

Discussion Paper
- Consultant's Findings -

FEASIBILITY REPORT ON THE FISHERIES SECTOR
IN SOMALILAND

Current status, opportunities and constraints



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1. Background

The following study was undertaken with the objective of assessing the development potential of the fisheries sector in Somaliland, in terms of growth potential and actions/interventions required for further development. The assessment is part of UNDP efforts to improve livelihoods and promote economic diversification that forms part of the UNDP Strategy for Poverty Reduction and Economic Recovery (PRER).

1.1 Terms of Reference

(The full TOR for the study is provided in Appendix 1).

Working closely with the Ministry of National Planning and Cooperation, Ministry of Fisheries and other stakeholders, both local and international, involved in the development of the fisheries sector, the consultant was expected to:

1. Review the fishery policy and guidelines, if any, in the ongoing programmes of the Somaliland Administration and other development partners;
2. Assess the current status of the sector in terms of employment, production, local consumption and export;
3. Assess the constraints and potential of the sector as a major source of income and employment generation opportunities for Somaliland;
4. Review the coverage and quality of fisheries statistics, identify major players and suggest steps needed to improve the statistics;
5. Promote dialogue among various stakeholders (administration, NGOs, private sector etc);
6. Examine the impacts of globalization of the fisheries trade and development in terms of economics and other factors including the recommended international standards, practices, processing and handling of fish and fish products;
7. Outline major steps to be taken to promote this sector in relation to its potential;

2. Introduction

2.1 Location of Somaliland

The Republic of Somaliland is situated on the Horn of Africa. Its boundaries are defined by the Gulf of Aden to the North, Somalia in the East, the Federal Republic of Ethiopia in the South/Southwest and the Republic of Djibouti in the West. The total land mass area is 137,600 sq. km, with a coastline of 850 km, and EEZ of 70,000 sq. km.

2.2 Characteristic features of the coastline

The Somaliland coast lies in the southern part of the Gulf of Aden bordered by Djibouti in the North-west, at Loado 45° 15' East-west, Northeast by Puntland at Qaw 49° E. The climate is hot and humid most of the year. There are approximately 15 permanent

settlements on the coast. The main economic activities are fishing, salt harvesting, livestock and petty trade. Public services and physical infrastructures have not developed substantially in comparison to settlements on the plateau and thus the coastal communities are currently considered the poorest part of the population.

3. Institutional structures and legislation

Several institutions, both public and private, are involved in the sector. The following matrix indicates names of institutions and their mandates in general:

TABLE 3.1 Matrix of Institutions and Mandates

Institutions	Mandate
1. Public Institutions.	
1.1: Ministry of Fisheries and Coastal Development.	<ul style="list-style-type: none"> • General administration, safe-guarding and development of marine resources. • Undertaking research programmes in order to assess fish stock and establishing the maximum sustainable yield (MSY) that can be harvested. • Formulation of policies and strategies for fishery development as well as conservation of biodiversity and marine habitats. • Formulation of legislation on fishery. • Development of skilled manpower/ personnel. • Development of a system for monitoring marine resources, control and surveillance, and • Establishment of cooperation and coordination of marine resource management.
1.2: Ministry of Commerce and Industry.	<ul style="list-style-type: none"> • Improvement of basic physical infrastructures to enhance private sector investment, economic growth and reduce unnecessary costs. • Formulation of rules and regulations creating favorable environment for trade and investment, such as Foreign Investment Law and Companies Law of Somaliland.
1.3: Ministry of National Planning and Coordination.	<ul style="list-style-type: none"> • Formulation of national development strategies. • Allocation of development resources and sectoral prioritization.
1.4: Ministry of Water and Mineral Resources, Berbera Port Authority and all coastal Municipalities.	<ul style="list-style-type: none"> • Coastal and marine environmental matters, such as terrestrial affluent, untreated sewages, oil pollution and dumping of hazardous substances into the sea or on the coastline.
2. Private Institutions	

2. 1. Gamur Fiberglass Boats Factory.	<ul style="list-style-type: none"> • Produces GRP reinforced fiberglass boats designed for outboard engines.
2.2 Las Qurey Tuna Factory.	<ul style="list-style-type: none"> • The plant procures fresh tuna from local fishermen, processes and markets both internally and externally.
2.3 Red sea, Xeeb Soor and Ximre Fishing Companies.	<ul style="list-style-type: none"> • These are small retailers that supply local markets. They are exploring foreign markets particularly in the Gulf States.
3. Other Partners	
3.1 Regional Organization for the Conservation of the Environment of the Red Sea and Gulf of Aden (PERSGA)	<ul style="list-style-type: none"> • Through its Strategic Action Programme (SAP), the organization provides assistance to the Ministry of Fisheries in conservation strategies of the living marine resources by strengthening institutional capacity of the Ministry, training qualified personnel for field monitoring, data collection, analysis and interpretation.
3.2 Sahel Foundation for Marine Resources	<ul style="list-style-type: none"> • Produces canoes and 5 meter motorized GRP boats. • Conducts training for fishermen and environmental awareness activities.

3.1. Legislation and Policy

On September 1995, Somaliland Law on Fisheries was promulgated to deal with jurisdiction of the Somaliland maritime zone, resources management, licensing and penalties. To strengthen the Law on Fisheries, the Coastal and Marine Resource Policy of Somaliland was approved at the end of 2000. The Policy provides a clear vision on resource development and the conservation of biodiversity. The following is the specific principles and objectives stipulated in the Policy:

- a. Optimizing the long- term social and economic benefits from the coastal and marine environment for Somaliland and its people;
- b. Protecting the rich biodiversity of Somaliland’s marine and coastal environments for present and future generations;
- c. Adopting responsible fisheries practices so as to ensure sustainable use of living marine resources;
- d. Coordinating coastal and marine resource use and planning, at a national level;
- e. Promoting fair, equitable and transparent governance over marine and coastal resources;
- f. Meeting international and regional obligations to marine and coastal matters;
- g. Allocating central budgets for fisheries development.
- h. Developing partnerships with stakeholders, communities and local authorities to achieve optimal management of resources.

4. Description of the fisheries sector in Somaliland

The fisheries sector has historically not been a priority area for the Somaliland people, and hence the agro-pastoral system and livestock sector has remained the economic backbone of the region. Until the droughts in 1974 and 1976, only very few coastal people were seriously involved in the sector. However, as part of an overall Government policy many drought-affected people were resettled along the coast and encouraged to take up fishing. This initiative was followed by the construction of Berbera Cold Storage and the Fishing Centers in Zeila and Berbera. Consequently, an increased trend was observed in fish consumption in the period 1986-1989, even though the Somaliland people remain some of the lowest consumers of fish and fish products.

4.1 The main types of fishing activities

Despite the diversity and abundance of the marine resources available in Somaliland, the sector has still not developed a wide range of fishing activities designed to harvest the variety and diversity of fish species and other offshore resources. The Coastal and Marine Resources Policy in Somaliland identifies five different types of fishing, of which only artisan and industrial fishing is of significance for the sector.

4.1.1 Artisan fishing

Artisan fishing is one of the predominant types of fishing in Somaliland. It operates from 10 coastal settlements on a permanent basis and uses about 450- 500 small vessels of which two-third are motorized and the remaining one-third canoes. The sizes of the boats range from 6.4 to 8.5 meters in length. The size of the available vessels is one of the limiting factors to reach offshore resources and prevents the fishermen from fishing during certain seasons of the year. Traditionally, this sector uses gillnets, hooks for large fish and shark, hand-lines, and to a lesser extent, traps and seine nets.

4.1.2 Industrial fishing

The vessels for industrial fishing are larger and use inboard engines, operating from formal harbors and use equipment of an industrial nature, (collector vessels included). This fishing sector has not previously been of economic significance in Somaliland. During the feasibility study however, there were 36 medium-sized Egyptian vessels operating on the coast west of Berbera. The Ministry of Fisheries and Coastal Development issued fishing licenses to the Egyptian fleet in November 2003. The average monthly catch per vessel is around 30 MT. It is envisaged that the total landing of this fleet would reach 6,480 metric tones by June 2004. Employment and income generation of this fishing sector is limited to 36 fishing inspectors from the Ministry of Fisheries and provides around US\$ 200,000 in royalty fee to the government.

4.1.3 Subsistence fishing

It is not easy to differentiate between subsistence and artisan fishing. However subsistence fishing can be defined as fishing without the use of boats and where the catch is entirely for private consumption carried out on an individual basis. Thus, this fishing activity does not contribute significantly to employment and income generation.

4.1.4 Recreational fishing

This fishing activity is not common in Somaliland.

4.1.5 Experimental fishing

This is an exploratory fishing activity aimed at collecting scientific information, and is only authorized by the Ministry of Fisheries.

5. Fisheries Production

Less than 1% of Somaliland's population is currently engaged in the fisheries sector, and of these most are limited to small-scale fishing. Lack of useable coastal roads, adverse temperatures and on-shore infrastructures are the main problems restricting production, processing and marketing opportunities of artisan fisheries. The narrowness of the continental shelf and the predominantly rocky and coralline bottom limits trawling potential to a few areas. The total fish production in Somaliland reached its highest level this year, but is still below 13,000 metric tons.

5.1 Artisan fisheries

Fresh fish is harvested out of Lodo/Zeila, Berbera/ Karin and Las Qorey. In Lodo/Zeila area, fishermen have penetrated the Djibouti market and sell their fish through informal arrangements. On a daily bases, about 7 boats each carrying 500 kilos of fresh fish cross and market their catch in Djibouti City. In addition, 30- 35 fishermen harvest prawns and crabs near Lodo and market the product in Djibouti through similar arrangements. The indication is that 2,500 to 3,000 kg of fresh fish are exported to Djibouti per day.

Artisan fisheries around Berbera and Karin supply local markets in Burao, Hargeisa, and Berbera through Red Sea, Xeeb Soor, and Ximre fishing companies in Berbera. Discussions with these three fish trading companies indicate a consumption of approximately 100 tons of fresh fish in these three towns per month, making the yearly consumption (9 month fishing season) about 900 tons.

The Las Qorey Tuna Canning Plant is the largest available market for artisan fisheries in the Sanag region. Since the plant started its operations in 2001, more than half of the boats and fishermen in Somaliland work for the plant. During the nine months that small

boats are permitted by the winds to fish, the plant operates at full capacity and processes 16 tons of fresh tuna per day, averaging an estimated 4320 tons per year.

5.2 Industrial fisheries

This sector is not fully developed in Somaliland, however, there are currently around 36 medium-sized Egyptian trawlers fishing offshore in Awdal waters. Reports from the Ministry of Fisheries indicate a catch of 30 tons per vessel per month. It is interesting to observe the dramatic change in fish landings in 2004. Before, the arrival of the Egyptian trawling fleet, artisan fish landings accounted for over 80% of the total landings. Today, the ratio of industrial to artisan landings is almost 2:1.

TABLE 5.1 Fish landings

Fishing type	Area	Landing
Artisan fisheries landings	810 tons (Lodo/Zeila) + 900 tons (Berbera/Karin) + 4320 tons (Las Qurey).	6030 tons
Industrial fisheries landings	Egyptian trawlers fishing offshore in Awdal.	12960 tons
Total landing per year		18990 tons

Landings from shark fishery and other non-traditional marine resources, such as crabs, prawns and lobsters are difficult to estimate, and are not included in the above table. Currently the fishermen are only utilizing the fins from the shark, whereas the meat is thrown back in the sea, a fact that illustrates the current inefficiency inherent in the artisan sector. It is important to note that the 7.5 m and 8 m motorized boats can sustain valuable fishing operations assuming that sufficient supplies and appropriate fishing gear is employed. It is again apparent that the yearly total catch by above sized boats could increase substantially if supplied with required provisions and the development of an effective system of collecting catches.

TABLE 5.2 Distribution of fishing fleet on a regional basis. (No.)

Site	Motor boats	Canoes	Total	Operating	Non-operational	Remarks
Zeila	25	13	38	27	11	Engine & hull damage
Lodo	20	4	24	24	0	Nil
Lughaya	15	5	20	13	7	Engine & hull damage
Bulohar	0	4	4	4	0	Nil
Berbera/Karin	55	24	79	65	14	Engine & hull damage
Mait/ Heis	10	10	20	10	10	Engine & hull damage
Las Qurey/ Elayo	300	49	349	285	64	Engine & hull damage
Total	425	109	534	428	106	

Source: Ministry of Fisheries

TABLE 5.3 Distribution of fishermen.

TOWN	Full-time	Part-time	Looking for opportunities	Total
Zeila	40	20	50	110
Loado	25	50	50	125
Lughaya	85	250	70	405
Bulahar	20	0	30	50
Berbera/Karin	200	120	0	320
Heis	18	0	7	25
Mait	150	90	0	240
Shalco	35	15	0	50
Las Qore/Elayo	1250	50	0	1,300
TOTAL	1823	595	207	2625

Source: Ministry of Fisheries.

On average, there are 7 crewmen on each vessel. Normally, the system of sharing practiced in Somaliland is as follows:

1. Costs incurred during the fishing trip are deducted from the gross sales proceeds.
2. The balance is divided according to a 50:50 ratio, shared between the boat owner and the crew.

6. Fisheries Resources

It is hard to obtain accurate statistical information on Somaliland marine resources for three reasons. Firstly, as mentioned in previous sections, people in this region are pastoral nomads lacking basic knowledge of fishing and have shown a distaste of fishing activities and fish eating. The impact of this cultural barrier is also illustrated by the failure to collect fisheries data for many years and the reluctance of the private sector to invest in the fishery sector. Secondly, all existing marine resource estimates were carried out during the pre-war and hence refer to the overall Somali Democratic Republic resources. Thirdly, Somaliland has not executed research activities during its 13 years of independence. Despite this fact, the coastal reef and offshore fisheries are, according to many accounts, highly productive in terms of demersal and pelagic species, and these resources have significant economic value and potential for development of Somaliland.

6.1 Data analysis

Reports by FAO in 1978-1979, White Fish Authority in 1979 and others like Haakonson and Perieconti are based on resource estimates made by R/V Dr. Fridtjof Nansen and the R/V Zheleznyakov during the 70's and 80's. The annual catch potential, according to the two reports ranged from 180-300,000 MT/year of mixed species. The following breakdown of species shows the details of these resources as estimated by R/V Dr. Fridtjof Nansen's acoustic surveys.

TABLE 6.2 Annual Catch Potential (t) for Somalia

Species	Annual catch Potential (t) for Somalia
Large and small pelagic species	120,000
Demersal species	60,000
Sharks and rays	30,000
Deep and shallow lobster	2,500
Shrimps and prawns	500
Turtle	Not known
Cephalopods and bivalves	Not known
Mesopelagic	Not known

The Somaliland coast is 850 km in length, which is around one fourth of the total length of the 3,300 km, pre-war Somalia. Based on fragmented data obtained from fishermen, the COOPI report on the rehabilitation of artisan fishery around Sahel and Awdal regions and observations made on several landing sites, indicate that coastal reef and offshore resources in Somaliland are highly productive in terms of demersal and pelagic species.

The principal commercial fish normally landed by the artisan fishery sector comprise of many demersal and pelagic species. The most important groups include the following families:

- i. SERRANIDAE: Groupers, Sea basses, Rock cod, Hinds, Combers, Coral trout, Lyretails and Soap fish.
- ii. CARANGIDAE: Jacks, Trevallies, Scads, Queen fish, Runners and Pompos.
- iii. LUTJANIDAE: Snappers, Job fish.
- iv. HAEMULLIDAE: Grunts, Sweet lips, Rubber lips and Hot lips.
- v. LETHRINIDAE: Emperors, Breams, Pig face, and Large eye breams.
- vi. MULLIDAE: Goat fish.
- vii. SCOMBRIDAE: Albacores, Bonitos, Kawa kawa, Mackerels, Tuna and Waho.

The coral reef of the coast of Somaliland is also habitat for other non-traditional marine resources, such as Molluscs and Crustaceans, which accidentally entangle with the nets. Though, the commercial viability of these resources is not known, giant clams, abalones and mussels seem to be prospective.

The harvesting of marine ornamental fish and coral species is another prospective industry in the coastal waters of Somaliland. A seven day biodiversity assessment undertaken between Berbera and Karin (150 km), identified the top ten world traded fish and coral species.

Finally eco-tourism is also very promising business, especially, in the vicinity of Zeila and Loodo.

7. Market Analysis

One principal characteristic of the fishery sector is the highly perishable nature of the resource once it is removed from its natural environment. Bacteria and enzymes rapidly spoil the edible flesh of the fish, especially at the high temperatures that prevail through the year in coastal areas of Somaliland. As a result, both speed and careful handling are necessary in the distribution and marketing process. Fish is similarly difficult and expensive to store over long time. In many coastal areas of Somaliland, quick transportation/distribution, freezing or immediate consumption of fresh fish is virtually impossible. Therefore, current marketing opportunities are very marginal, if not impossible.

7.1 Future local potential

Historically, the people in this region were known for their cultural dislike towards fishing and fish eating habits. However, the introduction of modern fish processing facilities in the mid-80's has had a great impact and changed the biased attitude so that today fish is increasingly eaten by urban populations in many towns.

Interviews conducted in Burao, Hargeisa, Gabiley and Borama all indicate the presence of a high demand for fish products. The three major fish trading companies in Berbera supply around 3-3.5 ton to Hargeisa and 1,5 ton to Burao at present.

7.2 International marketing potential

Somaliland fish products could potentially access the global market for fish. One emerging market is land-locked Ethiopia, with over 60 million people without their own supply of fish products. Another lucrative market for fish exists in the oil rich Gulf States. Projections indicate prospective comparative marketing advantages for Somaliland fish exports in these two regions. The only issue to be conscious about is the emerging impacts of globalization of fisheries trade in general.

7.3 Impact of globalization on the fisheries trade

The intention is not to examine the overall impacts of globalization on trade, but at the same time, it will not be possible to discuss its impact on the fishery trade without highlighting some common issues. The technology information revolution has changed the world drastically and has become a dominant socio-economic wave affecting every corner of the planet. The Internet is changing the behavior of individuals and the arrangement of organizations, adding new dimensions to human ability and expanding the range of opportunities.

This is the phenomenon referred to as *globalization*. Both advocates and critics of globalization agree that it is generating considerable benefits, rapid technological improvements and offering unparalleled opportunities to advance sustainable development. Similarly, both groups concur that the benefits of globalization are unevenly distributed among the poor and rich countries.

The ability of a society to move towards sustainable development is determined by the capacities of its people and institutions. Since the capacities of the people and institutions in Somaliland are weak, fishery trade and development will not currently be competitive on the world market. In addition the fisheries trade has its own unique problems. It is a delicate commodity that spoils very quickly unless it is properly handled and it requires consistent procedures and high quality control mechanisms. In a situation where proper fish handling and storage infrastructures are completely absent, the product is unlikely to meet world recommended standards

As soon as fish is removed from its environment and until it is put in the pan, it comes in contact with a variety of mediums. Unless those mediums are hygienic, it can easily be contaminated. Typical examples of those mediums include: human contact, the deck of boats, landing and carrying boxes, handling and processing premises and packaging materials. The final and crucial factors determining the quality of fish and fish products are the standard of freezing and storage used. Internationally recommended freezing and storage temperatures of fish are between (-45°C) and (-22°C).

In the absence of ice, freezing and storage facilities, and poor awareness in terms of fish recommended quality control standards on the side of the fishermen, the prospects for the development of the fishery trade in Somaliland is weak. In particular, the standards defined by the developed world are difficult to meet. In European countries for example, fish importing agencies need to present a EUR 1 Form, which provides minimum allowable contents of bacteria and other hazardous substances. At this stage it is difficult for the Somaliland exports to live up to those defined standards, especially since there is a lack of authorized veterinarians to certify the products. In conclusion, the barriers are so many and complex, that access to markets like Europe is difficult, if not impossible.

8. Constraints facing the Fisheries Sector

Somaliland possesses rich fishing grounds along its northern coast, which could potentially support a developing fishing industry and contribute to the national food security and socio- economic wealth (Van der Elst, ORI, Durban, S.A). The maximum potential catch that could be harvested from Somaliland's marine resources is estimated to be between 90-120,000 MT a year, but currently less than 5 % of that quantity is harvested by nationals.

Some of the major constraints impeding development of the fishery sector are as follows:

8.1 Natural Obstacles

The coastline is relatively straight and lack natural shelters, protected anchorages and landing sites for artisan fishery. There used to be simple jetties in Zeila, Mait and Las Qore before the war. The jetty in Zeila was made of rocks and cement concretes, but filled by sedimentation. Mait and Las Qore jetties were made of concrete pillars dug in to the sea and roofed by wooden planks. However, currents and lack of maintenances have ruined these facilities beyond repair.

Climatic and oceanographic conditions, and shifting winds cause unpredictable currents and waves, which pose a constant threat to the fishing fleet. Prevailing high temperatures through the year, high humidity and the difficulty in accessing the richest fishing areas accelerate fish spoilage and reduces chances of selling catches.

8.2 Technical Problems

The lack of ice, freezing and cold storage facilities limit the opportunities in the fishing businesses along the entire coast. A number of development initiatives, intended to enhance the fisheries sector were implemented during the Siad Barre regime with international assistance. The most significant development initiatives were the 400 metric ton fish handling cold storage in Berbera, which supported the efforts of FAO/ UNCDF fishing centers in Zeila and Berbera to upgrade artisan fisheries in the area. Another major input was the 400 MT cold storage funded by DANIDA in Berbera in 1986.

Since 1994, limited assistance from COOPI enabled artisan fisheries in Berbera and Zeila to resume fishing activities. COOPI rehabilitated the two fishing centers in Zeila and Berbera, but the amount of ice produced by these two centers is not enough to cover the needs of the vessels. The problems of the Berbera Cold Storage has not been addressed and has reached a point where its rehabilitation seems impossible.

Another serious technical problem is rooted in the introduction of GRP motorized boats in the 1980's. As traditional fishermen lack experience in engine and boats hull maintenance, the scarcity of appropriate workshops with qualified technicians, absence of local shops selling engine spare parts and nets are curtailing the smooth running of the fishing activities. The spare parts are usually over-priced and much time is lost in waiting for delivery, leaving many vessels idle for long periods of time. The cumulative impact of these problems reduces the durability and efficiency of GRP boats in general.

8.3 Organizational Problems

Problems in this section are rooted in the political arena of Somaliland. Since 18, May 1991, when Somaliland declared its independence, it has not attained formal diplomatic

recognition. In addition, the fishery sector faces some unique problems as discussed, which are not shared by other productive sectors of the country. The poor general knowledge of fishery and understanding of the problems in the sector, also contributes to the lack of appropriate data records in the sector and reluctance of private sector investment. Finally, the lack of formal organizational structures, in the form of fisheries cooperatives and the existence of parallel authorities competing with each other, weakens the position and prospects of the sector.

8.4 Fisheries data collection

Another severe problem for the fishery sector is the total lack of statistical data, which could provide the basis for private sector investment. Though, the Ministry of Fisheries and Coastal Development is responsible for data collection, very little has been achieved in this aspect. The problems include, lack of qualified personnel and basic equipments for data collection within the Ministries. It is difficult to manage resources properly without having accurate information on stock sizes, their dynamics and the environment they derive from.

To collect this data, basic primary indicators need to be defined and appropriate measuring boards, scales and species identification catalogs need to be provided to data collectors on the landing sites. During the coastal survey in May 2004, data was collected from Berbera, Lughaya and Zeila under the project “Living Marine Resources Management” funded by GEF and implemented by the Ministry of Fisheries.

9. Government Policies and Development Strategies

Somaliland was emerging from 30 years of political suppression and economic marginalization when it declared its independence on 18 May 1991. The immediate challenges included securing peace and stability in the country; developing functioning administrations in all regions, and rehabilitating the devastated physical infrastructure as a way to revive the shattered economy. Though, the government has reached tangible achievements in the first two areas, the limitation of available financial resources has curtailed the development of the poor physical infrastructure, which again has discouraged domestic and foreign investors.

9.1 Strategy for Poverty Reduction and Economic Recovery (2004-2006).

The government has launched its first Strategy for Poverty Reduction and Economic Recovery 2004 – 2006 (SPRER). The SPRER is an attempt to mobilize popular support for the country’s development process, articulate a long- term plan for achieving these strategies and to provide a guide for formulation of medium- term objectives. The strategy aims to achieve the following national objectives within the coming 3 years:

- Revitalize and restore economic growth in order to generate more income and reduce poverty.

- Improve social services to the people so as to promote sustainable social well-fair,
- Promote good governance characterized by transparency, accountability and discipline.

The SPRER identifies the fisheries sector as a priority sector due to its great potential for generating employment and income, enlarging and enhancing the nutritional intake of consumers, and increasing foreign exchange earnings through fish export.

9.1.2 Policy Objectives

The policy objectives of the strategy for the Ministry of Fisheries and Coastal Development is as follows:

- Maximizing the output of the sector in order to raise the income levels of local fishermen.
- Creating new employment opportunities in the fisheries sector;
- Earning more foreign exchange through the export of fishery products;
- Increasing consumption of fish in the local market.

It is generally acknowledged that the most effective development strategy is to make sure that the fishing industry and its development is led by the private sector, while oversight and resource management is handled by the public and/or academic institutions.

The following priority areas are defined for 2004-2006:

- Rehabilitation of the existing fishing fleet;
- Addition of more boats to the existing fleet;
- Provision of sufficient fishing gear and accessories;
- Improvement of fish handling and processing facilities and techniques;
- Improvement of market outlets both internally and externally;
- Promoting research activities and training of personnel;
- Upgrading existing legal frameworks and formulating other relevant legislatives enhancing sectoral development.

9.2 Enhancing the legal framework

The Ministry of Industry and Commerce has formulated other legal frameworks intended to enhance economic growth and attract private investment, including the Foreign Investment Law and Company Law. These Laws are formulated in the context of the emerging impacts of globalization and designed to create a favorable climate for domestic and foreign private investment. It establishes incentives for investment, including property rights protection, institutional arrangements, defines conditions for investment, investors rights and attempts to reduce the cost of bureaucracy.

In order to promote production, improve living conditions of the people and create job opportunities Somaliland has chosen the promotion of a free market economy as its economic policy. To achieve this objective, the government encourages national and foreign investment in the productive sectors.

The Foreign Investment Law comprises of 25 articles aiming at, promoting, protecting and guaranteeing all forms of foreign investments and personnel. It defines forms of foreign investments and investment priority sectors; establishes Somaliland's Foreign Investment Board and describes its functions. The Law defines procedures for submission and approval of applications and details procedures of investment, transfer of capital and profits.

The Company Act of Somaliland is a lengthy document touching upon all forms of private and public companies. Part one and two deals with the formation and registration of companies, juridical status and membership. Part three deals with capital issues; Part four deals with allotment of shares and debentures; Part five deals with share capitals, its increase, maintenance and reduction.

In its endeavor to promote an open door trade policy, the government is trying hard to create a Free Zone area in Berbera, introduce the "Build Operate-Transfer" procedures; and to join regional and international cooperation schemes.

10. An integrated Development Plan for the Somaliland Fishery Sector

The previous sections of this report have outlined the problems and opportunities facing the fishery sector in Somaliland. It is clear that without appropriate planning for renewed investment in the fishery sector the constraints discussed in section 8 of this report will prevail.

The consultant has assessed the current bottlenecks from a regional and sub-regional perspective. During this process the consultant has reached a number of important conclusions to guide future development efforts:

- Firstly, the consultant believes that any strategy for the future must satisfy the development requirements of each principal fishing center.
- Secondly, the consultant is convinced that the most serious problem for the future development of the Somaliland fishery sector lies with the lack of on-shore fisheries facilities and the inefficiencies in the existing transportation systems.
- Thirdly, the consultant believes that plans for fishery development in Somaliland must be tailored to meet local needs and conditions. Although, coastal fishing communities share a common set of constraints and opportunities, each settlement has its own unique characteristics and constraints.

Thus, the recommended strategy for development of artisan fisheries is composed primarily of two core components: the establishment of fish processing facilities and efficient transportation mechanisms, and the development of an adequate institutional framework to deal with private sector investment.

Activities following this strategy begin with the establishment of five fishing stations as identified in the previous sections of the report. The aim is to create self-sustaining fishing stations equipped with small vessels and essential on-shore facilities to enable increased production and trade. This being the point of departure, the following is the road map for developing the fishery with special emphasis on the private sector.

The government of Somaliland proposes to launch a series of initiatives, with the assistance of the international community, to support fishing communities and the private sector and to foster development strategies in the fisheries sector. Establishment of appropriate institutional mechanisms will facilitate the right platform on which to build business relations between Somaliland entrepreneurs and fishing communities and to encourage regional and international private companies partnerships.

- The first task is to identify prospective national entrepreneurs or companies interested in developing the sector.
- The second task is the forging of close business relations between these companies and the coastal fishing communities.
- The third task will be to identify suitable foreign partners to participate in fisheries investment on a commercial basis (joint-venture agreements).

The following matrix shows the existing facilities and proposed development for each station:

TABLE 10.1 Proposed interventions for the fishing stations/Tuna Canning Factory

Station	Current capacity	Proposed support	Other support
Zeila	1.2 (t) of ice and 2.5 chill-room.	5 (t) of ice and 7 ton of chill-room.	Fishing gear and engine spare parts shops. (Small workshop)
Lughaya	A building for shark washing and storage.	Convert to fishing center similar to that of Zeila.	Fishing gear and engine spare parts shops. (Small workshop)
Berbera	1.5 ton of ice and 5 tons of chill-room	Expand ice to 10 tons and chill-room to 15 tons. - Two collector barges each 10 tons. - Two refrigerator truck each 6 tons carrying capacity.	Central workshop well equipped and managed by qualified technicians.
Mait	Nil	5 (t) of ice and 7 tons of chill-room. 5 (t) refrigerator truck.	Establish shop for fishing gear and engine spares.
Las Qorey	Nil	Omit	Modest workshop and shops for selling gear and spare parts.
Gamur	Produces 5.9 m outboard fishing boats.	Avail marketing opportunities.	Nil.
Las Qorey Tuna Canning Plant	20 tons processing and 8 tons cold storage.	Increase cold storage to 50 tons. Add two to three bigger long-liners capable of fishing under all weather conditions.	Well equipped and staffed with qualified personnel

Appendix 1: Terms of Reference

Position: Consultant – Fisheries Sector
Duty Station: Hargeisa
Period: Three Months

Specific duties and responsibilities:

Working closely with the Ministry of National Planning, Ministry of Fisheries, other partners and stakeholders, both local and international, involved in the development of the fisheries sector, the consultant will:

8. Review the fishery policy and guidelines, if any, in the ongoing programmes of the Somaliland Administration and other development partners;
9. Assess the current status of the sector in terms of employment, production, local consumption and export;
10. Assess the constraints and potential of the sector as a major source of income and employment generation opportunities for Somaliland;
11. Review the coverage and quality of fisheries statistics, identify major players and suggest steps needed to improve the statistics;
12. Promote dialogue among various stakeholders (administration, NGOs, private sector etc).
13. Examine the impacts of globalisation of the fisheries trade and development in terms economics and other factors including the recommended international standards, practices, processing and handling of fish and fish products;
14. Outline major steps to be taken to promote this sector in relation to its potential;
15. Any other duty as assigned.

At the end of the consultancy, the Consultant is expected to prepare a feasibility study report, which should highlight, among other things, the constraints and opportunities to attract private sector investment in this sector and the way forward.

REPORTING:

Soon after the commencement of duty, the Consultant will prepare a work plan according to the TOR in consultation with the Ministry of National Planning/ Ministry of Fisheries / other relevant ministries with activities and corresponding output indicators and submit to UNDP for review and approval. The consultant will also prepare and submit brief monthly progress reports consistent with the work plan.

Appendix 2: Acronyms

IUCN: The World Conservation Union

COOPI: Cooperazione Internazionale,

GEF: Global Environment Facility,

DANIDA: Danish International Authority,

FAO: Food and Agriculture Organization of the United Nations.

UNCDF: United Nations Capital Development Fund,

PERSGA: Regional Organization for the Conservation of the Environment of the Red Sea and Gulf of Aden,

UNEP: United Nations Environment Programme,

MNPC: Ministry of National Planning and Coordination.

MSY: Maximum sustainable yield.

ORI: Oceanographic Research Institute, Durban, South Africa.

CPUE: Catch per unite effort

MSY: Maximum Sustainable Yield.

D.G.: Director General

Appendix 3: References

1. Biodiversity Assessment of the Somaliland coast east of Berbera, IUCN, March 1999.
2. From Ocean to Aquarium, the global trade in marine ornamental species, UNEP, Oct. 2003.
3. Development of artisan marine fishery monitoring, methods and tools, Sept. 1997, IUCN.
4. Coastal and Marine Resources Policy for Somaliland, Ministry of Fisheries and Coastal Development, 2000.
5. IGAD/ UNDP Horn of Africa Programme, Fisheries sector, 1999.
6. Evaluation summary: Project completion report, Somalia Fisheries Exploration/ Pilot Project World Bank (IDA), 1995.
7. Foreign Investment Law and Company Act of Somaliland, Ministry of Commerce and Industry, 2003.
8. Strategy for Poverty Reduction and Economic Recovery Plan 2004- 2006, MNPC,
9. Somaliland Fisheries Law, 1995, MFCD.
10. Project Implementation Plan, GEF and PERSGA, Strategic Action Plan SAP. 1999.
11. Somalia's Fisheries: Case study, Haakonson, 1983.
12. FAO Fishery Statistics Yearbook, Rome, 1989.
13. Fishery Investment Projects, their identification and preparation, FAO Circular NO. 149.
14. A Marine Fishery Policy for South Africa (WHITE PAPER), 5 May 1997.
15. Human Development Index Report, UNDP, @001.
16. Rehabilitation of the fishery sector in NW Somalia, Berbera, 1998: COOPI.
17. Somalia's Fisheries; Case study, Jan M. Haakonsen, FAO; 1983.
18. Developing Capacities for sustainable communities; UNDP Capacity 2015.

Appendix 4: Terms of Reference & Agenda - Workshop on the Fisheries Sector

Terms of Reference
& Agenda

Workshop on the Fishery's Sector

Current status, opportunities and constraints
Somaliland

31 July/01 August 2004, Mansoor Hotel, Hargeisa

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1. Introduction

In support of promoting economic development and diversification in Somaliland UNDP Poverty Reduction and Economic Recovery Programme (PRER) has undertaken a number of activities, including initiating several feasibility studies providing recommendations for the development of specific economic sectors. The most comprehensive study of this kind was provided in the Bertolli Report launched in 2003, identifying a range of economic opportunities in Somaliland including, among others, the livestock, agriculture and the fishery sector. The programme has also launched a series of data collection initiatives through the Somali Watching Brief, designed to provide baseline data for economic recovery interventions.

The assessment conducted by UNDP/PRER on identifying opportunities within the fishery sector in Somaliland, is linked to UNDP's strategic efforts to improve livelihoods and promote economic diversification. The programme promotes the diversification at both the household level and at the macro economic level in an attempt to reduce vulnerability and enhance opportunities for economic growth and recovery. At the macro-level diversification could increase the use of underutilized productive resources and could generate income and employment opportunities such as the fishery sector which holds major opportunities in terms of diversification of the economy and in the economic recovery of the region.

Despite its potential as a major sector of economic development, both as a source of trade and/or for consumption on the local market, the fishery sector remains relatively underdeveloped. As identified in the Bertolli Report launched by UNDP/PRER in 2003, the sector has the potential for expansion, however an increased output would only have an economic impact in the small villages if a ready market is available. Hence, any interventions in the sector would need to consider the mechanisms for allowing the products to access the market, the quality of the products and the policy framework in which such an expansion would operate.

The fishery sector is also a cornerstone in the Three-year Development Plan for Somaliland, identifying priority areas identified by the Ministry of Planning and Cooperation. As stated in the Development Plan the government will put in place measures to enhance fishing development and facilitate private sector development of the industry. The government programme on the fishery sector includes marine resource development, which focuses on the formulation and adoption of a regulatory and policy framework, which could facilitate and attract investment from the private sector. Likewise the three-year plan proposes to focus on data collection of fishery resources, human resource development and the development of facilitative infrastructure.

It is on this background that the UNDP/PRER programme proposes a workshop to present a feasibility study on the current status, opportunities and constraints of the fishery sector Somaliland and to discuss growth potentials in the sector.

2. Objectives of the workshop

The objective of the workshop is to review the preliminary findings of a study commissioned by MNPC/UNDP on the current status of the sector and opportunities and constraints to its growth. The specific aims of the workshop are:

- To review the preliminary findings of the MNPC/UNDP consultant's study on the fisheries sector.
- To facilitate debate across the range of interdependent actors in the sector, including fishermen, fishery cooperatives, fish processing industry, traders and policy makers regarding the development the constraints and development opportunities of the sector.
- To generate ideas from the participants on how to tackle current development constraints within the sector and to identify a way forward, and
- To identify investment opportunities for the private sector and the critical support and interventions needed to attract such investments.

2.1 Expected outputs

It is intended that this workshop will have the following results:

- Produce a revised report that incorporates comments and suggestions of different stakeholders.
- Provide recommendations that can contribute to a road map for action within the sector.
- An action plan on the way forward.

3. Workshop structure

The workshop has been designed to focus upon common problem solving in order to ensure that the workshop produces concrete recommendations jointly owned by a wide spectrum of stakeholders. This format will also encourage community building among those stakeholders who will work together to foster a comprehensive understanding of the need for commercial, technical and policy inputs towards achieving targeted and sustainable development objectives within the sector.

3.1 Structure

The proposed workshop will after the initial presentation and discussions, be organized into three working groups to address different dimensions of the issues related to development of this sector. The three working groups will be supplied with an agenda to facilitate the discussions.

Working Group 1: Artisan and Industrial Fishing:

- Discuss the constraints and opportunities related to enhancing the output of fishing activities in Somaliland.
- Determine if new techniques and/or tools are required or if current methods can be adapted and updated to enhance output.
- Discuss the policy requirements.
- Provide a SWOT analysis of the thematic area.

Working Group 2: Processing and manufacturing:

- Discuss the constraints and opportunities related to enhancing fish product processing infrastructure and manufacturing industry.
- Discuss the policy requirements.
- Provide a SWOT analysis of the thematic area.

Working Group 3: Local consumption and export:

- Discuss and evaluate the potential for enhancing the export and/or local consumption in the region.
- Identify the main constraints for the trade and identify solutions to enhance the export of fish products.
- Discuss the policy requirements.
- Provide a SWOT analysis of the thematic area.

3.2 Participants

The workshop participants will comprise of about 40 stakeholders and experts invited primarily from the following communities:

Government Institutions		Recommended participants
1	Ministry of Fisheries	2
2	Ministry of National Planning and Cooperation (MNPC)	2
3	Ministry of Commerce and Industry (MCI)	2

Other Institutions		
4	Chamber of Commerce	2

Fishing Communities		
5	Las Quroy/Elayo	4
6	Berbera/Karin	4
7	Mait/Heis	2
8	Lughaya	2
9	Zeila	2

Private sector*		
10	Tuna Fish Canning Factory – Las Quroy	1
11	Fiber Glass Boat building factory	1
12	Ahmed Yusuf Dholayare – Giri Fishing	1
13	Hussein jama Abdi – Al –Ximra Fishing	1
14	Farah Mansheye – Almis Fisheries	1
15	Said Abdul Qadir – Mansoor Hotel	1
16	Brahim Said Ismail – FIMA	1
17	Aadan Ahmed Dirie	1
18	Hussein Yusuf Du'ale – Worldwide Fishing	1
19	Hamud Yusuf Qasim – Aidrous Fisheries	1
20	Red Sea Fishing	1
21	Xeeb Soor	1
22	Gamuur Fishing	1

23	Waaheen Fishing	1
* List of companies provided by Chamber of Commerce		
Institutions & Agencies		
24	UNDP	1
25	APD	1
26	ILO	1
27	UNHCR	1
28	UNICEF	1
Total number of participants		37

Invitations has been extended to a wide set of stakeholders to ensure broad representation of different technical, business, legal and policy issues related to the development of the fishery sector.

3.3 Meeting location and agenda

The workshop will be conducted at the Mansoor Hotel on 31 July/01 August 2004.

31 July 2004	
0830	Registration of participants.
0845	Welcome Address: Ministry of Fisheries and Coastal Development – Minister Mohamoud Mohammed Farah (Oday).
0900	Opening: Minister of National Planning and Cooperation – Minister Ahmed H. Mohammed Elmi.
0915	Introduction: Ministry of Commerce and Industry - Minister Nouh Sheikh Omer Sheikh Muse.
0930	Introduction: UNDP/PRER – Mr. KNS Nair
0945	Presentation of “Assessment of the Fisheries Sector in Somaliland” by Mr. Ahmed H. O. Gulaid.
1030	Coffee Break
1100	General discussions of findings
1230	Closing remarks
01 August 2004	
0830	Orientation of group discussions
0845	Group discussions
1000	Coffee Break
1015	Group discussions
1130	Group presentation of recommendations – Group 1.
1145	Group presentation of recommendations – Group 2.
1200	Group presentation of recommendations – Group 3.
1215	Round-up discussion
1230	Vote of Thanks - Chamber of Commerce

4. Preparatory work

Mr. Ahmed H. O. Gulaid, who can be contacted on Mobile number 424074, leads the organization of the workshop.

Please note that no per diems/transport allowances will be paid for participation in the workshop.

4.1 Background materials

The workshop may make use of existing reports and surveys undertaken in recent years, including the Bertolli Report, the Three-year Development Plan (MNPC) and statistical surveys providing important economic indicators to support the discussions. The role of the UNDP/PRER programme is solely to facilitate the workshop and provide data to stimulate progressive discussions.

Appendix 5: Minutes and recommendations from workshop

Notes of Fishery Workshop 31/01 August 2004

31 July 2004	
0830	Registration of participants.
0845	Welcome Address: Ministry of Fisheries and Coastal Development – Minister Mohamoud Mohammed Farah (Oday).
0900	Opening: Minister of National Planning and Cooperation – Minister Ahmed H. Mohammed Elmi.
0915	Introduction: Ministry of Commerce and Industry - Minister Nouh Sheikh Omer Sheikh Muse.
0930	Introduction: UNDP/PRER – Mr. KNS Nair
0945	Presentation of “Assessment of the Fisheries Sector in Somaliland” by Mr. Ahmed H. O. Gulaid.
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1145	Group presentation of recommendations – Group 2.
1200	Group presentation of recommendations – Group 3.
1215	Round-up discussion
1230	Vote of Thanks - Chamber of Commerce

Presentations:

WORKGROUP I: Artisan and Industrial Fishing.

Strengths:

- Traditional skills are available.
- Experience is present, even despite the lack of mapping the fishermen are aware of the best fishing grounds and seasons.
- Easy accessible coastal resources and many different high market value species.
- Pollution free resources.
- Rich coral reefs with high value (aquarium fish) for sales in Europe/Japan.
- Eco-tourism is a potential area of expansion.

Weaknesses:

- Lack of ice for cooling, freezers, refrigerator trucks.
- Absence of appropriate fishing gear and accessories like engine spare parts in the shops.
- Lack of access to foreign markets.
- Lack of fishing centers – 1986-90 Berbera fishing center operational/Zeila about to be opened. FC used to supply on loan spare parts, fuel in need be, water etc. The fishermen sell his products to the center on an agreed amount. The fisherman will receive 75% in

cash and over a couple of weeks he would be able to pay off his debts. The fishing center would also provide the ice.

- Lack of Fishery Coastal Guard to protect the resources from illegal fishing conducted by foreign trawlers.

Threats:

- Lack of Marine Protected Areas. (MPA's), which could attract Eco-Tourism.
- Over-fishing practices caused by larger foreign vessels (trawlers).

WORKGROUP II: Processing and manufacturing.

Strengths:

- The long coastline provides many opportunities.
- The potential of many commercial species (85).

Weaknesses:

- Lack of suitable vessels (capacity). (Size 8,5 m) limited outreach due to the size and capacity of the vessels.
- Lack of enough cold storage. Current capacity 5t (Las Qurey), Berbera no freezing capacity.
- Limited capacity of ice-producing plants.
- Lack of know-how in technical areas of fish processing and handling.
- Limited canning factories, only Las Qurey Plant.
- On-shore infrastructure such as road network for transportation, lack of electricity, lack of water.
- Scarcity of additives, spare parts, tins etc. Long delivery time for these items to the factories.
- No incentives or encouragements – like tax exemption, training, publicity, marketing, and surveys.
- The local market is full of foreign imported fishing products, like canned fish etc.
- Limited access to foreign markets, Letter of Credits, certification, problems due to non-recognition.
- Non-availability of international acceptable certification, which would allow access to other international markets. E.g. no quality control.

Opportunities:

- Potential if investment is attracted.
- Current liberal economic policy prevailing.
- Provision of tax exemption for a short period to encourage local investment.
- Peace and stability is prevailing in the area.
- Research and development to support policy programming. Areas of mapping of fishing grounds, scientific research on fish, market analysis etc.
- Establishment of a Marine Resource Institute.
- Encouragement of importation of fishing gear and related materials, spare parts etc.
- High demand on the world market for fish products. White meat with low cholesterol.

Threats:

- Illegal foreign fishing.
- Dumping of toxic waste.
- Lack of environmental awareness.

WORKGROUP III: Local consumption and export.

Strengths:

- Long coastline with large potential for fishing.
- All kinds of fishing is currently available

Weaknesses:

- Poor training and limited skills in handling.
- Scarcity of ice production in particular in Berbera.
- The standard of the fishing is too low to provide basis for export.
- Lack of investment and encouragement.
- Lack of financial institutions, like banks, access to letter of credit etc.

Opportunities:

- Awareness to enhance the consumption of fish through media campaigns, provide knowledge of preparation of fish (recipes), the health option.
- Enhance the number of fish outlets in the towns – availability of fish.

Threats:

- Trawlers coming in and doing unrestricted fishing.
- Waste of current resources.
- Unrestricted fishing methods.

Closing remarks Chamber of Commerce:

- Strengthen fishing committee within the CC.
- The Committee will present the numbers and recommendations and address the concerns of the fishing community.
- There must be a Fishing Institution established to support the sector.
- The fishing community must stand together and group/form institutions/networks to support each other.
- The CC can help with outside marketing.
- On the 17 August the fourth SL Trade Forum will be conducted. It's a good chance for everyone to present his or her products.
- If you want to sell anything outside it is necessary to show a sample so that the quality can be verified.
- Many initiatives are being done within the region. INFOSAMAK, INFOFISH, INFOPECHE.
- Requesting the UNDP to provide a follow-up. Seminars, information exchange, distribution of the report.

Overall recommendations of the Workshop:

Skills Development	<ul style="list-style-type: none"> - Fishing Methods (Setting nets, stitching nets, new methods for finding and catching high value species, diving skills, shrimp fishing methods). - Handling of catch/hygiene and preservation - Safety at sea/communication - Environmental management/preservation of resources. - Training on processing and handling for the domestic market and export. - Training on packaging and transport. - Training on marketing. - Training on Quality Control
Provision of material support/Support to infrastructure.	<ul style="list-style-type: none"> - Address the lack of available cold storage. - Ice making machines. - Revolving funds to support fishermen
Access to information	<ul style="list-style-type: none"> - The establishment of a Marine Resource Center - Feasibility studies on specific economic opportunities (aquarium fish, shrimp fishing etc.) - Access to economic intelligence related to the fisheries sector.
Access to markets and quality control	<ul style="list-style-type: none"> - Market analysis. - Certification system - Assistance to the Fishing Committee, Chamber of Commerce. -
Enhancing local consumption	<ul style="list-style-type: none"> - Awareness campaign on fish consumption. (Healthy, cheap and tasty) (How to prepare) - Enhance availability of fish products in towns. - Fish restaurants
Policy Development	<ul style="list-style-type: none"> - Development Strategy for the Sector - Certification system for export - Environmental management policy - Establishment of Marine Protected Areas. - Policies to support investment in the sector.

Appendix 6: List of Participants

REGISTRATION FORM – FISHERY WORKSHOP – 31/01 AUGUST 2004			
	NAME	INSTITUTION/COMPANY	CONTACTS
1.	Eng. Abdillahi Abdi Esse	Ministry of Commerce and Industry	
2.	Yussuf Mohamed Mohammud	Chairman of Berbera Fishing Cooperative	447088
3.	Mohammud Dahir Hassan	Member of Berbera Fishing Cooperative	447069
4.	Mohamed Mohamed Timir	Las Qurey Tuna Canning Factory	Ismail25@hotmail.com
5.	Ciise Mohamed Mohamoud	Artisan fisherman – Las Qurey	
6.	Mustafe Arab	Artisan fisherman – Las Qurey	
7.	Mohamed Mohamuud Essa	Artisan fisherman – Las Qurey	
8.	Jama Ahmed Ashuur	Artisan fisherman – Berbera/Karin	447388
9.	Cali Mohamed Ibrahim	Artisan fisherman – Berbera	
10.	Mohamed Hussein Abdi	Artisan fisherman – Mait	
11.	Omar Mohamed Warsame	Artisan fisherman – Mait	
12.	Abdirahman Farah	Artisan fisherman – Heis	
13.	Abdi Garmute Ismail	Artisan fisherman – Lughaya	
14.	C/Rahime Hasan Cali	Artisan fisherman – Lughaya	
15.	Ali Hussein Egeh	Artisan fisherman – Zeila	
16.	Col. Xugen Cige		
17.	Hussein Yusuf	World Wide Fish Export	420764
18.	Mohamed Ismail Elmi	Ministry of Fishing	3236
19.	Aden Elmi Ahmed	Ministry of Commerce & Industry	
21.	Abdullahi Dirie Jama	Secretary General of SL Chamber of Commerce	424045
22.	Fatha Ali Ahmed	Fatha Trading Co.	421342
23.	Ibrahim Saeed	Consultant	426200
24.	Abdulkhader Hashi	Maansoor Hotel	
25.	Cumar Adan	Red Sea Fishing	446841
26.	Adan Dubad	Red Sea Fishing	446726
27.	Adan Ahmed Deria	Businessman	426158
28.	Hamud Yussuf	Aidarous Fishing Co.	421349
29.	Abdelkarim Abdi Adan	UK Representative SL Chamber of Commerce	abdelkarim@somalilandchamberofcommerce.com

			447974120862 412450
30.	Awil Mohammed Farah	DG MNPC	424013
31	Hassan Jama Abdullahi	Director of Statistics - MNPC	523639
32.	Ahmed Yusuf	Giri Fishing/Dried Sea Cucumber	
33.	Ahmed H. O Gulaid "Omane"	UNDP Consultant	424074
34.	Carsten Hansen	UNDP PRER/SWB	412310
35.	Sandra Macharia	UNDP Information Officer	
36.	KNS Nair	UNDP PRER/SWB	