals

Source Fisheries Division of Grenada – see also Annex 2 for details

Within the wider region and its RFMO’s (Regional Fisheries Management Organisations) Grenada is not a member of ICCAT (International Commission for the Conservation of Atlantic Tunas) although its neighbours (St Vincent, Trinidad, Barbados and Venezuela are). However, through the CRFM’s
observer status, Grenada does have some indirect participatory presence. WECAFC, the Western Central Atlantic Fishery Commission, does not have RFMO status and is more of an FAO regional project. Grenada is also a participant in the CLME Project (Caribbean Large Marine Ecosystem Project)

2.4.2 Regional implications for Grenada

Alongside the major international agreements, there has been a different - and rather more important - regionalisation process underway. This concerns the Caribbean region generally, but is particularly focused on the chain of Windward Islands and the Eastern Caribbean. The most relevant agreements are as follows:

- The CFRM (Caribbean Regional Fisheries Mechanism) based in Belize, with a regional office in St Vincent
- Through the OECS (Organisation of Eastern Caribbean States), the OECS Environmental Sustainable Development Unit (ESDU) based in St Lucia
- Through CARICOM (the Caribbean Community), its Caribbean Fisheries Forum (CFF)
- The proposed Caribbean Community Common Fisheries Policy (CCCFP) the principle of which has been endorsed to some degree by Eastern Caribbean States
- St Georges declaration on the principles for Environmental Sustainability in the OECS

The Caribbean Community Common Fisheries Policy (CCCFP) is perhaps the principle embodiment of this broad initiative, but it is really the assemblage of regional agreements mentioned above that link the islands under the auspices of various aspects of maritime governance. Taken together these agreements amount to a potential close regional relationship for the stewardship of the regions marine resources. As the OECS ESDU points out, most of the required structures for regional management are already in place:

- The Islands’ participation in the CFRM is a statement of regional intent in itself
- The CCCFP has been endorsed in principle by the fisheries divisions parent ministries
- Fisheries legislation has been largely harmonised within the OECS
- The existence of the OECS economic union is itself an expression of political will to cooperate
- The CARICOM single market has allowed the regionalisation of seafood trade
- Two agreements provide the basis for cross-border MCS cooperation
  - The common fisheries surveillance zones agreement (OECS)
  - The common manuals for enforcement and prosecutions (OECS/Cariforum)
- A further set of regional agreements cover many related aspects
  - The St Georges Declaration on Environmental Sustainability
  - The Cartagena agreement (Marine Pollution) SPAW protocol (biodiversity)
  - The Caribbean Challenge agreement – 20% of coastal waters MPAs by 2020,
- Some level of interaction with ICCAT provided through CFRM’s observer status
- The existing Common Agricultural Policy which is mutually agreed, has fisheries components and sets a precedent

The question is then, why has this set of regional initiatives not as yet become a dominant feature of the fisheries policies of the islands? Lack of funds to implement some of the activities required by these agreements is one potential reason. The fact that EEZ boundaries have not as yet been formally agreed between most OECS states is another. However although there is clearly a strong logic for a regional approach, especially regarding resource management, questions can be asked as to whether this is backed by political will. It should be said that the islands do differ considerably and take pride in their autonomy. Furthermore, as far as fishermen are concerned, they feel that they are well able to handle interisland issues informally, based on longstanding traditional relationships. Perhaps the best
way to view these international agreements is that they will only gain wide acceptance where they deliver conspicuous practical benefits such as (i) reducing the administrative burden on the individual countries, (ii) reinforce measures that have to be taken (but face resistance nationally) or (iii) are a conduit to donor funds for their implementation.

### 2.4.3 The Caribbean Community Common Fisheries Policy (CCCFP)

Amongst the international and regional initiatives, the CCCFP is perhaps the most significant. This would provide a strong basis for regional harmonisation across a wide spectrum of fisheries aspects. The essential objective of the CCCFP is regional cooperation for (i) sustainable management of the marine bio-resources so as (ii) to ensure that Caribbean communities receive maximum benefit from exploiting these resources. Whilst sustainable exploitation is one major goal, improving the capacity and earnings and wider benefits for fishermen is also a priority. The CCCFP also aims to promote "competitive trade and stable market conditions" (although those two objectives are not necessarily compatible). The CCCFP is guided by a series of fundamental principles - none of which would conflict with those guiding Grenada’s policy development. These are as follows:

- using the best available scientific information
- applying the precautionary and ecosystem based approaches to fisheries management
- sustainable use of marine resources
- a participatory approach to resource management
- good governance
- and most importantly, subsidiarity (i.e. regional or international bodies only step in where member states cannot act effectively)

Within this framework, the specific declared objectives of the CCCFP Agreement include:

- promoting the sustainable development of fishing and aquaculture industries
- developing harmonised measures and operating procedures for sustainable fisheries management, post-harvest practices, fisheries research and fisheries trade and administration;
- preventing deterring and eliminating IUU fishing and establishing and maintaining MCS systems;
- integrating environmental, coastal and marine management considerations into fisheries policy so as to safeguard fisheries and associated ecosystems from anthropogenic threats and to mitigate the impacts of climate change and natural disasters;
- strengthening, upgrading and modernising fisheries legislation.

However, this policy framework is only part of the CCCFP – much of its content is expressed through a series of additional treaties (‘protocols’). Article 20 of the agreement sets out a lengthy list of topics for which parties are to prepare protocols, including the following:

- Research on fisheries and associated ecosystems
- Harmonisation of fisheries legislation
- Cooperation in monitoring, control and surveillance to combat IUU
- Establishment of a common fisheries zone
- Aquaculture
- Establishment of a regional fisheries management organisation or arrangement
- Hygiene and food safety
- Data and information sharing
- Enforcement
- Common access to regional EEZs
Settlement of disputes

Any other matter for which protocols are necessary for the implementation of this Agreement

It is important to note, however, that the CCCFP may not be implemented immediately in full – notably it is reported that issues related to common access and fisheries zones have been put aside for the moment. Certainly, in Grenada as in other islands there is little enthusiasm for a regime of common access. There is also a requirement to establish or designate a regional organisation as the ‘competent agency’ for implementing the Agreement and the protocols (it is likely but not certain that CRFM would be designated as the competent agency).

Clearly this implies some significant burden on Fisheries Division regarding the harmonisation of legislation, data gathering and sharing, MCS protocols and activities and monitoring etc. However, the current status of the CCCFP is that as yet, the agreement has not entered into force. The draft Agreement has been approved by the CRFM Ministerial Council, but still requires consideration by the CARICOM Council for Trade and Economic Development and the CARICOM Legal Affairs Committee, approval by the CARICOM Conference of Heads of Government and then signature by eight CARICOM Member States.
3. Key Steps for Formulating the Policy

The sections above have provided a context for formulating the policy, based upon the best quantified data available. This section takes the process forward through a more qualitative approach which is essentially based on a review of the priorities of key stakeholders. The starting point is the vision of the Ministry of Agriculture and its Fisheries Division for the governance and development of the sector. This is followed by a summarised report on the findings of the stakeholder consultations.

3.1 The National Policy Framework

3.1.1 Key National Priorities

The Government has a vision for the development of the fisheries sector, and this has been embodied in the various documents that form a policy framework and in the priorities articulated by Fisheries Division. National overarching policy objectives of the Ministry of Agriculture have been set out in the draft paper on Modernising Agriculture in Grenada as follows:

- Promoting economic growth
- Reduction in poverty
- Achieving fiscal stability
- Improving food security

The main national priority here is clearly development, this being a critical objective in itself and potentially crucial for the other objectives of poverty reduction, sound finances, and food security. What is not highlighted here is the sustainability/environmental dimension, and indeed the development/sustainability dichotomy is a theme that recurs repeatedly in this analysis.

Where fisheries are concerned specifically, current thinking can be linked to the Grenada Fisheries Management & Development Plan of April 2002. This sets out a series of strategic objectives that are specifically focused on the fisheries sector, which were, in order presented, as follows:
When the debate narrows to the fisheries sector itself, quite clearly sustainability and the environment have become a much higher profile issue – expressed in terms of both national and international governance responsibilities. Furthermore, another key aspiration emerges – the desire to encourage fishermen to take responsibility for managing the resource they depend upon. This ambition to devolve management down to the fishing community itself also recurs regularly in subsequent analysis, and emerges as a major theme for the future.

3.1.2 Fisheries Division’s Aims & Aspirations

Fisheries Division are particularly important stakeholders from a policy viewpoint – it will be their responsibility to implement the policy in due course. Their current thinking on the matter must then carry substantial weight, and is set out in some detail below. The Division, led by the CFO, has a clear vision of its priorities, and the more important aspects of these are set out below. Briefly, key aspirations are:

- Enhancing the capacity of the staff of Fisheries Division, especially in the resource monitoring and analysis (stock assessment) field. In this connection, succession planning within the Division is emerging as a key priority (as discussed above)
- The promoting and fostering of fishermen’s organisations (associations and cooperatives) and revitalising the established but currently defunct NFO (National Fishermen’s Organisation) with a view to eventually evolving national co-management systems
- Enhancing the national MCS capacity, but doing so as much through education rather than use of the “big stick” of enforcement. Self regulation is the long term goal, and this ties in well with the preceding aspiration
- National fisheries resource assessment capacity needs to be improved with a particular focus on the key stocks, and especially those that are within Grenada’s practical management remit – ie demersal fisheries where recruitment is local and thus Grenadian action has direct national benefit.
- Continuing the policy of “abiding by” guidance from regional/international bodies for high seas pelagic highly migratory stocks where management cannot be effective without an international cooperative accord
Expanding the concept of integrated coastal zone management (CZM), especially regarding MPAs, given the need for an overall ecosystem-based approach. The competing – sometimes conflicting – demands on MPAs and the importance of including terrestrial factors (e.g., sand mining, mangrove destruction, as well as local eutrophication and silting from run-off from poorly conserved watersheds) underpins this. Responding to the need to engage civil society as well as national education and publicity as catalysts in this process is seen as essential.

Quality control, especially regarding the expanding and supporting the increasingly important seafood export segment has been and remains a key priority. The substantial contribution seafood now makes to Grenada's exports is seen with pride as a vindication of this commitment.

Grenadian fishermen need to be brought more into mainstream society. This means measures such as (i) developing better social security provisions for fishermen, through institutions such as the NIS (National Insurance Scheme) or (ii) coupled with this, devising effective schemes for fishing vessel insurance. This had been tried in the past but suffers from very high premiums due to the high risk of vessel loss or relocation. Currently premiums are so high that fishermen prefer to simply take the risk.

There needs to be a pragmatic stance concerning aquaculture in spite of its current marginal importance. This would involve taking pre-emptive action to prepare for times when depleted wild stocks and rising demand make aquaculture an increasingly attractive option. Sea moss is seen as a possible early contender for viable development.

3.2 Guiding principles: the Regional and International Priorities

There are numerous policy-focused documents available, many concerning the Windward Islands or wider Caribbean. They collectively define a set of common principles that guide policy formulation within the broad fisheries sphere. Whilst their aspirations are wholly laudable, the degree to which they can all be related to what is practically achievable is perhaps open to question. These principles, as they apply to Grenada, are summarised below.

The national aquatic bio-resources should be exploited to best foster Grenada's national interest, as expressed through the country's broad development aspirations and improved livelihoods for Grenadians.

These resources should be exploited sustainably, as exemplified by the FAO Code of Conduct for responsible fisheries, with a view to maximising the long term benefit of the Grenadian populace.

A holistic ecosystem approach which recognises the importance of the wider biosphere interactions including the coral reefs, seagrass beds, mangroves, and the terrestrial watershed should be adopted.

In this connection, the importance of maintaining the quality of the environment as an essential prerequisite for human wellbeing generally is recognised, including the risks inherent in climate change and other major human-induced impacts.

There should be equitable access to the aquatic bio resources by Grenadians, taking due account for the range of diverse interests dependent upon these resources in varying ways and to varying degrees.

Grenada should maintain its responsible stance to adhering to its international obligations regarding exploiting aquatic resources, especially those enshrined in formal regional and global agreements.

Management of these resources should reflect a fully participatory approach where the full range of stakeholders are consulted on proposed management measures.
3.3 Stakeholder Consultations

A major priority for the development of this policy has been stakeholder consultation. The participatory approach has been central to the underlying methodology for the policy development process. Accordingly, close attention has been paid to both the institutional level (government agencies and organisations representing key players in the sector) and the individual key players themselves who were consulted at a series of group meetings. To this end two types of consultation were held in Grenada from mid April to mid May 2012. These were:

- **Nine key stakeholder focus group meetings** were held involving the broad spectrum of potentially interested parties from fishermen’s associations and processors to aquatic tourism operators. In each case comments were noted and the sessions concluded with a consensual resolution of the multiplicity of points raised, these being expressed as a limited number of key issues. A series of common priority issues emerged after analysis of all the meetings and these formed the basis for subsequent consultation.

- **Four Community Consultations** were held in the more important fisheries centres in Grenada (Grenville, Gouyave and St Georges) and in Carriacou. A number of fishermen and other frontline stakeholders were involved, and the principle business of these consultations was eliciting responses from these fishermen and other invited stakeholders. The policy development process was explained, the initial priorities already identified presented and though a knowledgeable facilitator, responses elicited.

The recorded responses have been analysed and the results are shown in Table 9. This shows the results of both the key stakeholder focus groups and the community consultations as well as a combined value – all based upon the frequency of occurrence for the issue in question. In total some 35 discrete issues of varying magnitude emerged, but only 17 of these were raised more than once – and these are listed in the table. However, despite the diversity of the responses, they essentially spoke of four key areas of concern as follows:

<table>
<thead>
<tr>
<th>Broad Areas of Concern</th>
<th>No of issues raised</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fisheries management issues</td>
<td>12</td>
</tr>
<tr>
<td>Resource sustainability and environmental aspects</td>
<td>9</td>
</tr>
<tr>
<td>Commercial fisheries - processing &amp; export related aspects</td>
<td>7</td>
</tr>
<tr>
<td>Artisanal fisheries – subsistence and social issues</td>
<td>7</td>
</tr>
</tbody>
</table>

The reactions to each specific issue naturally differed between stakeholder groups, and there were clear areas of conflict (perhaps better stated as unresolved recognition as to where common benefit lay). Some interpretation is then required, and this is done below through a brief synopsis of the seven most prominent issues.

1) **Resource status/overexploitation**: was generally not seen as a pressing issue by most fishermen, although there was acceptance that some demersal stocks could be threatened (as they had been in the past). Where large pelagics were concerned, few saw any problems and believed catches could be increased. The tourist industry and civil society stakeholders took a diametrically opposite view, regarding conservation, especially of high profile species such as turtles as an imperative.
2) **Rationalising the concession system**: there was some acceptance of the need to link concessions to formal licensing/registration. However, simplifying the system and shortening the time for rebate payments was much to be desired. One aspect that particularly exercised fishermen was the imposition of new rules on the concession system by Government without prior consultation with them.

3) **Post harvest, marketing & earnings**: There was a clear divergence between fishermen and traders, the former accusing the latter of profiteering. The traders’ response was simply that fishermen had a choice – Grenada has an open market system. On balance fishermen opted the free market system when asked, and this was particularly true for the leading fishermen. Where there was wider consensus was on the importance of the seafood processing and exporting industry, and the need to support this

4) **Licensing & registration** nearly all stakeholders who commented accepted that there needed to be a licensing system and that fishermen should be registered. Linking concessions to licensing/registration was mostly accepted (subject to the points made above) but there was resentment that foreign yachtsmen obtained concessions as a matter of course. Again there was a point common consensus on the need to streamline the system and reduce both bureaucracy and delays in payments

5) **Fisheries associations & cooperatives**: There was wide support for the concept of fisheries associations but little consensus as to how their revival could be achieved. That the associations or cooperatives were mostly performing badly - if at all now - was accepted. Poor management and financial difficulties were seen as reasons for past failures, especially where active cooperatives were involved, with concomitant financial implications.

6) **Safety at sea** was acknowledged as a key concern and an area where the state was right to intervene. However, some flexibility was requested, so that the level of equipment required is more related to the scale of boat involved. Linking equipment concessions to passing safety inspections (required for the license) was problematic as the concessions were essential for equipping the boats so that they could pass the inspection in the first place.

7) **Foreign fishing boats and IUU**: there were mixed responses with some fishermen supportive of foreign vessels in Grenadian waters for the potential safety backup that they can provide and for fear of reciprocal exclusion when they fish in their neighbours waters. Others were apparently concerned at the additional exploitation of Grenada resources. Both views had implications for the Coastguard - the former highlighting its current operational situation (minimal budget for fuel and thus unreliability) the latter the prospect for further demand upon Coastguard services

Some other issues that did not score so highly but did clearly have high policy importance were aquaculture, emerging conflicts between fisheries, tourism and coastal development and the broader developmental agenda

- **Aquaculture**: The potential and possible future need for aquaculture was generally acknowledged, but there was little sign that this was generating interest in investing or participating in aquaculture. Sea moss was seen as the most promising candidate

- **Conflicts between fisheries tourism and development**: Areas of conflict identified mainly centred on the loss of mangroves or beach access to coastal development as well as an array of pollution issues blamed for reef damage and declines in inshore catches. Generally speaking, fishermen, tourist operators and civil society were at one on this point, marina developers excepted of course. Where fishermen and aqua tourism operators diverged most was on the need to preserve “flagship” species: turtles, large bill fish and cetaceans. Throughout, the frequent lack of effective enforcement of existing regulations was cited as a problem – as a failure of both protection and of maintaining the credibility of governance – as well as demonstrating a lack of political will
Strengthening fisheries management in ACP states

- Development is at the centre of Government priorities. However, as a concept, this did not emerge as an imperative for the stakeholders (it is ranked no 18 in the table below). That said, development is clearly a seminal theme that runs through many if not most of the stakeholders' priorities. Indeed the most fundamental divergence of view between different stakeholder groups was essentially that between economic development on the one hand and resource conservation and its sustainable use on the other.

Table 9: Combined Analysis of Focus Groups & Community Consultation Responses

<table>
<thead>
<tr>
<th>No</th>
<th>Key issue</th>
<th>Focus Groups</th>
<th>Community Consultations</th>
<th>Combined</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Resource over exploitation and need for conservation</td>
<td>4</td>
<td>4</td>
<td>8</td>
</tr>
<tr>
<td>2</td>
<td>Reform the license and concession system</td>
<td>3</td>
<td>4</td>
<td>7</td>
</tr>
<tr>
<td>3</td>
<td>Maintain Grenada’s top quality hygiene export “brand”</td>
<td>3</td>
<td>4</td>
<td>7</td>
</tr>
<tr>
<td>4</td>
<td>Full licensing &amp; registration of fishermen</td>
<td>2</td>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td>5</td>
<td>Promote Fishermen’s Associations (CBM)</td>
<td>1</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>6</td>
<td>More rational measures for safety at sea</td>
<td>1</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>7</td>
<td>Need to respond to EU IUU issues in the future</td>
<td>1</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>8</td>
<td>Effective enforcement of environmental laws</td>
<td>3</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>9</td>
<td>Mangrove beach &amp; watershed preservation</td>
<td>3</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>10</td>
<td>Educate fishermen in business practices (NIS)</td>
<td>2</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>11</td>
<td>Support subsistence fisheries Livelihoods</td>
<td>2</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>12</td>
<td>Focus on conflict resolution fishermen vs tourism</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>13</td>
<td>Aquaculture (small scale development)</td>
<td>3</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>14</td>
<td>Research on resource &amp; socio economic aspects</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>15</td>
<td>Integrated CZM applied in fisheries management</td>
<td>1</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>16</td>
<td>MPAs including central dedicated MPA manager</td>
<td>1</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>17</td>
<td>Coastguard capacity needs expanding</td>
<td>1</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>18</td>
<td>Development as the priority</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

3.4 Recent Critical Contextual Changes

One reason why the timing is particularly appropriate now for devising a fisheries policy is a number of fundamental changes that have affected the sector and which have started to emerge over the past decade. These have changed the role of fisheries within the Grenada economy and at the same time have also changed the economic environment within which the fisheries sector operates. Key aspects in this regard are as follows:

- The importance of the fisheries sector has grown
  - The catch has increased
  - It is now making important contributions to the tourist sector (seafood) and the wider economy (exports)

- Fishermen and their segment need – and deserve - to be more valued
  - There is a need to raise the status and commercial abilities of fishermen
  - There could be a need to restrict access to some fisheries in the future
- Licensing & registration is consequently becoming essential
- As is solidarity amongst fishermen, eg through associations

Resource sustainability and wider environmental issues have become more pressing
- Some specific stocks are clearly threatened: eg conch, red hind (grouper)
- Some highly migratory pelagic stocks - which Grenada exploits to a marginal extent - face over exploitation on a global scale with inevitable implications for Grenada.
- The marine environment has become an increasingly high profile issue globally, with knock on effects for Grenada through its international exposure as a prime tourism, retirement and academic destination.

The wider Grenadian economy has been changing
- Tourism has become a significant segment
- Holiday/retirement living has become another important segment:
  - This means that the leisure sector has raised its profile in the economy, with consequences for the way in which marine resources are valued

Much of this is dependent upon aquatic attractions. This has critical implications for the fisheries sector
- The overall state of the aquatic resource is a primary prerequisite for much of Grenada’s tourism, especially water quality, beach and coral reef condition and that of their fauna, the sport fishing targets: large pelagics and high value demersals
- There are key specifics that are disproportionally important in this regards: turtles, trophy billfish, cetaceans. These need special consideration in policy development – a balance issue
- The enhanced demand for prime fisheries products, especially large pelagics (dolphin fish & tuna), crustaceans (lobster & crab), prime demersals (snapper & grouper) is a benefit for the fisheries – increasing demand and maintaining higher prices

At the other end of the socioeconomic spectrum: Fisheries remains an economic fall back for the livelihoods of poorer segments of society. This needs to be fostered – another balance issue

There is a wide range of regional initiatives and potential agreements covering the sector – from the research/academic based to the environmental to those with an underlying regional political theme. These have a positive and negative aspects: on the plus side they provide the basis for improving regional resource management, facilitating seafood trade, legislative harmonisation, and generating a more effective response to IUU. More negatively they impose additional burdens upon national institutions that are already finding it challenging to cope with their day to day responsibilities. This is exacerbated by the generally individualistic stances of most Caribbean islands with deep and broad public resistance to anything they view as excessive relinquishing of national sovereignty.

This highlights another concern – the sophistication of regional structures is greatly mismatched by that at the grass roots level. Thus, there are high regional aspirations on the one hand but limited effective control within the actual fishing communities themselves. Fishermen are not registered, enforcement is weak and indeed there is neither a definitive estimate of the number of fishermen nor of what they are catching. This is not a criticism – it is an inevitable result of a situation where a small island has to cope with the full spectrum of sector governance requirements with limited resources – human and financial. In fact the Fisheries Division does well in the circumstances. However, this does suggest a response to the various regional initiatives – they should be viewed in terms of the degree to which they (i) can lessen the burden on Grenada’s authorities rather than adding to this and (ii) can be interpreted in terms of real practical relevance to the situation on the ground in the islands.
Part 2: The Policy

1. The Underlying Logic for the Policy

This policy seeks to respond to the complex range of opportunities, constraints, impinging factors and other aspects described above. It aims to do so in a manner that is coherent with the broad policy direction established by regional thinking – especially where this is expressed formally through international agreements. At the same time, the policy must fully reflect Grenada’s national priorities, here striking a balance between the fisheries sector and other national interests with an overlapping dependency upon marine and freshwater bio-resources. Finally, a realistic understanding of Grenada’s capacity to implement the policy is essential as setting high aspirations which cannot be met is clearly counterproductive. In all, no easy task, but one given impetus and direction by the collective views of the broad mix of stakeholders whose forthrightly expressed views have provided the essential guidance.

1.1 The Key Policy Issues

Before the process of formulating a policy is discussed, there is value in rehearsing the key issues that will determine its direction, These are a distillation of the points raised during all the consultations, aspects observed during the field work and the collected wisdom of the documentation read. They are expressed as a series of positives and negatives - areas of potential and constraints or problems the fisheries sector currently faces. They are the issues to which this policy has to respond to, and are set out in brief summary form below

**Opportunities**

- The Grenadian catch has risen consistently
- the species composition has reflected an increasing proportion of prime fish
- The fishery has become an increasingly important contributor to the national economy
- The initial experience with MPAs has been positive
- A successful export business has repaid government’s efforts to improve hygiene
- There domestic market for prime fish is expanding due to tourism and wealthy retirees
- There has been overall development of Grenada’s economy with diversified opportunities

**Issues**

- The failure of most fisheries cooperatives & associations
- The absence of comprehensive licensing of fishing boats or registration of fishers
- The lack of effective enforcement of some existing fisheries legislation
- The dependence upon a migratory large pelagic fish stock subject to external factors
- And management of which is largely out of Grenadian hands
A lack of knowledge of the status of key demersal species
- As part of a systemic lack of reliable data on the fishermen and the resource
- Due to Fisheries Division’s inadequate capacity in some areas such as data analysis
- There is conflict of use of marine resources with growing alternative demands (tourism)
- Coupled with further conflicts with coastal development effecting mangroves etc
- There is dependence upon a subsidy system which may be economically perverse
- But increasing costs for fishermen, especially for fuel, partly reflecting choice of engines
- The wide range of regional and international obligations that tax the Division’s capacity
- But don’t necessarily lessen the Division’s burden of responsibilities

1.2 The thinking behind the Policy Statements

In order to make sense of this complex brief, the first priority has been to identify relevant overarching themes that can unify and align policy initiatives. The objective is to find broad areas of common ground so that these policy initiatives can respond through a coherent logical strategy. This ensures that policy elements are aligned as much as possible and also provides some basis for the challenging task of balancing potentially conflicting interests. To this end five key themes were identified. These are listed below, but neither in order of priority, nor as completely discrete, separate entities as there are large areas of overlap between themes

- Enhancing the status and capabilities of fishermen
- Sustainable stewardship & conservation of aquatic resources
- Realising the development potential inherent in the sector
- Maintaining the sector’s role in sustaining livelihoods of the poor
- Generating a positive interaction with Grenada’s wider economic community

Theme 1: Enhancing the status and capability of fishers,

with a view to improving their economic position, their influence within Grenada’s body politic and their role in the wise stewardship of the resources they depend upon. This has six specific implications:

- Licensing and registration: Currently fishing boats should be licensed and fishermen registered. Vessel licensing is mandatory but in practice only partially enforced whilst registration appears to be treated as optional. This is problematic in various ways – (i) there is poor data on the number of fishermen or their location (ii) there is no control over the number of fishermen, which may become important in the future in order to preserve both the resource and fishermen’s incomes (iii) it lowers the inherent value of being a fisherman as this appears not to warrant the status of being registered and (iv) could lead to concerns over the integrity of the concessions system if questions are asked as to whether those receiving concessions are so entitled. The case for rationalising the registration system and applying it comprehensively would then seem to be strong, especially where the commercial (as opposed to the subsistence/artisanal) fishermen are concerned
Fishermen’s associations: Fishermen need to revive their mutual representation bodies in order to allow them to promote their interests effectively within the Grenadian body politic. In the past there have been problems with cooperatives as these sit uncomfortably with the natural commercial independence of fishermen. There could then be a role for Fishermen’s Associations that are largely decoupled from commercial activities, and so less at risk from contentious argument involving money and management. The important thing here so to gain the community cohesion required to allow fishermen to both pursue their joint interests effectively and become organised in a manner that allows them to take more responsibility for their industry. The Caribbean Network of Fisherfolk Organisations (CNFO) is obviously relevant here, particularly in view of its upcoming project.

Improving fishermen’s commercial knowhow: Successful fishermen are mostly highly able practitioners of the industry’s practical skills – but less so when it comes to the commercial aspects. Both are critical for economic success. Enhancing their abilities in this regard will encourage better commercial decision making and thus better earning potential.

Taking more responsibility for the governance of the resource they depend upon. Fishing frequently suffers from the “tragedy of the commons” where the selfish individual can profit in the short term to the long term disadvantage of the many. Reversing this through a community approach has been central to much fisheries governance thinking, albeit often expressed more in pious hope than on-the-ground reality. That doesn’t mean that the concept should be abandoned. Government’s ability (or will) to continue to assume full responsibility for all governance rightly cannot be taken for granted, and there is no doubt that where governance is community based, the prospects for compliance are much enhanced. Fisheries Division’s role in this regard would then become more one of oversight than nagging policeman, in a more mature industry.

Taking more responsibility for their own socio-economic situation. A subset of the previous point is the need for fishermen to take on some of the socio-economic support burdens that tend to be left to the state or – more often – not provided at all. These would include pension provision (eg through the Grenadian National Insurance Scheme NIS) or eventually some viable and affordable form of vessel insurance.

Safety at sea is generally regarded as a government responsibility, achieved through regulation (safety equipment requirements) or back up (the Coastguard). The former tends to be evaded by fishermen, the latter is inadequately funded and cannot be relied upon. Making fishermen more responsible for their decisions in the regard (eg though their associations) could help ensure both better compliance and a better fit between requirements and practical needs. Again government oversight will be essential.

The vision here is for fishermen to take their rightful role in society as both the successful economic contributors to Grenada’s economy (that many of them already are), and responsible empowered masters of their own industry and its resources. Governance should be overseen by Fisheries Division whilst responsibility for this is increasingly adopted by the fishing communities themselves through co-management and community based management. One critical goal here is to improve compliance (seen widely as a current major failure) through the enforcement effects of peer pressure at community level. Another is enhancing fishermen’s status - in their own eyes and those of Grenadian society – as thoroughly worthwhile contributors to the national good.

Theme 2: Sustainable stewardship & conservation of aquatic resources

There is concern about the condition of Grenada’s marine bio-resources, both within the fisheries sector and amongst the wider community. The issues are complex:

The bulk of the Grenadian catch now consists of large pelagic fish which are shared migratory stocks where Grenada’s off-take is tiny in comparison with the total Pan-Atlantic catch of these stocks. This means that, for Grenadians, on the one hand their impact on these stocks is marginal whilst on the other, management of the stocks is largely out of their hands. The implication of this for Grenada is that (i) the catch can probably be increased with little impact upon stocks but (ii) Grenada needs to participate in the international governance framework, including its reporting requirements (iii) Grenada is at risk from global changes in these stocks.
The other catch components – **demersal species and small pelagics** – are largely recruited within Grenadian waters and so the health of these stocks is a domestic matter. That means that Grenada has both the need and the obligation to ensure responsible management of these resources.

**Reliable data is essential for fisheries management.** This is an area where there are weaknesses in the Division’s capacity to achieve the standards desirable. Even definitive estimates of the number of fishing vessels or fishermen are lacking, and whilst catch data is collected, analytical capacity is limited. Key indicators of the condition of the resource such as catch per unit effort (CPUE) are unavailable. In short, the basic essential data is not available and this must undermine efforts to put fisheries management on a sound basis. What is required is a practical, cost effective approach rather than one that is academically comprehensive, set up in the spirit of being “roughly accurate rather than precisely wrong”

The broadening of the Grenadian economy – and especially the rising importance of tourism – has created new and different value criteria for marine resources. Flagship species such as turtles, bill fish and the coral reef ecosystem generally are highly important for some segments of the tourism and leisure industries. The need to conserve them, especially when they are internationally threatened, is gaining increasing prominence

There needs to be a rational response to Grenada’s **international obligations** regarding responsible fisheries governance. This includes those agreements already signed up to and those likely to be adopted in the future. These obligations operate at two levels: (i) international (ie global or Pan-Atlantic conventions) and (ii) regional, exemplified by the CCCFP (Common Fisheries Policy). The question here is where does Grenada’s best interest lie because these agreements can variously impose demands upon the administration or conversely generate significant benefit. The key is to identify how best to respond to each agreement in this light, directing Grenada’s response so as to maximise the benefit/demand balance in Grenada’s favour. Examples might include joining regional representation within international bodies (to increase Grenada’s effective impact, where interests are aligned regionally), or benefiting from shared research programs (to gain the same insights but with reduced costs). That said, the principle of regional harmonisation, especially regarding resource management, MCS and trade aspects should be adhered to because of the obvious benefits of shared management of shared resources and greater impact where regional interests are aligned

**MCS (Monitoring, Control and Surveillance).** There is a global campaign to **reduce IUU fishing (poaching)** and Grenada has good reason to participate in this. The situation is complex, though, with (i) a mix of traditional cross border fishing relationships (ii) a welcome given to some neighbouring fleets for the trading benefits and safety backup that they can provide for Grenadian fishermen (iii) strong justified objections to other IUU vessels and (iv) the periodic lack of effective Coastguard support because of underfunding. It is though the latter aspect – essentially a lack of capacity – which is the defining feature here

**Marine Protected Areas (MPAs)** have so far proved to be a success in Grenada in terms of (i) leading to measurable increases in fish populations (ii) popularity with tourists (iii) reputedly, augmentation of stocks available to fishermen in adjacent waters and (iv) generating a degree of understanding and acceptance of their value amongst fishermen This needs to be built upon to expand the MPA programme in areas where the development potential for tourism/leisure is increasingly outweighing that for fishing. At the same time, this has to be balanced by wide consultation, public education and reasonable responsiveness to established traditional interests. This is in line with the Caribbean Challenge goal of having 20% of coastal waters within MPAs by 2010 to qualify for GEF funding.
The application of a holistic **ecosystem approach** to managing the resource is widely seen as the way forward for complex multi species/multi habitat fisheries. The central concern here is – to what degree is this pragmatically possible, bearing in mind the fact that whilst being an understandably favoured intention, the actual practical applicability of the ecosystem approach does not always match the intention? From a Grenadian perspective, areas where a more ecologically inclusive response of this sort makes best sense is for the demersal and small pelagic stocks where there is at least some possibility of exerting control. In practical terms this would imply (i) managing coastal reefs which are suffering from evident damage that has been attributed to terrestrial run-off bearing silt and nutrients that damage coral, a result of poor land use practices on the watershed. (ii) Countering the loss of mangrove to coastal resort, marina, industrial or housing developments or of beach sand to “sand mining” for construction. Both have crucial implications for fish resources (destruction of nursery grounds), amenity and tourism.

**Theme 3: Realising the development potential inherent within the fisheries sector.**

The value of Grenada’s aquatic bio-resources has become increasingly evident. Given the overarching government imperative for development, a key policy objective must be maximising the national return through rational exploitation of these resources. Rational in this context means ensuring sustainably in terms of both ensuring the resources resilience and the fundamental economic viability of such exploitation. The objectives within this theme can them be coherent with the two preceding themes. In practical terms this implies:

- Continuing to support the seafood processing and export industry, through (i) maintaining and augmenting Grenada’s effective hygiene and food safety regime whilst (ii) minimising the bureaucratic constraints upon the sector imposed by licensing (eg extending licenses duration to provide greater stability and investment options for operators) or through simplifying export documentation where feasible. The guiding principle must be to maintain the good Grenadian seafood “brand” whilst minimising the bureaucratic load upon the industry as much as possible without undermining the brand.

- Aquaculture has yet to contribute significantly to production in Grenada (or in most other small Caribbean islands). There are good reasons for this, relating to site availability, topography and the market. Social attitudes are also important with the view that what comes out of the water is openly available to anyone who can grab it – ie praedial larceny (theft) in the aquaculture context. That said, aquaculture has a role – or perhaps will have a role – when the wild catch fails to supply the market because of either expanding demand or falling wild production. This point may have already arrived for the “sea moss” algae *Gracilaria,* for which there may now be a good case for farming. This is essentially a private sector matter, so how can policy, as an essentially state concern, intervene? The answer is (i) firstly through legislative support to allow licensed proprietorial rights over sites and their crops (ii) to apply the ownership legislation that has been successful in reducing theft of terrestrial farmed produce (iii) devising control measures to prevent the introduction of destructive exotic species or aquaculture diseases and (iv) undertaking trial projects to take the technology through the early risky stages and so reduce this burden on entrepreneurs. This is indeed what the Fisheries Division is doing already.

- The Grenadian fishing industry benefits from subsidies, mostly expressed through reduced duties or tax on imported equipment (eg boats, engines and fishing gear) and key operating inputs (fuel). There are two schools of thought regarding these. Some commentators question (i) the justification for these subsidies, believing that they could be unsupportable were their underlying economics to be analysed with rigour. Others (ii) see a simple pragmatic truth in it being politically impossible to remove them in current economic circumstances. Standing back and taking the global perspective, the general view is that subsidies are generally unhelpful in the long term because of the economic distortions that they generate. Worse still, in the case of “perverse” or “red” subsidies, they damage the resource through encouraging exploitation to rise to levels much beyond those that are logical in economic terms. Consequently Grenada needs to keep their subsidy system under continual review and, if need be, take the tough political decisions if the case for so doing becomes unarguable – on either economic or resource grounds.
Theme 4: Maintaining the sector’s role in sustaining livelihoods of the poor.

Fisheries has had another role in Grenada (as elsewhere) as a traditional fall back for those with little alternative economic recourse. If there is no employment alternative, people can go fishing at a basic level with minimal or low cost equipment. If the catch cannot be sold, it is at least food.

- There is then a segment of the fishery where access needs to be kept open to all Grenadians. Traditionally this has been the inshore small pelagic fishery for “jacks” and “robin” or scads (Selar spp.) which can be caught with relatively inexpensive equipment – eg beach seines and small open boats. Hand lining from the coastal cliffs or from small rowing boats, and spear fishing are other alternatives.

- This generates management challenges, in that as an informal activity it is not documented at all, and so the level of effort is very hard to gauge. Similarly, little is known about the status of the stocks, although historic data does suggest that the small pelagic landings have declined greatly over the past 30 years. Whether this is a function of a stock collapse due to overfishing, a diversion of effort elsewhere (eg to longlining), or some other environmental factor is unclear. However what is obvious is that applying conventional management disciplines to this segment of the fishery will continue to be difficult.

- There is one arena where a management response is required, and that is in connection with aquatic tourism and marine protected areas (MPAs). Some artisanal fishing methods are banned in MPAs (spear fishing) but others aren’t (beach seining as long as this occurs away from the coral reef areas or hand lining from rocky coasts). There is potential for conflict here which can best be defused on both sides through a mix of effective enforcement and enlightened public awareness.

  - Tourist operators need to appreciate that some license needs to be given regarding traditional rights, especially when these don’t undermine the MPAs essential purpose. This way the support of the adjacent community is retained, and anyway these fishing operations can be a tourist spectacle of interest in their own right.

  - The adjacent communities needs to appreciate the importance of the MPA to many of their livelhoods which are, in the long run, dependent upon the tourism or leisure sectors.

  - Some of the more blatantly conflicting activities will need to be curtailed: spear fishing close to tourist beaches is hardly commensurate with wider amenity enjoyment of the reef, quite apart from the potential risk to swimmers. Harvesting turtles in sight of tourists does little for Grenada’s image as an eco-friendly destination. Indeed exploitation of turtles per se could eventually prove counterproductive to the tourism and even the seafood export industries.

  - Conversely, the impact of tourism and related developments upon both the aquatic resource base and the traditional rights of fishermen need to be addressed. Loss of mangrove is a case in point, as is increased sediment run-off from poorly managed developments. Restrictions of access to areas previously used by fishermen for keeping boats or fishing activities is a further source of tension.

Quite clearly this is an area where balance is required. Maintaining this balance is a major challenge for Fisheries Davison and one where the broad national dialogue concerning fisheries policy has to remain open. However the importance attributed by the Division to public awareness and education campaigns is clearly well merited.

Theme 5: Generating a positive interaction with Grenada’s wider economic community.

Grenada’s economy has expanded and diversified over the past two decades. Tourism has been a major factor in this but it is not just tourism – the island’s stability, relatively low crime rate and both natural and cultural attractions have persuaded a range of other groups to choose Grenada. These include holiday homemakers, retirees (especially wealthy Grenadians expatriates cashing in substantial overseas assets to return to Grenada) and academic institutions (St Georges University, a regional centre of medical excellence). The fisheries policy has to accommodate this significant socio-economic change - both the opportunities it offers and the challenges it poses.
Tourism: Grenada has an impressive tourism industry that successfully spans an exceptionally wide range of market segments – from the hugely wealthy to package holidaymakers, and including specialty segments focused on diving, sailing and sport fishing. Informal estimates put the annual contribution to the economy made by the tourist industry as $EC250 million, very approximately 12% of national GDP. To put this in perspective, this is approaching 8 times the first sale value of the entire Grenadian fisheries landings. As marine bio-resources are a leading tourist attraction, the tourist industry represents a stakeholder group who can evidently not be ignored where fisheries policy is concerned. The likely future growth of tourism, coupled with the amenity and leisure demands made by retirees and increasingly wealthy Grenadian nationals means that this is an interest group to whom the policy must respond.

This is a question of balance, a matter touched upon in the previous theme. As already discussed, Marine Protected Areas (MPAs) are the practical expression of the Governments desire to strike this balance correctly. Expanding the MPA concept into new areas is already established as an objective under the Caribbean Challenge agreement which requires 20% of coastal waters to be MPAs by 2020 and this is reinforced by plans to focus on key tourism zones (Grand Anse Bay and Woburn/Clarks Court Bay to the south west and south east respectively). There are important policy implications here and the need to respond to these competing and opposing demands upon the resource seems set to become increasingly pressing. There could then be a need for a strategic retreat regarding the fisheries for some high profile species like turtles.

The tourism-driven market for fish. This is not a one way trade – the fishing industry benefits substantially from tourism and related activities. Demand for prime fish is increased, so helping to keep the price that fishermen receive high. This is a national benefit because it is at least one incidence of Grenada being able to supply the tourism industry without having to import. Ie the fishing sector is enhancing the “internal export” value of tourism by limiting the amount of foreign currency that has to go straight back overseas again for food imports. Widening the appreciation of this benefit would perhaps help fishermen feel more aligned with the tourist sector as its beneficiaries rather than as losing competitors.

These points are collectively the considerations that have guided the formulation of this policy. The intention throughout has been to seek policy themes that augment each other rather than conflict, and so built in the maximum self reinforcement to the system. In short, this relies upon the emergence of a virtuous circle where realisation of common interest at community level fosters compliance, and with it, greater long term sustainability.
2. The Key Policy statements

The logic behind policy recommendations has been set out immediately above. This section seeks to reduce this to a number of relevant statements that express the range of topics encountered in a comprehensible manner. For each policy topic, one or more objectives are described, set under a clear headline. An indication of priority is also given describing each topic as being of high, medium or low priority. Finally indicative scheduling is noted, setting a broad time frame for implementation of the policy actions, describing these as near term (1-3 years) mid term (3-5 years) and long term (5-10 years). The assumption is that after ten years, there will have been significant change for assumptions to be in need of revisiting and policy revised accordingly. The practical steps required to implement the recommended policy actions will be the subject of a subsequent Action Plan to be devised when the policy itself has achieved widespread endorsement.

One of the most important background considerations that has to be borne in mind is the capacity of Fisheries Division and the institutions that it depends upon such as the Coastguard, the Ministry of Health and body politic generally. On the one hand there is every reason to strive to improve performance and widen the Division’s remit where necessary. On the other hand, setting tasks for which the administration is neither equipped for now, nor likely to be equipped for in the foreseeable future is simply counterproductive. Again a balance has to be struck, with aspirations adjusted to account for the realities of staffing and operational budgets.

Table 10: Summary of the Components of Policy: Key Policy Issues

<table>
<thead>
<tr>
<th>Policy Issue</th>
<th>Priority</th>
<th>Timing</th>
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<tbody>
<tr>
<td>Theme 1: Enhancing the status and capability of fishers</td>
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<tr>
<td>1 Licensing and registration</td>
<td>high</td>
<td>near term</td>
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<tr>
<td>2 Fishermen’s associations</td>
<td>high</td>
<td>near term</td>
</tr>
<tr>
<td>3 Improving fishermen’s commercial knowhow</td>
<td>medium</td>
<td>Mid-long term</td>
</tr>
<tr>
<td>4 Preparing for Co-management</td>
<td>High</td>
<td>Long term</td>
</tr>
<tr>
<td>5 Encouraging self sufficiency</td>
<td>High-med</td>
<td>Long term</td>
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<tr>
<td>6 Safety at sea</td>
<td>High</td>
<td>Near term</td>
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<tr>
<td>Theme 2: Sustainable stewardship &amp; conservation of aquatic resources</td>
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<tr>
<td>7 Sustainable use of the large pelagic resource</td>
<td>High</td>
<td>Near term</td>
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<tr>
<td>8 Sustainable use of demersal &amp; small pelagic resource</td>
<td>High</td>
<td>Near to mid term</td>
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<tr>
<td>9 Maintaining effective data collection, analysis and reporting systems</td>
<td>High</td>
<td>Near to mid term</td>
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<tr>
<td>10 A rational response to Grenada’s international obligations</td>
<td>High</td>
<td>Near to long term</td>
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<tr>
<td>11 MCS and reducing IUU fishing in Grenadian waters</td>
<td>Medium</td>
<td>Ongoing</td>
</tr>
<tr>
<td>12 Marine Protected Areas (MPAs).</td>
<td>High</td>
<td>Mid to long term</td>
</tr>
<tr>
<td>13 The ecosystem approach to fisheries management</td>
<td>Medium</td>
<td>Mid to long term</td>
</tr>
<tr>
<td>Theme 3: Realising the development potential inherent within fisheries sector</td>
<td></td>
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<tr>
<td>14 Maximising the economic benefit from fisheries</td>
<td>High</td>
<td>Mid to long term</td>
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Strengthening fisheries management in ACP states

### Policy Issue

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<thead>
<tr>
<th>Policy Issue</th>
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<tr>
<td>15 The seafood processing and export industry</td>
<td>High</td>
<td>Ongoing</td>
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<tr>
<td>16 Aquaculture</td>
<td>Low</td>
<td>Long term</td>
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<tr>
<td>17 Subsidies and Concessions</td>
<td>High</td>
<td>Long term</td>
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Theme 4: Maintaining the sector's role in sustaining livelihoods of the poor

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<tr>
<th>Policy Issue</th>
<th>Priority</th>
<th>Timing</th>
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<tbody>
<tr>
<td>18 Fisheries livelihoods for the poor</td>
<td>High</td>
<td>Ongoing</td>
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<tr>
<td>19 Segments of the fishery available to the poor</td>
<td>High</td>
<td>Ongoing</td>
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<tr>
<td>20 Interaction between fisheries and the wider economy</td>
<td>High</td>
<td>Near term</td>
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Theme 5: Generating a positive interaction with the wider economic community

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<th>Policy Issue</th>
<th>Priority</th>
<th>Timing</th>
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<tbody>
<tr>
<td>21 The tourism &amp; leisure industries interaction with fisheries</td>
<td>High</td>
<td>Near term</td>
</tr>
<tr>
<td>22 Preserving high profile species</td>
<td>High</td>
<td>Long term</td>
</tr>
<tr>
<td>23 The tourism-driven market for fish</td>
<td>High</td>
<td>Ongoing</td>
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Theme 1: Enhancing the status and capability of fishers

1. **Licensing and registration**: Currently fishing boats should be licensed and fishermen registered. Vessel licensing is mandatory but in practice only partially enforced whilst registration appears to be treated as optional. In future the objective will be to ensure that all commercial fishermen register as such (commercial fishermen being defined as all those not engaged in rudimentary artisanal or subsistence fishing – i.e. using a motorised boat). Access to concessions should depend upon ability to demonstrate that vessels are licensed and fishermen registered.

   **Priority**: high  
   **Timing**: near term

2. **Fishermen’s associations**: Fishermen will continue to be encouraged to form appropriate associations and supported in this endeavour by Fisheries Division. The emphasis will be on mutual arrangements that generate solidarity amongst fishing communities and allow these communities to act in an effective concerted manner to foster their legitimate interests. The objective will also be to revive the National Fisheries Association as an umbrella organisation to coordinate the community associations and represent the fishing industry as a whole to the body politic. Where practical, these organisations can take on a wider commercial role (e.g. cooperatives) but their primary function will be to represent fishermen’s interests because past problems with more commercially focused entities suggest that caution is warranted. So the proposal is that fisheries associations per se should be de-coupled from cooperatives where these or similar commercial entities are not working well (or at all) so that they can achieve their social and “political” goals of fostering community cooperation and representing their fishermen.

   **Priority**: high  
   **Timing**: mid to long term

3. **Improving fishermen’s commercial knowhow**: developing commercial acumen within the fishing industry is seen as being important for both the individual fishermen’s livelihoods and the industry itself. There will then be support for training and extension in this regard, as means allow

   **Priority**: medium  
   **Timing**: mid to long term

4. **Preparing for co management**: encouraging fishermen to take responsibility for managing the resource they depend upon. It is a long term goal of the authorities to create the conditions that will allow the various fishing communities to play an increasing role in the responsible management of their resources. This will involve devising mechanisms for both community based
management and co-management (where the community partners with Fisheries Division), both of which will require the greater community cohesiveness that policy statement 2 seeks to promote.

**Priority:** high

**Timing:** long term

5 **Encouraging self sufficiency: fishermen taking more responsibility for their own socio-economic situation.** Closely tied in to the previous policy statement is the Government’s desire to see fishermen to take on some of the socio-economic support burdens that tend to be left to the state or – more often – not provided at all. There will then be encouragement for fishermen to join the ranks of mature professions in making pension provisions or being able to ensure the investment they depend upon

**Priority:** high to medium

**Timing:** long term

6 **Safety at sea** for fishermen has been - and rightly continues to be - a high priority for Government. Government role has essentially been that of “concerned adult”, demanding responsible behaviour from fishermen. This has been imposed by a mix of regulation regarding the necessary safety equipment aboard and training in its use. Government should retain this role but with the expectation that the need to police this aspect should diminish as fishing communities become more willing to police themselves in this regard. Government’s role should then become more one of oversight than enforcement, but regulation will remain mandatory. At the same time the likelihood that the Coastguard will be unable to provide a wholly reliable back up in the case of emergency will justify encouraging fishermen to take on this role themselves to a degree through effective communication and mutual support.

**Priority:** high

**Timing:** near term

Theme 2: **Sustainable stewardship & conservation of aquatic resources**

7 **Sustainable use of the large pelagic resource.** The bulk of the Grenadian catch now consists of large pelagic fish which are shared migratory stocks where Grenada’s off-take is tiny in comparison with the total Pan-Atlantic catch of these stocks. This means that, for Grenadians, management of the stocks is largely out of their hands, but Grenada still has a responsibility to play its part in their responsible stewardship. This means (i) collecting basic data (ii) participating in the regional dialogue concerning their conservation (eg at the IATTC through CRFM’s observer status) and (iii) taking action where there is a clear imperative to do so (eg setting a minimum length if excessive numbers of juveniles are being caught)

**Priority:** high

**Timing:** near term

8 **Sustainable use of the demersal species and small pelagic resource.** These species are largely recruited within Grenadian waters and so the health of these stocks is clearly a domestic matter. Improved monitoring of these stocks and regular analysis of the results to provide critical information for decision making must become a priority for the Division. This will require (i) increasing the Division’s capacity to respond to this requirement, possibly in association with St Georges University or another appropriate institution, and (ii) continued active participation in relevant regional resource-focused activities, such as those under way through the CFRM or the CLME Project

**Priority:** high

**Timing:** near to mid term

9 **Maintaining effective data collection, analysis and reporting systems.** In direct connection with the statement above, the Division needs to establish a capable data collection and analysis system. The intention is to have accurate information on the number of fishermen and boats (acquired through a regular census program, assisted by fishermen’s registration) coupled with regular landings data (collected through port sampling). Some catch per unit effort (CPUE) data should be collected for a range of key indicator species as a basic measure of the stock’s
condition, and the analysed results made available regularly. This should be central to the Divisions’ fisheries management planning.

**Priority:** high
**Timing:** near to mid term

10 **A rational response to Grenada’s international obligations** regarding responsible fisheries governance. Grenada’s stance should be one of adherence to the agreements already signed up to, especially those that form the basis for regional solidarity and lead to regional harmonisation of key measures and systems. Where new agreements are concerned there should be a test – whether they provide a clear benefit in terms of either fulfilling key policy objectives or of providing the facilities to allow the Division to do so. The guiding consideration here is the need to match national obligations realistically to the capacity of Grenadian institutions

**Priority:** high
**Timing:** near to long term as opportunity arises

11 **MCS and reducing IUU fishing in Grenadian waters:** Grenada will continue to oppose IUU fishing within the Grenadian EEZ to the extent that national capacity allows. Where regional initiatives provide effective support for expanding this capacity, Grenada will participate accordingly. Involving Grenadian fishermen in the surveillance aspects (reporting possible incidences of IUU) will be encouraged as both a practical measure in itself and in order to reinforce their foreseen future role as responsible managers of their own resource base

**Priority:** medium
**Timing:** ongoing

12 **Marine Protected Areas (MPAs).** The successful start to the MPA program will be followed up with expansion of the Grenadian MPA programme in line with the Caribbean Challenge goal (20% of coastal waters MPAs by 2020). In parallel, the MPAs will be managed in line with the requirements set out in the legislation so that they continue to serve their functions of preserving valuable ecosystems, enhancing fish and shellfish stocks and providing a tourist and national amenity asset. The participatory approach adopted for establishing the MPAs will be continued in the understanding that, without the support of the adjacent communities, the MPAs will struggle to achieve their objectives

**Priority:** high
**Timing:** mid to long term

13 **The ecosystem approach** to fisheries management will be adopted where pragmatically possible. Specifically this will focus on the land-water interface in the understanding that some of the marine problems now evident have their origins in terrestrial events. Key aspects in this regard will be supporting mangrove preservation, opposing building developments and other terrestrial activities that increase nutrient and silt run off or damage the coast (eg sand mining).

**Priority:** Medium
**Timing:** mid to long term

Theme 3: Realising the development potential inherent within the fisheries sector.

14 **Maximising the economic benefit** As a general policy objective, maximising the economic benefit from the aquatic bio-resource for all Grenadian people remains an overriding guiding principle, subject to the wise stewardship of the resource base, as outlined elsewhere in this policy. This does though now require balancing the interests of fishermen with other areas of the economy that rely upon aquatic bio resources, such as the tourism and leisure industry.

**Priority:** high
**Timing:** mid to long term

15 **The seafood processing and export industry.** Grenada’s seafood post harvest industry will continue to be supported through maintaining and augmenting Grenada’s effective hygiene and food safety regime, in cooperation with the Ministry of Health as Competent Authority. The priority will be to retain Grenada’s ability to export to profitable markets and supply well paying but discerning domestic markets through maintaining high hygiene and food quality standards. At the
same time it is recognised that this is essentially an activity undertaken by the private sector, and the need to reduce unnecessary bureaucratic impediments for private operators is accepted

**Priority:** high  
**Timing:** ongoing

16 **Aquaculture.** Although aquaculture has yet to contribute significantly to national production, it is important to prepare for a time when it may do so. Rising demand or failure of wild stocks might lead to such a situation. However, this is another area where the private sector will be the driving force, and the role of Government will be to support the private initiatives through ensuring that there is a favourable developmental environment. To this end, key activities will include

- Establishing ownership rights and the concomitant legislation
- Providing an effective response to praedial larceny
- In line with this, seeking widespread acceptance of aquaculture as a branch of agriculture with a comparable position within the rural economy
- Promoting aquaculture through undertaking trial production of possible contenders
- Setting conditions for land based or coastal aquaculture that reduce environmental impacts to acceptable levels
- Establishing clear procedures for protecting the ecosystem against introduced exotics (ie controls on imported farmed species, disease screening systems)

This will require a phased response, ie action taken when there is a clear need for action because private sector interest has increased significantly, the potential is evident and there is a more certain demand for the products of aquaculture

**Priority:** low  
**Timing:** long term

17 **Subsidies and Concessions.** The Grenadian fishing industry benefits from [subsidies](#), mostly expressed through reduced duties or tax on imported equipment (eg boats, engines and fishing gear) and key operating inputs (fuel). The political case for retaining these is strong, but the economic case is less clear. The latter aspect should then be kept under review to assess whether concessions are merited on economic grounds and especially whether they are encouraging perverse effects (excessive effort, uneconomic practices). As a general principle, accepted worldwide though rarely applied, subsidies should be avoided where possible due to their distorting economic effects. All that said, whilst the subsidy system is in force, it should be managed efficiently, with timely payments made to fishermen, and with the minimal bureaucracy that is concomitant with maintaining its integrity. Vessel licensing and fishermen’s registration should be a prerequisite for receiving concessions

**Priority:** high  
**Timing:** long term

**Theme 4: Maintaining the sector’s role in sustaining livelihoods of the poor.**

18 **Fisheries livelihoods for the poor.** The role of fishing as a traditional fall back for those with little alternative economic recourse is accepted as important. This needs to be provided for, alongside the more economically advanced segments that have developed within the fishing industry. Thus preserving this arrangement will remain a guiding principle throughout the sector’s future development

**Priority:** high  
**Timing:** ongoing

19 **Segments of the fishery available to the poor.** In practical terms, ensuring that the disadvantaged have access to the fishery means preserving segments as their primary domain. Pragmatically, this means those close inshore that can be exploited with minimal equipment. Traditionally this has been the inshore small pelagic fishery for “jacks” (scads, *Selar* spp.) caught by beach seine, hand lining from the coastal cliffs or from small rowing boats, and spear fishing. Currently, economics provides an effective discriminatory mechanism (wealthier, better equipped
fishermen fish further offshore) but where this fails, management measures could be required – such as zoning or banning some activities (eg commercial fishing and export of jacks for long line bait). This should be balanced by generating the understanding amongst this segment of society that MPAs are national assets that need to be respected – backed up by effective enforcement

**Priority:** high  
**Timing:** ongoing

### Theme 5: Generating a positive interaction with Grenada’s wider economic community.

#### Interaction between fisheries and the wider economy

20 **Interaction between fisheries and the wider economy** There is a potential for conflict between the poorer segments of the fishing industry and alternative users of the coastal zone – tourism and leisure operators, marinas and house builders. The fact that the poorer fishermen fish closest inshore exacerbates this. The policy response must be the promotion of a balance between these potentially conflicting interests, implemented though a consultative process. The ability to address the fishermen would be much enhanced by their being represented by an association and this would in turn strengthen their negotiation position with commercial developers. Aspects to address would include MPAs and fishing close to tourist areas. This could require regulation but public awareness and consensus building are likely to be the most effective mechanisms because resolution here depends upon mutual acceptance rather than enforcement

**Priority:** high  
**Timing:** near term

#### The tourism and leisure industries interaction with fisheries

21 **The tourism and leisure industries interaction with fisheries**; The expansion of Grenada’s tourism and leisure industries cannot be ignored, especially given the importance of the marine resources for these industries. The fisheries sector clearly now needs to devise a response to this. For this the MPA programme is at central, and its expansion into key tourism areas such as Grand Anse Bay and the Woburn/Clarkes Court Bay area a significant move in this direction. However the likelihood is that there will be interactions across a wider front and this will mean issues such as the state of the billfish stock, movement and anchorage of pleasure boats, recreational fishing etc. The policy imperative here is for the fisheries authorities to recognise this reality and regard themselves as significant stakeholders in the wider tourism and leisure industries where their voice must be heard

**Priority:** high  
**Timing:** near term

#### Preserving high profile species

22 **Preserving high profile species**. In connection with the previous point, the broadening of the Grenadian economy – and especially the rising importance of tourism – has created new and different value criteria for marine resources. “Flagship” species such as turtles, bill fish and the coral reef ecosystem generally are highly important for some segments of the tourism and leisure industries. Conserving these species for the wider good of Grenada’s economy, possibly through extending bans on their capture. Changing attitudes will be central to this because there will have to be a degree of national consensus if traditional preference for some of these species is to be overturned. Conversely, the Division needs to support the removal of destructive invasive exotic species such as lion fish by any means that don’t threaten the indigenous reef fauna

**Priority:** high  
**Timing:** long term

#### The tourism-driven market for fish

23 **The tourism-driven market for fish**. There is the reciprocal aspect of the economic benefit that the tourism, retirees and holiday homeowners can provide the fisheries sector. The market for fish and especially the prime species that contribute significantly to Grenada’s catch is increased substantially. Both demand and price are increased accordingly. This has implications for fisheries operators in that quality and preservation standards akin to those for export are required. This enhances the need for proper icing of fish and close attention to its treatment from catch to sale. Promoting the realisation of this and backing it up with facilities such as the fisheries centres and their ice plants/fish storage capacity is consequently important

**Priority:** high  
**Timing:** Ongoing
This draft policy is submitted to the Government of Grenada for their consideration. When they are content that it reflects their aspirations and opinions, and those of key Grenadian stakeholders, it will, in modified form, be circulated amongst Grenada’s regional partners so that their views can be incorporated. Finally, the policy in mutually agreed form will be presented and discussed at a validation workshop as a final step in its finalisation and submission to Cabinet for official endorsement.

The Policy will be accompanied by another document, an Action Plan for its implementation. This will be formulated when the final form of the policy has been agreed and will provide a “road map” for the practical steps required to make the policy effective. It will address all the practical implications for implementation and will assess where the broader institutional environment needs to be addressed. This will include aspects such as the legislative framework, funding availability and human resource development requirements. An implementation time frame will be devised, with milestones, and an accompanying monitoring and evaluation programme to assess progress periodically.