



Fisheries certification in the developing world: Locks and keys or square pegs in round holes?



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ABSTRACT

The Marine Stewardship Council (MSC) is the frontrunner in fisheries certification, receiving both extensive support and strong criticisms. The increasing uptake by fisheries and markets (almost 10% of world fisheries tonnage engaged by the end of 2014) has been followed by a widening pool of stakeholders interacting with the MSC. However, the applicability of the MSC approach for fisheries in the developing world (DW) remains doubtful, reinforced by a worldwide uptake skewed towards developed world fisheries. Here, a group of MSC stakeholders, with the aid of an ad-hoc questionnaire survey, reviews constraints to MSC certification in DW fisheries, evaluates solutions put forward by the MSC, and recommends actions to improve MSC uptake by DW fisheries. Recommendations to the MSC include researching and benchmarking suitable data-limited assessment methods, systematizing and making readily available the experiences of certified fisheries worldwide and constructing specific fisheries capacity-building for regional leaders. The MSC can further review the certification cost, especially for small-scale fisheries and, in partnership with other institutions, mobilize a fund to support specific DW fishery types. This fund could also support the development of market opportunities and infrastructures likely to satisfy local conditions and needs. For wider market intervention, the MSC should consider embarking on some form of vertical differentiation. Finally, for fisheries that may never move towards certification, the group identifies tools and experiences available at MSC that can improve environmental performance and governance bearing.

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1. Introduction

Fisheries certification emerged in the 1990s as a non-state, market-driven alternative to address worldwide overexploitation

of fishery resources and degradation of fished ecosystems resulting from absent or ineffective management (Constance and Bonanno, 2000). During a period of market transformations that increased the complexity of supply chains (Oosterveer, 2008) and led to the globalization of the agro-food sector, similar initiatives appeared for other natural resource production systems, like forests (Durst et al., 2006; Bernstein and Cashore, 2007), palm oil plantations (Oosterveer et al., 2014) and aquaculture (Bush et al., 2013a). With hindsight, a common aspect in all these transnational private governance initiatives has been an early choice between two problem-framing logics: the logic of control to ameliorate environmental externalities resulting from business action through

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prescriptive standards; or the logic of empowerment to overcome marginalization of peripheral actors through development solutions adapted by local networks (Auld et al., 2015). This initial choice not only defines the program and priorities of action for each initiative, but also shapes the profile of early constituents and determines the most likely sources of tensions, criticism and institutional concern along its evolutionary path.

The Marine Stewardship Council (MSC) is the clear front-runner scheme for certification of fishery sustainability (Gulbrandsen, 2009; Bush et al., 2013b), using a science-driven environmental standard and a thorough third-party verification process that also audits product traceability to provide reliable information to consumers (Gutiérrez et al., 2012; Agnew et al., 2014). By December 2014, 319 fisheries were formally engaged with the MSC (already certified or in full assessment) representing almost 10% of the world's annual harvest of wild capture fisheries (MSC, 2015). However, uptake has not been proportionate, either geographically or in terms of size of operators. For example, the 18 major producer countries in the world (FAO, 2014), contributed in 2012 similar percentages to the global marine capture fisheries yield and to the total of MSC certified seafood tonnage (75% and 68% respectively). However, these major producer countries only represent in number 37% of the MSC certified fisheries, demonstrating a disproportional importance of few large-scale and vertically integrated operators. More importantly, 9 of these 18 countries (China, Indonesia, Peru, Myanmar, Philippines, Republic of Korea, Thailand, Malaysia and Morocco) do not have any fishery certified thus far by the MSC, making the continental and regional asymmetries particularly acute (in April 2015 a scallop fishery in Zhangzidao Island was the first to be certified in China). The discrepancy is even greater when inland fisheries are considered – in this case only 3 of the 15 major producer countries in 2012 had any fishery certified until December 2014 and only one (Russian Federation) has a certified fishery also operating in inland waters (pink salmon *Oncorhynchus gorbusha* fishery that has recently opted not to seek re-certification).

According to Auld et al. (2015) these distributional asymmetries are predictable for certification schemes that opt for the logic of control, requiring subsequent corrective action. However, balancing accessibility to certification with credibility of the environmental standard is a difficult task. It requires overcoming apparently untenable contradictions between objectives of uptake and rigor (Bush et al., 2013b) while negotiating evolving pressures of market chain actors and NGOs (Bush and Oosterveer, 2015). Here, a group of MSC stakeholders (primarily members of the Developing World Working Group, DWWG, of the Stakeholder Council of the MSC, as well as participants from other governance bodies of the MSC) aims to contribute to this debate by addressing sequentially the following questions:

- What are the main constraints to MSC uptake for developing world (DW) fisheries?
- What is the likely effectiveness of solutions currently put forward by the MSC to DW fisheries?
- What else can be done and will this be sufficient to cover all or most of the DW fisheries?

To do this, the study first reviews literature on the relationship between the MSC and the DW, after providing a brief description of the diversity and current trends in DW fisheries and markets. It then advances with the identification of the main constraints to MSC uptake and the solutions that the MSC has been considering or implementing. The relative importance of constraints and solutions are informed by an ad hoc on-line questionnaire survey to DW fisheries stakeholders. In the final section, possible future paths are

traced, both with respect to solutions that can be pursued under the current operational framework of the MSC and beyond.

2. Developing world fisheries and the MSC

Without seeking a precise definition for the distinction between developed and developing world in terms of fisheries, observing aggregate fisheries statistics and indicators across continents (FAO, 2014) permits some broad differentiation in prevailing world fisheries types and socio-economic realities. The relative importance of small-scale fisheries (SSF, indicated by the mean per fisher annual production and the proportion of motorized vessels in each continent—FAO, 2014) is considerably higher in Africa and Asia than in Europe and North America, with intermediate levels of importance in Oceania and the Pacific, Latin America and the Caribbean. Similarly, there are large regional differences in the relative importance of inland fisheries (indicated by the proportion of inland operating fishing vessels by continent—FAO, 2014), with the highest proportion in Africa, followed by Asia, Latin America and the Caribbean. It is widely recognized that in regions with important inland and coastal SSFs, people are highly reliant on fish for food security and nutrition and are also heavily dependent on fishing as a source of employment (Sale et al., 2014; Béné et al., 2015; Blackmore et al., 2015). These systems are also likely to rely on temporal and complementary production activities (“tri-economy” of fishing, farming and herding—Andrew et al., 2007) and suffer from infrastructural deficiencies that can lead to substantial post-harvest losses (Béné et al., 2010). Despite the higher dependence of such systems on fish, the developed world continues to have a higher annual per capita fish consumption rate on average, with a large and growing share consisting of imports from the DW (FAO, 2014). In the DW, domestic seafood consumption remains predominantly based on locally and seasonally available products, although in emerging economies urban consumers are experiencing an increase in diversity on offer due to imports (FAO, 2014).

It is also important to register that there is no single description of DW fisheries, with distinct patterns at regional and sub-regional levels. For example, in Southeast Asia (SEA), the role of fisheries in providing livelihoods, trade, and food security has become increasingly vital and will likely continue to grow, as will its importance as a producer region. SEA nations account for about one quarter of global fish production, with six SEA nations among the top 20 global producers (FAO, 2014). Levels of domestic fish consumption are also amongst the highest in the world, with per capita annual consumption for the region increasing almost threefold in the past four decades. Along with these sharp rises in exports and domestic consumption, export processing industries in SEA have experienced frequent shortfalls in raw material, driving increased demand for imports of seafood from DW nations outside of the region (Symington, personal observation). Conversely, in sub-Saharan Africa, fish supply per capita has been declining, though dependence on fishing for food and livelihoods remains high particularly in the least developed countries (Béné et al., 2010).

Despite regional variations, the clear global trend is an increase in trade between DW regions and from the DW to the developed world in terms of both the volume and value of the seafood commodities traded (FAO, 2014). High value products are creating increasingly valuable export fisheries, yet many of these source fisheries remain poorly monitored and managed, thus raising the sustainability of DW fisheries as a globally significant issue and increasing the interest in certification. Among the criticisms that the MSC has received over the past two decades, concerns about the applicability of the MSC Standard and the overall MSC approach to DW fisheries have been prominent (Constance and Bonanno, 2000; Gardiner and Viswanathan, 2004; Ponte, 2008; Gulbrandsen, 2009;

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