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NEW GUIDELINES FOR THE NATIONAL FISHERY POLICY

PART I ASSESSMENT AND RECOMENDATIONS FOR THE FOREIGN FISHERY POLICY OF GUINEA-BISSAU

VLAD M. KACZYNSKI

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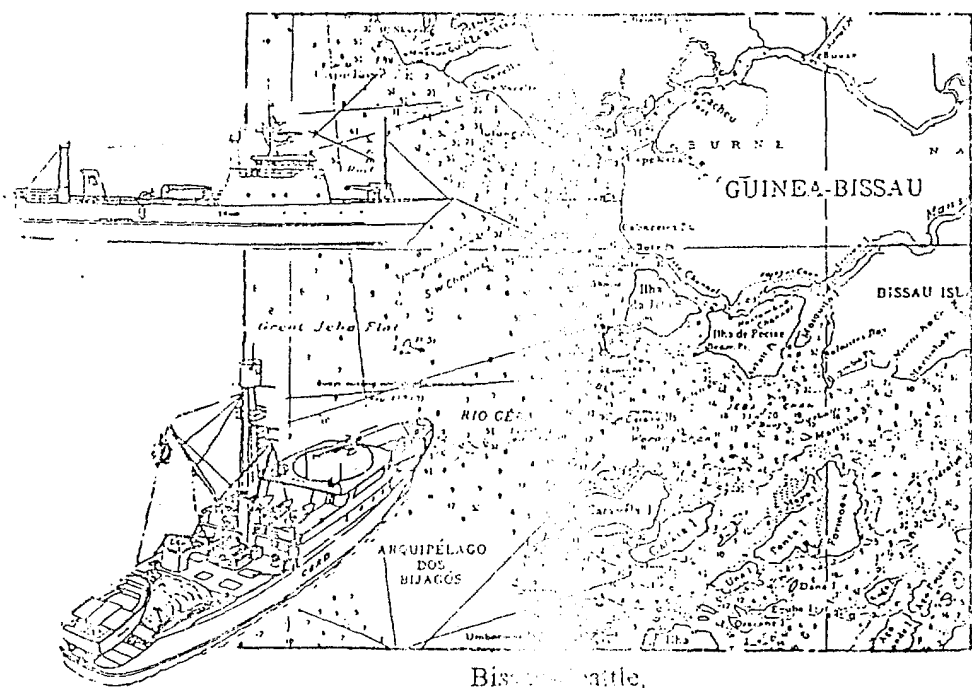
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NEW GUIDELINES FOR THE NATIONAL FISHERY POLICY

Part I

Assessment and recommendations
for the foreign fishery policy
of the Republic of Guinea-Bissau



Bissau, Bissau, October 12, 1994

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Mr. Eduardo Fernandes, Minister of Fisheries at the time of the preparation of this study, has always made himself available for interviews and discussions about many aspects of the development of the sector, giving his opinion, making comments and suggestions of great scientific and practical value. The conversations and exchange of opinions with Mr. Suleimane Djassi, director of the Office of Studies and Planning and Project coordinator on behalf of the Ministry of Fisheries, were always very productive and, thanks to his help, much of the data and information necessary for the preparation of the documents for this Project. The contributions made by the Workgroup comprised by Mr. António Morais dos Santos, Paul F. Turpin, Cirilo Vieira, Manuel Kassimo e Suleimane Djassi were extensively used in this study as a starting point for many recommendations to the government. It would also be very difficult to make suggestions about changes and reforms in the fishery sector in Guinea-Bissau without having received information and many suggestions from Mr. Mário Duro Fernandes, Vasco Metacarmo, João Gomes Lima, Paul Turpin and António Ferrage de Brito - who represent the private fishery sector in Guinea-Bissau.

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Finally, the author wishes to thank the honorable Ambassador John Blacken, national coordinator of TIPS-Bissau, his assistant for Economic Affairs, Mr. Josué Gomes de Almeida and everyone at the Project for their assistance, cooperation and orientation that have helped the author improve his research, speed up the gathering of information process and finish his work with minimum difficulty.

Again, thanking everyone for their assistance, the author wishes to take the responsibility for all the deficiencies of this study.

INTRODUCTION

The proposals presented in these NEW GUIDELINES FOR THE NATIONAL FISHERY POLICY FOR GUINEA-BISSAU are the result of a study commissioned by the Trade and Investment Promotion Support, funded by USAID-Bissau. The preliminary document was discussed and enriched with contributions and suggestions from several fishery technicians from the private sector and from government agencies, and experts from diversified sectors of the national economy. Hopefully, the final product of that exchange of ideas will be transformed into an Action Plan to guide the carrying out of those proposals.

The elaboration of the preliminary document and the accompanying Action Plan were based on the recommendations that came out of the I Conference of Fisheries in Guinea-Bissau, on August 11-13, 1993, the results of consultations with the honorable Minister of Fisheries and industry personnel, members of cooperating agencies as well as the conclusions of the two Meetings of the Fisheries Workgroup, on July 10 and August 11, 1994. The objective of these consultations was to prepare the initial analyses, to discuss the summary of recommendations and to hear the necessary comments and suggestions for the preparation of the final document.

The objective of the Action Plan is to translate the recommendations of the new policy for fisheries into a preliminary project. They will define the objectives, actions to be taken, necessary human, financial and other resources, timing of the execution of each project and other basic information that will be used to enable a clear definition of the concrete measures to be taken. Included in it will be the cost of the proposed reforms.

The Policy Recommendations and the Action Plan will be submitted for the perusal of the authorities of the sector and the representatives of the private sector, who will make corrections and changes, and then present it the Minister of Fisheries, who will give the final approval. Once approved, the authorities will be engaged in the application of the recommendations made in the plan.

The presentation of the final proposal and the Action Plan could be made during a round table organized by the government in early 1995 with the participation of the country's authorities, private sector and foreign governments' representatives, PNUD, ASDI, FAO, African Development Bank, World Bank, EEC, CCCE, USAID and other donating organizations.

The function of this document is to highlight some of the options that might be considered within the context of a strategy of this nature and, therefore, its objective is to contribute with Guinea-Bissau's process of definition of a new national policy for the fishery sector. This study focuses on the institutional issues and on the national marine policy.

EXECUTIVE SUMMARY

The fishery resources of the Republic of Guinea-Bissau are undergoing a continuous state of decline, caused by the uncontrolled activities of the foreign fleets. Without a radical reform of the country's national policy regarding the challenges created by the fishing activities in the country's Exclusive Economic Zone (EEZ), it will not be possible to reconstruct its resources and create a favorable environment to develop the country's capacity to sustainably use and protect its only national resource. In order to be effective, the reform must be focused only on the key problems and the intervention of the Ministry of Fisheries must be followed by the actions recommended in the Action Plan and be supported by the public sector and, in particular, by the private sector. The starting point could be the adoption of new management principles and the promotion of the private fishery sector. A new system for the management and protection (inspection) of the resources and the complete privatization of the fishery sector are considered the most urgent tasks.

It is highly recommended that the fishery relations be redesigned, first with the key countries or group of countries whose presence in the Exclusive Economic Zone has caused a considerable impact in Guinea-Bissau's economy and in the resulting state of the living marine resources. One effective way to accomplish this task would be to renegotiate the fishing cooperation agreements and to apply new criteria of distribution of its resources and for the estimate of the values of fishing licenses.

Considering the limited human resources in the fishery sector, it is proposed the efforts be concentrated in the agreements with the EEC and the cooperation with the People's Republic of China. A deep study of these countries' behavior indicates that there are many irregularities in their actions, such as the use without compensation for excessive tonnage of shrimpers, payment of licenses for some inefficient projects executed by the Chinese, exploration of tuna in the territorial waters of the RGB without, practically, any payment for the licenses to Guinea-Bissau and, what is even more serious, a irresponsible and unlimited fishing of all species caused by the GRT criteria for the sale of licenses.

In spite of the continuous decline of the revenue in foreign currency and the dangerous decline of commercial stocks, there is a possibility to renew the fishery resources and maintain the level of revenue in foreign currency by applying new methods of sale of licenses (to sell the right to fish a limited volume of the resources), establishing an official admissible fishing level (TAC) and controlling the fishing endeavors according to the resources available each year. Guinea-Bissau's Living Marine Resources Management Plan will be a concrete way to execute all proposed changes.

The preparation of the Plan is an urgent task. It requires extensive cooperation from the personnel at the Ministry of Fisheries and the active participation of multiple governmental institutions, Non Governmental Organizations and the country's fishery private sector.

1. OVERVIEW

1. 1. *Guinea-Bissau's marine environment*

Guinea-Bissau's Exclusive Economic Zone stretches for about 70,000 sq. km, approximately twice the country's land surface. Its Continental shelf is the longest of all Western African nations (see Map 1) and is made up by three distinct fishing grounds:

a) A zone that is less than 10 meters deep. It is accessible to pirogues or other artisanal boats,

b) A zone that is approximately 28,000 sq. km, less than 20 meters deep. It is in this area that the most significant part of the foreign fleets operates,

c) A zone that is approximately 15,000 sq. km. that stretches as far as 120 miles from the coastline. The sea floor in this zone is very irregular with depths ranging from 20 to 200 meters. It is the habitat of many species of fishes, shellfish (cephalopodes) and crustaceans.

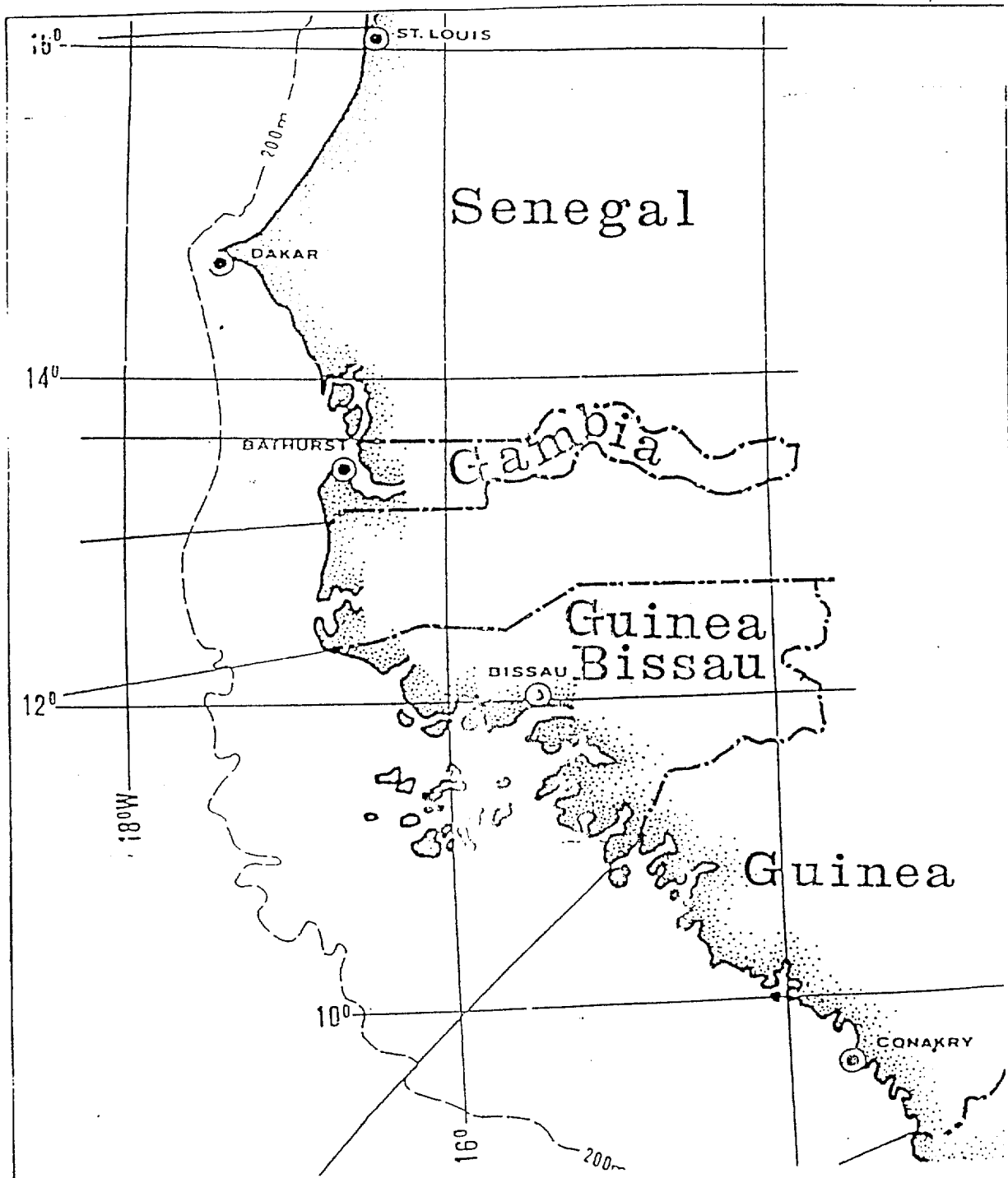
One nearly constant characteristic of Guinea-Bissau's coastal waters is their high primary production due to, amid other reasons:

a) the seasonal existence of a frontal zone that exists because of a seasonal alternation between the cold and hypersalinous currents moving from the Canary Islands and the warm, tropical currents.

b) a coastal upwelling that takes place on the continental shelf from December to March/April. It is accompanied by a flux of nutritive salts in the whole zone situated North of the Archipelago of Bijagos.

The above mentioned factors, in combination with the extension and characteristic of the continental shelf and coastline, -interrupted by numerous islands (including the Archipelago of Bijagos)- and the estuary of rivers, contribute to enrich the great abundance of biodiversity of marine life in Guinea-Bissau's Exclusive Economic Zone.

Map 1
Guinea-Bissau and neighboring countries
Continental Shelf



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1.2. *The state and potentiality of the Exclusive Economic Zone living marine resources*

Several previous studies about the continental shelf, though not in-depth studies, lead to consider that the total biomass of fish, shellfish and crustaceans could reach up to 1.5 million tons. This conclusion confirms the fact that Guinea Bissau's Exclusive Economic Zone is one of the most abundant fishing grounds in the Western African coast. Thus, it is estimated that the permissible catch yield level would be situated between 250,000 and 300,000 tons per year. The potential outcome includes a species of little commercial value but that is very abundant in the region. The total catch yield per year of Balistidae species (triggerfish) is estimated around 150,000 tons. Table 1 summarizes the estimates of admissible capture of resources in the Exclusive Economic Zone and its average value in the international market (numbers do not include Balistidae). This assessment of the living marine resources of Guinea-Bissau's Exclusive Economic Zone is based on the potential catch yield calculations prepared six to eight years ago. At that time, these resources were in a much better state than they currently are. The prices used on Table 1 refer to current tendencies in the fishery industry international market.

Overfishing, lax control and illegal fishing activities in the country's Exclusive Economic Zone have caused the reduction of the catch yield potentials and the worsening of the economic effects on the fishing industry. If the country's Government does not act soon, there is actual danger that the level and biodiversity of the commercial stocks will be drastically reduced. The first sign of a burst in the ecological balance of Guinea-Bissau's coastal waters is the enormous increase in the Balistidae population - a species with little commercial value. It takes over the gap in the habitat created by the overfishing of demersal and semi pelagic fishes. The decimation of these resources accounts for a persistent lowering of the revenues generated by the sale of fishing licenses to foreign vessels. Consequently, there is a negative effect for the national budget, fishery opportunities and the development of the national industrial fleet.

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Table 1

ANNUAL YIELD POTENTIAL AND MARKET VALUE OF THE LIVING MARINE RESOURCES
OF GUINEA-BISSAU

(Volumes according to estimates in the late 80's. Current Prices.)

SPECIES	ADMISSIBLE HALF FOB	HALF FOB	
Pelagic:			
a) Anchovies and Sardinellas	21000	300	6.000.000
b) Caranguidae	20000	200	4000000
Demersal	100000	800	80000000
Shrimp	5000	6000	30000000
Lobster	500	5000	2500000
Crabs	500	5000	1500000
Cephalopodes	2000	3000	6000000
Other species	1000	1000	1000000
TOTAL	150000		131300000

NOTE: The volume of Balistidae species (150,000 t/year) is not included due to its low commercial value.

Source: Djassi, S., *Pescas: Importância, Dificuldades e Perspectivas de Desenvolvimento*. Bissau, 10 de agosto de 1993.
MacAllister, Elliott & Partners. *Relatório sobre o Setor de Pescas*. Bissau, Junho, 1989.
Estudo Sobre a Avaliação do Primeiro Plano Quadrienal com Vista à Preparação do Segundo Plano de 1988 a 1997. Bissau, Outubro de 1987, Secretaria de Estado das Pescas.

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**FOREIGN CURRENCY REVENUE GENERATED BY THE SALE OF FISHING
LICENSES
TO FOREIGN FLEETS BETWEEN 1983-1993**

	NUMBER OF		REVENUE US\$		SOURCE
	Vessels	Licenses			
1983		220	1900000	2.5	McAlister/Elliot&Partners (MEP), 1989
1984		171	2800000	5.5	MEP
1985		224	3200000	12.3	MEP
1986			4500000	23.2	SEP, Quadrennial Plan, October, 1987
1987		142	7000000	29.5	SEP
1988		258	4600000	27.1	MEP, 1989
1989	157	231	6340000	23	MEP and Statistics Dept., 1994
1990	208	315	22860000	30	World Bank, AF4IE, 1993
1991	213	323	13490000	40	World Bank, Report P-5902-GUB,1993
1992	162	242	14930000	41	Djassi S., TIPS Report, 1994
1993	120	141	10500000	45.7	Min.Finan., 1994 Budget.
1994	108	169	11300000	43.7	Min. Finan. 1994 Budget.

- NOTES
- 1) Shaded areas are considered provisional data.
 - 2) 1994 Budget forecast by the Ministry of Finances.

There is great need to start taking advantage of the market policies (such as the promotion of privatization and expansion of the country's industrial fishery capacities) properly formulated, in

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Considering the alarming state of the country's living marine resources, the following yield potentials were presented by EEC (Memorandum on the New Fishery Agreement Protocol Guinea-Bissau/EEC, May 1993) to negotiate the future Fishery Cooperation Agreement 1995/97:

Table 2
POTENTIAL YEARLY CATCH YIELDS IN THE EEZ OF THE RGB
ACCORDING TO EEC PROJECTIONS, 1993.

Species	Tons
Shrimp	2,400
Demersal Species	
Sole/Flounder	2,000
Salmont	1,000
"Machados"	4,000
Corvina	10,000
Barbel	12,000
Grouper	5,600
Red Porgy, Dentex and "Bicas"	6,000
"Colo-colo"	30,000
Subtotal	70,800
Diverse	5,000
TOTAL	78,000

Source: RGB/EEC Fishery Agreements, Memorandum on the New Protocol, EEC, Brussels, May 1993.

2. IMPORTANCE OF THE FISHERY RESOURCES FOR THE COUNTRY'S ECONOMY

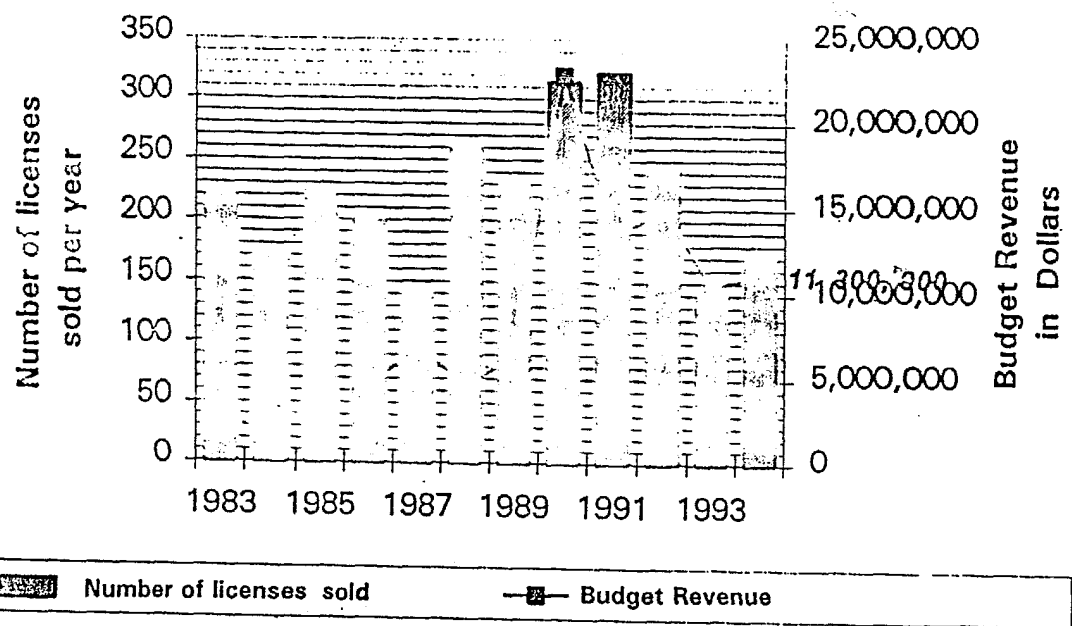
2.1. *Marine resources as a source of foreign currency*

The fishery industry is the most important sector in Guinea-Bissau's economy. In 1993 it contributed with about 46% of the country's total foreign currency revenue, generated by two sources: a) the sale of fishing licenses to foreign fleets to operate on the coast and, b) the export of fish by local companies and joint ventures. The revenue in foreign currency generated by the sale of licenses was US\$ 14,930,000 in 1992 and US\$ 10,500,000 in 1993. For 1994, the Government expects that revenues will increase to the level of US\$ 11.8 million, or 12%. Fishery exports generated approximately US\$ 3 million in foreign currency each year. Table 3 and Figure 1 indicate that between 1983 and 1993 the dependency of the sale of fishing licenses for the National Budget has grown eighteen times.

The study that covers five years (1989-1993) shows a clear, progressive increase of the country's dependency on foreign fleets as the most important source of revenue. Such dependency has created an undesirable situation in which the Ministry of Finances has begun to consider and plan the revenue from the fishing licenses as a certain, integral part of the National Budget. Due to the existing, ongoing destruction of the commercially significant fishery resources in the EEZ, the pressures from the Public Treasure on the fishery sector to bring forth the prefixed levels of foreign currency revenues make the situation even more alarming and dangerous for the sustainability of this important national asset.

TABLE 3

REVENUE IN FOREIGN CURRENCY GENERATED BY THE SALE OF FISHING LICENSES, 1983-1993

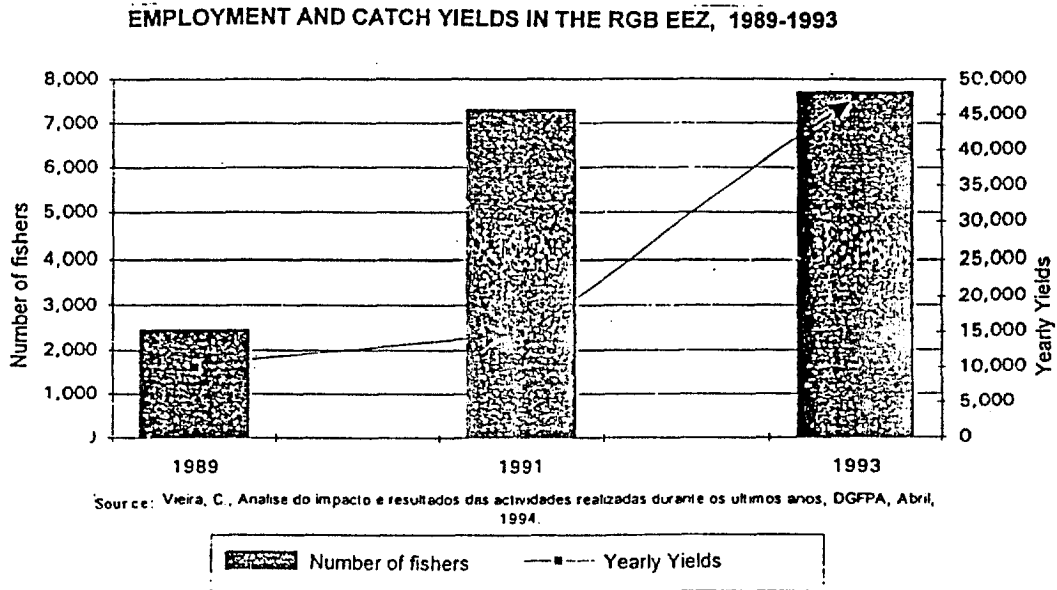


2.2 The fishery sector and employment

The living marine resources are an important source of employment for artisanal fishers and of animal protein for the domestic consumer market. According to the data collected in 1991 in the artisanal fishing census, there are approximately 1,800 pirogues. About 350 of them are equipped with outboard motors and the remaining are propelled by oar or sail. More than 3,100 fishers and 4,300 helpers work in them. It is estimated that 10,000 jobs are created by the post-catch processing activities. One important facet of these tasks is that they are performed by women who are particularly active in the commercialization of the fish ("bideiras"). (Plano Director da Pesca Artesanal, Draft, Direção Geral do Fomento da Pesca Artesanal, Bissau, March, 1994).

The graphics in Figure 2 were prepared according to the data presented by Veira, C. (in *Análise do Impacto e Resultados das Atividades Realizadas Durante os Últimos Cinco Anos*, Direção Geral do Fomento da Pesca Artesanal, April, 1994). It displays an increase in the number of local fishers. The catches by the artisanal fishing sector in the 12-mile coastal zone have increased rapidly during the last five years, from 10,000 tons in 1989 to 47,500 tons in 1993. A significant part of these yields is illegally exported to neighboring countries.

Figure 2



Considering that the post-catch activities (treatment, transport, and distribution of the fishing products) generate about three jobs per each fisher, there could be considered that a total of 21,000 jobs are created by these activities.

2.3. *The role of seafood in the family diet*

Seafood plays a fundamental role in the Guinea-Bissau family diet, making up to 20% of the total consumption of food in the country. Seafood protein is the greater part of animal protein consumed by fishers, in rural communities, and by the urban population. In areas where it is readily available (Bissau), seafood is consumed by about 70% of the population in comparison with 50% in areas where supplies are not as often available.

Data published by FAO (Bonzon, A., Horemans, B., Socioeconomic Data Base on African Fisheries, FAO, Rome, 1990) indicates that seafood consumption, represented as a percentage of animal protein consumed in the RGB, is 12% and that the consumption per person is 2,8 Kg. Compared to seafood consumption in other Western African countries, RGB's population consumes the lowest quantity of seafood (Table 3).

It is one of the fundamental objectives of the Government of Guinea-Bissau (GGB) to increase the production of seafood directed at the domestic market, as a means to guarantee supply for the country's population and to create an atmosphere for the development of the country's capacity to process its marine resources (speech by Minister Eduardo Fernandes, *Algumas reflexões sobre o sector das pescas na RGB*, during the opening of the I Conference on the Fishery sector in the Republic of Guinea-Bissau, August, 1993).

Table 4

**Seafood consumption in Guinea-Bissau
and in Western African countries**

	Percentage of seafood in the total consumption of animal protein	Consumption of Kg/person (1986)
Senegal	37.5	28.1
Cape Verde	43.7	23.9
Gambia	40.0	19.8
Sierra Lema	66.7	16.4
Guinea-Conakry	33.3	6.1
<i>Guinea-Bissau</i>	<i>12.5</i>	<i>2.9</i>

Source: Bonzon, A., Horemans, B., Socioeconomic Data Base on African Fisheries,
FAO, Rome, 1990

3. INTERNATIONAL RELATIONS OF THE RGB REGARDING FISHERY

3.1. *Growing pressure of foreign fleets in the Exclusive Economic Zone.*

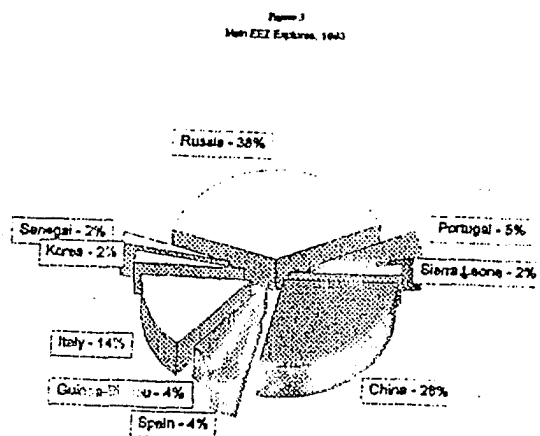
Because the country cannot exploit its resources situated beyond the 12 miles from the coastline, the only way to profit from this potential is through the sale of fishing licenses to foreign vessel owners.

When licensed fishing started in 1978, the waters of Guinea-Bissau were dominated by the industrial Russian fleet, which fished great quantities of the country's living marine resources. According to official data from the USSR's fishing mission, from 1981 to 1990 the fishing endeavors by the Soviet fleet caught nearly 130,000 tons per year. However, technical calculations lead to conclude that the yields must have reached, in fact, over 200,000 tons per year. At that time, the revenue in foreign currency through the sale of licenses to the Soviet Union did not exceed US\$ 2.5 million per year.

Later, the Government of Guinea-Bissau also started cooperation programs with European, Asian and other countries. The cooperation agreements were signed with the EEC, the People's Republic of China, Senegal, among other. The RGB also signed joint ventures with France, Portugal, Algeria, Germany, and the Soviet Union. With the disintegration of the Soviet Union in 1991, the pressures on the marine resources of the country were substantially reduced. The void was rapidly occupied by the Asian fleets (China, Korea and, lately, Japan) and European (EEC).

Currently, the Russian, Chinese, European Community's, South Korean, Japanese and African (Morocco, Senegal, Ghana and Guinea-Conacky) fleets explore the stocks of shrimp, cephalopodes, fishes and crustaceans in the 200 miles of the EEZ, as defined by the bilateral and multilateral fishing agreements. Presently, the GGB has agreements signed with the EEC, and representatives from China, Japan and Senegal. These commitments made by the GGB create a very strong cumulative pressure in the exploration of the country's marine resources.

The data presented on Table 5, Figures 3 and 4 summarize the volume of the yields and the participation of several foreign fleets in EEZ of RGB in 1993 .



The Portuguese, Spanish, Italian, French, and Greek fleets operate as part of - and are heavily subsidized by - the EEC, which covers a significant share of the license costs. If, for instance, the cost of a shrimp license is US\$ 750.00 for a shrimper GRT the vessel owner pays only US\$ 266.00 (only 35%) while the remainder US\$ 484.00 (65%) is paid through compensation, transferred by the EEC to the Government of Guinea-Bissau each year. The convenience of such an agreement is the fact that the compensation (the subsidized portion of

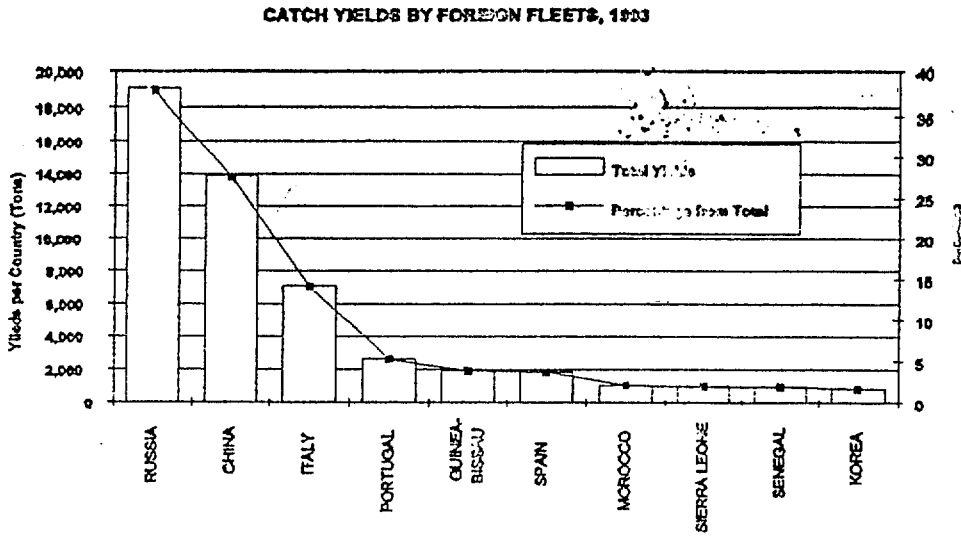
the EEC-member fleet) is paid regularly, in one-year intervals. Furthermore, it also offers the RGB other advantages (such as the stability in budget revenues, simplification of negotiations, centralization of control in the relations with the EEC-member nations, among others).

Table 5
CATCH YIELDS BY FOREIGN AND GB FLEETS IN 1993

	Country	Yields (Tons)	% from Total
1	RUSSIA	19090	38
2	CHINA	13.873	28
3	ITALY	7094	14
4	PORTUGAL	2640	5
5	G. BISSAU	1924	4
6	SPAIN	1862	4
7	MOROCCO	1065	2
8	SIERRA LEONE	1004	2
9	SENEGAL	969	2
10	KOREA	849	2
	TOTAL	50370	100

Source: Department of Statistics, Ministry of Fisheries, 1994

Figure 4



25
1

3.2. *Destructive characteristics of the uncontrolled fishing in the EEZ.*

Taking advantage of the country's insufficient scientific information, its limited capacity to negotiate ideal conditions of exploration of its marine resources by foreign fleets, of an ineffective national system of management of its resources and its limited ability to supervise the EEZ, the RGB partners in international cooperation agreements have been able to negotiate favorable conditions to themselves which have contributed, in time, to cause the overfishing of the commercially important stocks. Unfortunately, the foreign vessel operators are more interested in obtaining maximum profit and high return of their investment, and show little interest in the conservation of the natural fishery resources and in the expansion of the country's ability to protect its resources (there are many verbal and written accounts on this subject). There is, in fact, intense competition among themselves to extract the maximum quantity of resources in the least length of time. In spite of their long presence in the region and the great advantages that they have taken so far, they are obviously careless with the sustainability of the resources they explore and the negative consequences their operation causes.

Historically, the Soviet fleets were the first to operate under the conditions of the cooperation agreements. Their methods were damaging under all aspects. They operated using an enormous fleet (1985 - 90,000 GRT), fishing ecologically damaging volumes of resources (213,000 tons) and compensating the CGB with a US\$ 2,500,000 symbolic payment).

A similar method of exploration of the resources in the EEZ can now be observed. There is extensive illegal fishing inside and outside the 12-mile zone with no semi-control of the activities of the foreign fleets. The worthless, accidental catches are not reported and, due to the fact that the vessels operate based on the vessel's GRT (Gross Registered Tonnage)

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instead of the admissible catch limit (quota), vessel operators try to maximize their yields, without taking on account the condition of the stocks that are being explored.

3.3. Reduction in the volume of yields and the impact on Guinea-Bissau

The net result of such a practice is that the GGB misses an opportunity to increase its revenues, since the excessive fishing endeavors lead to a consistent reduction of the catch yields. In its turn, that causes the reduction of the number of fishing vessels and, consequently, of the number of licenses sold by the Ministry of Fisheries. Between 1990 and 1993 the volume of yields were reduced from 115,000 to 45,000 tons - or, 2.5 times, as shown on Table 6 . Recently, the foreign fleets' GRT has also undergone a reduction from 172,000 tons (1990) to 63,600 tons (1993) or 2.7 times.

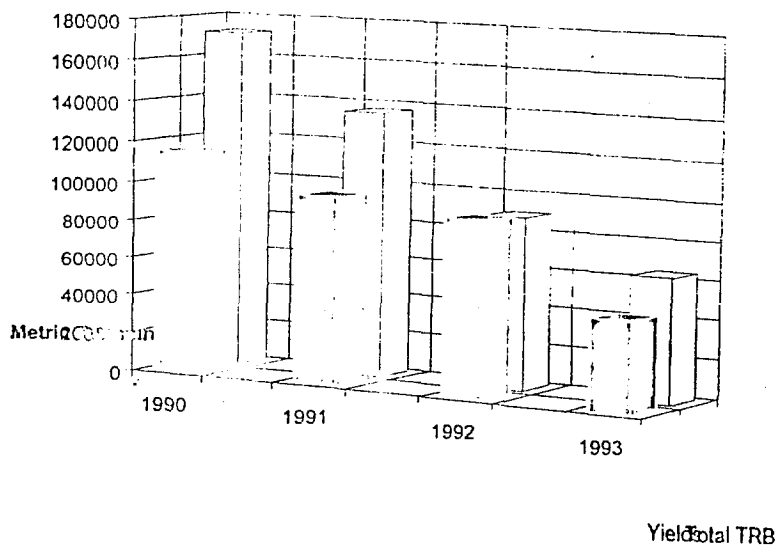
Due to the absence of a policy for the sale of the fishing rights according to a plan for the management and the conservation of the RGB's resources, the phenomena of the continual reduction in the number of fishing operations and the volume of yields (number of vessels and corresponding GRT - as shown on Figure 5) can be considered as a direct result of overfishing in the EEZ. The stocks that do not offer acceptable levels of profit to the foreign vessel owners are increasingly less attractive to them, causing, consequently, a reduction in revenues for the National Budget.

Table 6

EVOLUCAO DE CAPTURAS POR GRUPOS DE ESPECIES E TAB ANUAL DAS FROTAS ESTRANGEIRAS DURANTE 1989 - 1993										
GRUPO DE ESPECIES	1989		1990		1991		1992		1993	
	Captura	TAB	Captura	TAB	Captura	TAB	Captura	TAB	Captura	TAB
Peixe	14.538	98.552	113.170	82.210	69.267	74.713	34.467	34.467	14.257	
Crustaceos	59.522	4.687	40.872	4.512	52.817	3.297	50.848	4.437	40.918	
Cefalopodos	1.480	14.532	17.712	11.010	14.409	3.166	4.861	6.801	8.453	
TOTAL:	75.540	115.771	172.054	97.732	136.493	81.176	89.674	45.705	63.628	
Fontes:	Gabinete de Estudos e Estatística Departamento de Estatísticas, Direccção da Pesca Industrial, Ministério dos Recursos Bissau, Agosto, 1991									

Figure 5

EVOLUTION OF YIELDS AND ANNUAL GRT BY FOREIGN FLEETS DURING 1990 - 1993



Source: Table 6

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NOTE ON THE QUALITY OF STATISTICAL INFORMATION:

In spite of the recent progress on the statistical information on fisheries gathered by the Ministry of Fisheries, the data presented in this study was not only difficult to obtain but, when found, it was also often incomplete. The information about the volume of catch yields is not uniform and its quality is poor due to, on one hand, the insufficient training of the personnel who gathered it (the main source of information of the fishing activities in the EEZ) and, on the other hand, the fact that they are employed as crewmembers by the foreign operators, in spite of their role as representatives of the Government of Guinea-Bissau. Furthermore, there is no efficient cooperation among the several departments of the Ministry of Fisheries to exchange data and information about industrial fishery. It is particularly urgent that the cooperation between the Department of Statistics and the Department of Industrial Fisheries be improved. The crisis of fishery statistics in the sector runs even deeper because of the outdated data processing programs and the electronic equipment used by the Department of Statistics. They are, in a way, obsolete and, consequently, have little professional and scientific value. The printers and computers are old, and have small data processing capability. There are not sufficient diskettes, plotters, tapes, paper and other office supplies. The statisticians employed by the Department need to be retrained as early as possible in order to be able to process the scientific data and to translate them into a language of fishery policy and of conservation of Guinea-Bissau's marine resources.

3.4. *Bioeconomic Effects of the Overfishing in the EEZ*

Along with the continuous decrease in the volume of the catch yields, caused by a reduction of the commercial stocks in the EEZ of the RGB, it is also noticeable that there has been a decrease in the daily catch yields of all groups of species explored by foreign fleets. As the perspective for the catch yields of shrimp, cephalopodes or fish, is reduced, the price for these resources lower in detriment of the economic efficiency of fishing in the RGB's EEZ. The catch yields of increasingly smaller specimens suggest that the industrial fleets are exploring younger stocks, not yet suitable for economic exploration.

Table 7

**DAILY CATCH YIELDS PER VESSEL
MAIN TARGET-SPECIES, 1990 - 1993**
(Daily amounts in kilos)

Group of species	1990	1991	1992	1993
SHRIMP	368	294	214	268
DEMERSAL	1,241	1,009	1,235	1,172
PELAGIC	4,787	5,664	2,095	1,172
CEPHALOPODES	873	646	186	255
OTHER SPECIES	770	372	255	140

Source: Department of Statistics, Ministry of Fisheries, 1994

Captura diaria em quilogramos

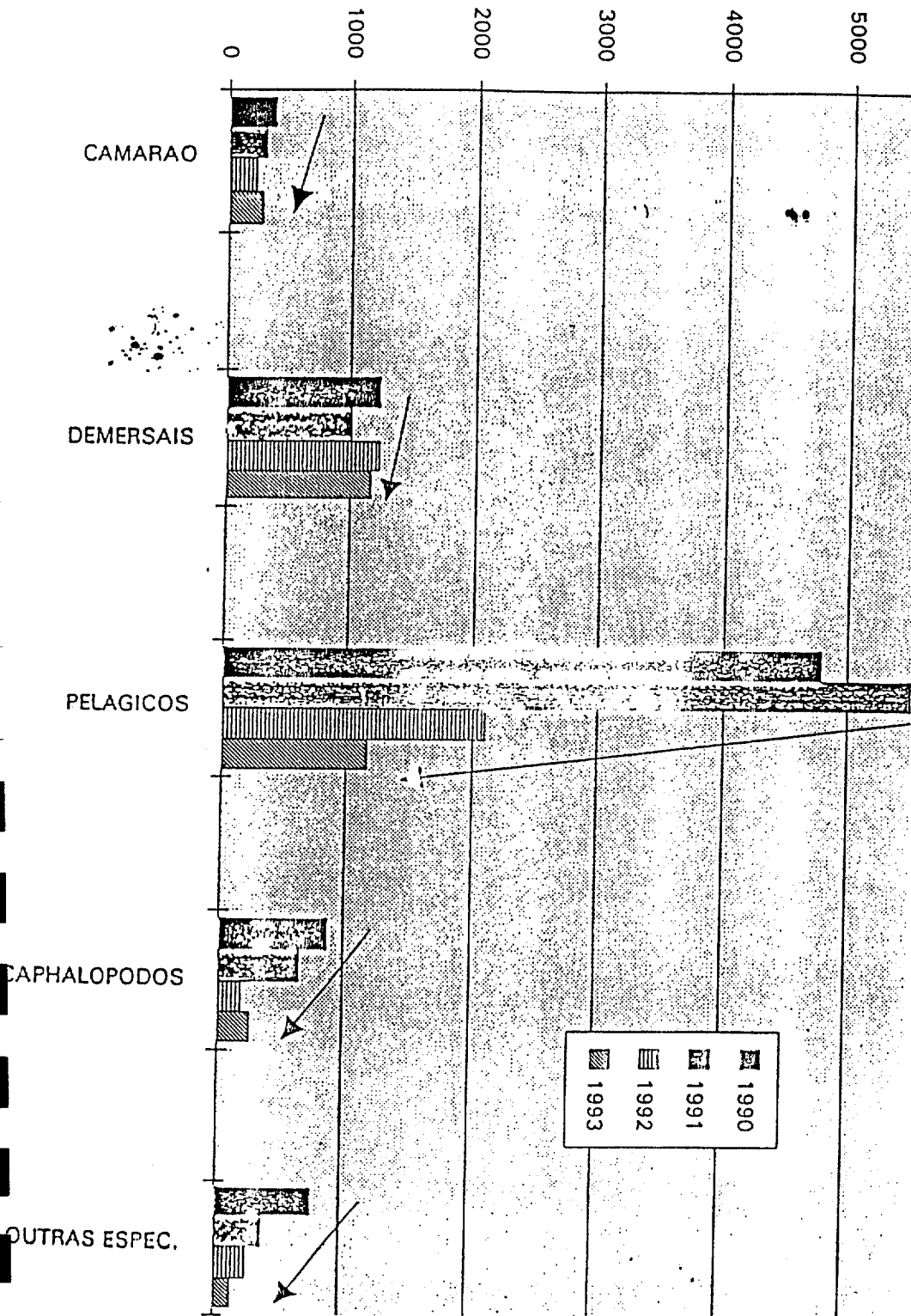


Figura 6. EVOLUCAO DE CAPTURA POR DIA DE PESCA, 1990 - 1993

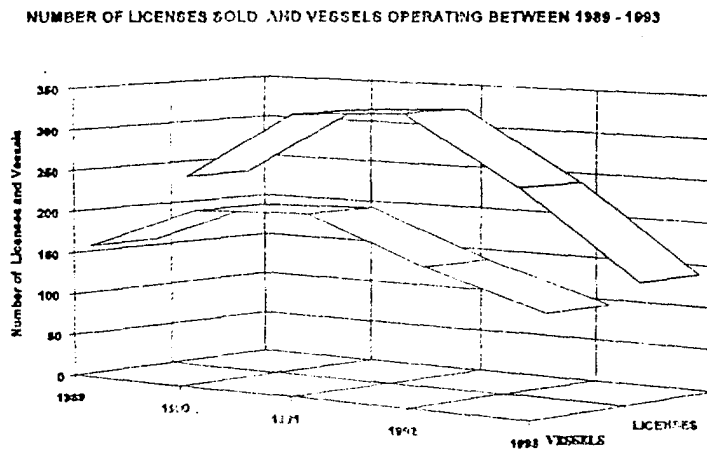
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3.5. Reduction of the GRT and decrease of the number of vessels with licenses bought between 1990 and 1993

A drastic decrease of the total GRT of vessels controlled by foreign owners interested in operating in the EEZ of the RGB. This trend is accompanied by the reduction of licensed vessels. Figure 7 indicates that the total of foreign vessels operating in the EEZ was twice as less in 1993 than in 1990.

Figure 7



A reduction in the number of vessels and licenses sold is alarming, since it may reflect two adverse trends:

a) A decrease in the budget revenue. Table 2 shows a clear view of this tendency. The Ministry of Finances forecasted a cut of 24% of the total revenue in foreign currency 24% for 1994 when compared to 1992.

b) The number of licenses decreases more rapidly than the number of vessels authorized to fish in the EEZ of the RGB. That means that now there are fewer vessel operators who buy two licenses (for two separate fishing seasons). The vessel operators who currently buy licenses operate for longer periods to compensate their costs (and licenses) due to the inferior quality of the resources.

4. ASSESSMENT OF GUINEA-BISSAU'S INTERNATIONAL FISHERY COOPERATION POLICY

4.1. Analysis of the contractual relations with foreign governments:

The cases of the EEC and the People's Republic of China

The assessment of the national fishery policy in relation to foreign interests is based on the analysis of the conditions of cooperation agreements between the RGB and its foreign partners, through the legal instruments of fishery cooperation with the EEC and the People's Republic of China. The Cooperation Agreement RGB/EEC regulates all the fishing activities in the EEZ of at

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least five European nations (Portugal, Spain, Italy, France and Greece). The financial compensations from the EEC contribute with about 50% of the country's total revenue in foreign currency.

The cooperation agreements (Verbal Processes) with the People's Republic of China have great socioeconomic importance to the country since the Chinese develop several projects of cooperation and supply the RGB's domestic market with a significant quantity of seafood. The review of the agreements and protocol statements of international cooperation signed by the Ministry of Fisheries during the last 3 years (Agreement with the EEC and Verbal Process and Agreement of Technical Assistance with the People's Republic of China, Agreement with Senegal, and the Protocol of Fishing License with Japan) leads to conclude that the country applies different criteria to license access of the EEZ resources to its foreign partners.

An initial impression of this analysis shows that most of the agreements the GGB has signed with foreign nations can be significantly improved. This could generate more revenue with a smaller number of licenses (or, in this case, resources) sold to foreign operators and a more efficient protection of RIB's interests.

The second conclusion is that the Government of the RGB does not employ a uniform policy and impose similar conditions to grant access to its EEZ to all its foreign partners. As an example, the conditions of the fishery agreement with the EEC-member nations are very different from the conditions of the agreement with the Peoples's Republic of China, although their objective is the same: the exploration of the marine resources in the EEZ.

One of the conclusions is that the country's representatives who will take part in future

negotiations for new cooperation agreements could probably obtain the best results and benefits for the country if they are well prepared for the negotiations from the scientific, professional and international points of view. The agreements with the EEC and China suggest that these foreign partners use their experience and economic background to obtain benefits to their advantage.

A brief study of the most recent agreements with the EEC and with China leads to those conclusions.

4.2. *The EEC: a two-faced partner*

An example of the "consuming" behavior (in other words, to explore the maximum volume of resources without any preoccupation with the mid or long term socioeconomic and ecological consequences to Guinea-Bissau) are the fishery cooperation agreements between the EEC and the RGB:

1) The GRT criteria and the benefits to the EEC

The EEC prefers the vessel Gross Registered Tonnage (GRT) criteria to determine the intensity of the fishing endeavors to guarantee an unlimited volume of catch yields. This is a clearly destructive method for the control of the fishing activities and the sustainability of the marine resources. The GRT criterion has been described, simply, as one of the most dangerous ways to award licenses to foreign fleets in the EEZ of the RGB. There is widely spread knowledge that there is no correlation between the GRT and the catch capacity of a fishing vessel. This fact does not refrain the negotiators of the Department DG14 of the EEC (the Department of Fisheries of the EEC in Brussels responsible for negotiating and executing the

Agreement with the RGB) from asking for the maintenance of this method, alleging its use because of its simplicity and ease of execution. The Tables 8, 9, 10 and 11, prepared with information from both the EEC and the Ministry of the Fisheries of the RGB prove that the use of the GRT criteria without a catch yield limit allows the foreign partner to secure greater economic and financial benefits for itself than for the country that owns the marine resources. Based on the Memorandum on the New Protocol of Fishery Cooperation (May 1993) it is noticeable that the EEC provides practically no information about the activities of their fleets in the EEZ of the RGB. By comparing our Table 8, the information of the Department of Statistics of the Ministry of Fisheries, with the data of the Memorandum above-mentioned it is possible to note a gross underestimation by the EEC of the yields caught by the Italian fleets in 1992. For example, an operation of 44 shrimpers in 1992, according to the EEC, caught only 315 tons, in other words 7 tons by vessel/year, which is considered an extremely low volume. Tables 8, 9, 10 and 11 can properly aid in the preparation of the Management Plan for the Resources of the EEZ and in the improvement of the methods and criteria of distribution of the resources by different operators.

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**CATCH YIELDS AND FISHING ENDEAVORS OF EEC SHRIMPERS
COMPARATIVE DATA FROM 1992 AND 1993**

	SPAIN	ITALY		PORTUGAL	TOTAL or average
	1992	1992	1993	1992	
Number of vessels	59	44	23	27	129
GRT	16,073	14,376	7,333	7,881	38,330
Vessels' average GRT	272	327	319	292	297
Days of fishing for the entire fleet	6,797	7,048	6,670	4,391	18,236
TGT/months of fishing for entire fleet	227	235	222	146	608
Days of fishing per vessel	115	160	290	163	146
Yields per day of dia de pesca (kilogr.)	237	115	146	552	312
Yields (in kilograms) per 1 GRT/year	100	56	133	308	180
Yields TOTAL (kilograms)	1,610,000	811,000	976,000	2,426,000	5,012,000
Annual Yields per vessel (kilograms)	27,288	18,432	42,435	89,852	159,575

NOTE: The shrimp catch yields on the EEC Report are presented in two sheets, each showing a different level of annual yields. The MF data does not match the EEC information for the same year.

Quadro 9. COMPOSICAO, VOLUMENS E VALORES DE CAPTURA						
DA FROTA ESPANHOLA DURANTE 1993						
Nome/Guineense	Nome/cientifico	Dias/pesca	TOTAL (kg)	por grupo de especies (toneladas)	Valor unitario US\$/tonel.	VALOR TOTAL DE MERCADO US\$
CAMARAO						
Camarão	Penaeus spp.	220	101,746			
Camarão-tigre	Penaeus monodon	9	768			
Gamba	Parpenaeus longirostris	349	817,281			
				922	6,000	5,530,767
CEFALOPODES						
Choco	Sepia Spp.	228	405,632			
Lula	Loligo Spp.	16	30,611			
Polvo	Octopus vulgaris	213	121,695			
				302	2,000	1,208,870
CRUSTACEOS						
Lagosta	Palinurus mauritanicus	37	3,900			
Caranguejo	Calappa rubroguttata	163	19,456			
CaranguejoBoca		8	482			
CaranguejoPeito		1	60	24	2,000	47,796
PEIXES DEMERSAIS						
Abrotea	Gadella maraldi	45	30,096			
Bagre	Arius heudeloti	10	874			
Corvina	Argyrosomus regius	22	2,103			
Dentao	Dentex angolensis	19	7,180			
Garoupa	Cephalopholis nigri	22	1,008			
Limar	Microchirus boscanion	130	105,738			
Linguado(SOLEA)	Dicologlossa cuneata	224	68,313			
Moreia	Muraena helena	6	455			

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Peixe-espada	Trichurus Lepturus	3	180			
Rainha	Pteroscion pell	38	21,253			
Tamboril (Rape)	Lophius piscatorius	86	1,740			
Salmonete	Pseudupeneus prayensis	112	6,400			
Sinapa	Dentex macrophthalmus	10	700			
				254	800	203,233
PEIXES PELAGICOS						
Cor-cor	Pomadasy jubelini	11	1,488			
Lichia	Lichia amia	7	448			
Tubarão	Sphyrna lewini	52	2,238			
Listado	Katsuwonus pelamis	96	22,138			
				26	350	9,209
DIVERSOS						
		173	74,294	74	400	29,600
TOTAL:						
		2,310	1,862,279	1,862		6,944,483
Fonte: Departamento de Estatísticas, Ministerio das Pescas, Agosto, 1994						
File: Spain93.wk1						

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Quadro COMPOSICAO, VOLUMENS E VALORES DE CAPTURA						
DA FROTA ITALIANA DURANTE 1993						
Nome/Guineense	Nome/cientifico	Dias/pesca	TOTAL (kg)	CAPTURA		VALOR TOTAL DE MERCADO US\$
				por grupo de especies (tonelad.)	VALOR unitario US\$/tonel.	
CAMARAO						
Camarão	Penaeus spp.	365	949,073			
Camarao-tigre	Penaeus monodon	21	3,186			
Gamba	Parpenaeus longirostris	207	24,082			
Lagosta	Palinurus mauritanicus	165	25,526			
Caranguejo	Calappa rubroguttata	74	7,359			
CaranguejoBoca		3	43			
CaranguejoPeito		0	90			
		835	1,009,359	1,009	6,000	6,056,154
CEFALOPODES						
Choco	Seppia Spp.	365	2,825,840			
Polvo	Octopus vulgaris	363	442,050			
		728	3,267,890	3,268	2,000	6,535,780
PEIXES DEMERSAIS						
Abrotea	Gadella maraldi	114	5,270			
Alabote	Hippoglossus hippoglossu	155	7,961			
Bagre	Arius heudeloti	14	300			
Barbinho	Galeoides decadactylus	2	34			
Barbo	Polydactylus quadrifilis	12	960			
Bica	Lutjanus spp.	19	4,802			
Carapau	Decapterus rhonchus	123	20,720			
Cherne	Polyprion americanus	22	1,500			
Corvina	Argyrosomus regius	36	2,503			
Dentao	Dentex angolensis	62	3,890			

Garoupa	Cephalopholis nigri	187	18,922			
Limar	Microphirus Boscanion	365	681,053			
Linguado(SOLEA)	Dicologlossa cuneata	365	1,072,913			
Moreia	Muraena helena	25	3,650			
Raia	Raja spp	10	661			
Rainha	Pteroscion peli	12	210			
Salmonete	Pseudupeneus prayensis	279	87,991			
Sinapa	Dentex macrophthalmus	207	24,311			
		2,009	1,937,651	1,938	800	1,550,121
PEIXES PELAGICOS						
Bicuda	Sphyraena spp.	51	34,607			
Cor-cor	Pomadasys jubelini	127	28,164			
Machado	Drepane africana	43	4,363			
Peixe-prata	Eucinostomus melanopterus	3	650			
Rebenta-conta	Elops Lacerta	21	1,849			
Sardinella	Sardillena spp.	12	238			
Sareia	Caranx senegallus	23	4,266			
Tubarão	Sphyrna lewini	61	3,059			
Atum	Thunnus thynnus	16	461			
		357	77,657	78	350	27,180
DIVERSOS						
		365	801,165	801	500	400,583
TOTAL:		4,294	7,093,722	7,094		14,569,817
Fonte:	Departamento de Statisticas, Ministerio das Pescas, Agosto 1994					
File: Italy93.wk1						

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Garoupa	<i>Cephalopholis nigri</i>	187	18,922			
Limar	<i>Microchirus Boscanion</i>	365	681,053			
Linguado(SOLEA)	<i>Dicologlossa cuneata</i>	365	1,072,913			
Moreia	<i>Muraena helena</i>	25	3,650			
Raia	<i>Raja spp</i>	10	661			
Rainha	<i>Pteroscion peli</i>	12	210			
Salmonete	<i>Pseudopeneus prayensis</i>	279	87,991			
Sinapa	<i>Dentex macrophthalmus</i>	207	24,311			
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Machado	<i>Drepane africana</i>	43	4,363			
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Rebenta-conta	<i>Elops Lacerta</i>	21	1,849			
Sardinella	<i>Sardillena spp.</i>	12	238			
Sarela	<i>Caranx senegallus</i>	23	4,266			
Tubarão	<i>Sphyrna lewini</i>	61	3,059			
Atum	<i>Thunnus thynus</i>	16	461			
		357	77,657	78	350	27,180
DIVERSOS		365	801,165	801	500	400,583
TOTAL:		4,294	7,093,722	7,094		14,569,817
Fonte:	Departamento de Statisticas, Ministerio das Pescas, Agosto 1994					
File:	Italy93.wk1					

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Quadro II. COMPOSICAO, VOLUMENS E VALORES DE CAPTURA DA FROTA PORTUGUESA DURANTE 1993						
				CAPTURA		
		Dias	TOTAL (kg)	por grupo de especies (Toneladas)	Valor unitario \$\$/tonel	VALOR TOTAL DE MERCADO US\$
Nome/Guineense	Nome/cientifico	pesca				
CAVARAO						
Camarão	Penaeus spp.	354	1,848,427			
Gamba	Parpenaeus longirostris	145	81,407			
Caranguejo	Calappa rubroguttata	277	49,139			
		776	1978973	1,979	6000	11,873,838
CEFALOPODES						
Choco	Seppiã Spp.	332	140,676			
Lula	Loligo Spp.	8	255			
Polvo	Octopus vulgaris	136	8,418			
		476	149349	149	2000	298,698
PEIXES DEMERSAIS						
Abrotea	Gadella maraldi	50	2,968			
Alabote	Hippoglossus hippoglossus	58	2,699			
Bagre	Arius heudeloti	13	547			
Barbinho	Galeoides decadactylus	32	5,590			
Barbo	Polydactylus quadrifilis	25	4,004			
Carapau	Decapterus rhonchus	26	893			
Corvina	Argyrosomus regius	104	16,118			
Dentao	Dentex angolensis	35	2,952			
Garoupa	Cephalopholis nigr	263	42,104			
Juliana	Cynoponticus ferox	121	23,412			
Limar	Microchirus Boscanlon	137	16,753			
Linguado(SOLEA)	Dicologoglossa cuneata	339	176,137			
Peixe-espada	Trichurus Lepturus	75	9,964			
Raia	Raja spp	6	342			

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Rainha	<i>Pteroscion peli</i>	279	63,325			
Tamboril (Rape)	<i>Lophius piscatorius</i>	7	48			
Salmonete	<i>Pseudupeneus prayensis</i>	79	2,143			
Sinapa	<i>Dentex macrophthalmus</i>	10	1,694			
	Sub-total	1659	371693	372	800	297,354
PEIXES PELAGICOS						
Bacalhau	<i>Rachycentron canadum</i>	1	15			
Bicuda	<i>Sphyrna</i> spp.	1	15			
Cor-cor	<i>Pomadasys jubelini</i>	31	1,471			
Machado	<i>Drepane africana</i>	9	2,545			
Palometa	<i>Orcynopsis unicolor</i>	10	505			
Peixe-prata	<i>Eucinostomus melanopterus</i>	11	1,490			
Rebenta-conta	<i>Elops Lacerta</i>	12	425			
Sareia	<i>Caranx senegallus</i>	3	210			
Tainha	<i>Mugil</i> spp.	3	180			
Tubarão	<i>Sphyrna lewini</i>	15	394			
	Sub-total	96	7250	7	350	2,538
DIVERSOS						
		305	124,236	124	500	62,118
Farinha/peixe		11	8,827	2	400	3,531
		6330		2640		12,538,077
FONTE: Departamento de Estatística, Ministerio das Pescas, 1994						

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VOLUMES AND VALUES OF THE POTENTIAL YIELDS BY THE EEC VESSELS
WITH PAYMENT OF LICENSES AND ANNUAL FINANCIAL COMPENSATION
FOR A TWO-YEAR AGREEMENT

Group of species	GRT according to agreement & species	License Fees per GRT paid by the vessel owner US\$	Value of licenses valid for 150 days per TAB US\$	Potential Yields per year (tons)	Value per ton US\$	TOTAL VALUE OF THE YIELDS US\$	Payment of licenses by the vessels CEE(US\$)	Value of licenses as a % of the yields' values
SHRIMP	11,000	266	111	5,000	6,000	30,000,000	1,221,000	4
CEPHALOPODES	6,000	209	87	2,230	2,000	4,460,000	522,000	12
FISHES (Other species)	6,000	188	78	3,500	1,200	4,200,000	468,000	11
TUNA		Lic.por ton. of the tuna					Total fees paid by the CEE	
encirc. vessels	20 vessels	20	Year	1,500	1000	1,500,000	1,500	0.10
cana/palangr. vess	12 vessels	15	Year	180	1500	270,000	300	0.11
TOTAL:	23,000			12,410		40,430,000	2,212,800	5
							Financial compensation by EEC (subsidies of vessels)	6,000,000
							Total paym. for licenses by EEC/year	8,212,800
								20

Sources: Memorandum on the New Protocol of the Fishing Agreement RGB/EEC, May 1993

2) Future Agreements with the EEC

In spite of being well-informed of the exhaustion of the fishery resources in the EEZ of the RGB and the continuous reduction of the catch yields, the EEC continues insisting in secure the same yield volumes to its fleet (GRT) as four to six years ago, when the resources were abundant. On Table 12 there is a projection of the amount of the remuneration and the ratio of licenses that will be paid to the Government of the RGB, compared to the amount of the resources that will be captured by the fleets of the EEC during the two years of the Agreement for 1995/1997. The subsidies provided by the EEC to the vessels of its member-nations come to approximately US\$ 6,000,000 per year. The country may lose this revenue in the event the EEC decides to cut these subsidies. On the other hand, it is noticeable that the EEC pays the Government of the RGB only 4% of the value of the shrimp caught during a year. Considering all groups of target-species (including the tuna) the EEC pays the Government of the RGB only 5% of the amount of their catch yields. In such circumstances the annual Remuneration is a very uncertain source of revenue for the RGB National Budget since it can be cut any time.

3) Monitoring of the activities and data collection

No action was taken by the EEC to rectify the irregularities in the performance of the observers from Guinea-Bissau aboard the EEC's vessels. The observers, in detriment of the task of gathering of biological-statistic data about the catch yields and the fishing activities of the vessels of the member-nations of the EEC, are employed by the captains as crewmembers.

4) Insufficient furnishing of information

The EEC does not furnish any statistical information of scientific value about its fleets' activities in the EEZ of the RGB. The EEC Memorandum on the New Protocol of Fishery Agreement Between the RGB/EEC, May 1993, furnishes contradictory data in clear discrepancy with the information available at the Ministry of Fisheries (see Table). To get an idea about the market value of the species captured in the EEZ of the RGB, it is necessary to gather information about the disembarkations, operational costs and other data, which could serve as a foundation during future negotiations for fishery cooperation. Unfortunately, such data is not furnished to the RGB. A deeper analysis of the data about the activities of the EEC's shrimper fleet is summarized on Table 13. It shows that during 1992 the EEC used an excess of 4,322 GRT of the shrimpers over what had been signed in the Cooperation Agreements. Thus, the total amount of the remuneration that has not been paid to the Government of Guinea-Bissau is US\$ 4,193,375.

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COMPARATIVE ASSESSMENT OF EEC'S SHIMPER FLEET
(SPAIN, ITALY, PORTUGAL) DURING 1992/93
WITH PAYMENT OF FINANCIAL COMPENSATION TO THE RGB
ENDEAVORS(GRT)

	CONDITIONS OF AGREEMENT RGB/EEC	ACTUALLY USED BY EEC
GRT/month on annual average	11,000	1992 38,330
Number of vessels of 297 GRT each	37	129
Vessels/fishing days authorized to fleet	13,505	18,236
Average number of days authorized and effective per vessel/year	365	146

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Coefficient rate of average fishing days to calculate annual average gross GRT (146/365 days = 40%) 40

Number of	11,000	15,332
GRT/month. Annual average		

Difference of GRT/month on

annual average between Agr.RGB/EEC

and effective use by EEC 4,332

Value of licenses paid by

EEC vessel operators for the difference

US\$ 266 x 4,332 1,152,312
GRT)

Difference of financial annual

05

compensation to be paid to
GB

by Brussels in 1992

(US\$ 484 x 4.332 GRT)

2,096,688

Difference of non-paid

compensation in two years

4,193,376

5) License value Vs. catch yield value

The current practice for the payment of licenses by the EEC (and other nations including China and Japan) is clearly unfair to Guinea-Bissau. For example:

- a) During a one-year period, the license paid by the shrimpers corresponds to only 4% of the commercial value of the shrimp yields (Table 12),
- b) For the tuna, the licenses paid by the EEC (also by Japan) are insignificant. They are worth less than 1% of the value of the yields and have no relation with the tuna market value (Table 14). In 1993, the RGB collected US\$ 2,700 as revenue from the tuna fishing licenses to nine vessels. Simply put, this is an unacceptable amount.
- c) Considering the possible underestimation of the GRT used by the EEC and the catch yields for shrimp, there is great probability that there has been insufficient payment of licenses during the period 1994/96.

4.3. The effects of fishery cooperation with the People's Republic of China

4.3.1. Overview of the relations with the People's Republic of China

The political and economic relations with the People's Republic of China come from many years, and the fishery cooperation has allowed the Chinese to operate their fishing vessels (initially shrimpers) in the EEZ of the RGB since early 1980. The construction of, among other buildings, the stadium in Bissau, the Cantchungo Hospital and assistance in the public health sector, the supplying of four 25-meter patrol vessels and the construction of six small fishing wood vessels in Bissau are examples of the Chinese effort to secure their access to the fishery resources of the EEZ of the RGB.

In spite of its long tradition, the fishery cooperation with the People's Republic of China has not produced lasting socioeconomic results to Guinea-Bissau. One of the reasons for this is the fact that the cooperation has taken place on the Government-Government level and not on a Business-Business level. The second reason is the fact that an important part of the Chinese activities was being subsidized by Beijing. The third reason is the fact that the Chinese assistance was firmly linked to the objective of maximization of its fishing of RGB. The evidence of the Chinese strategy in relation to the RGB is the actual Protocol of Cooperation, in spite of the cancellation of diplomatic relations between China and the RGB.

According to various reports (for example the Report VIRKIR, from 1987) the design of the vessels was defective and their catch yields did not cover the operational costs. Unfortunately, these same vessels were used by the China/Guinea-Bissau Cooperation Project and produced financial loss and other operational difficulties.

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4.3.2. Inventory of the activities of the Cooperation Project between China and Guinea-Bissau

An inventory of the actual fishery cooperation between China and Guinea-Bissau is presented below:

1. Licensed Fishing in the EEZ

The People's Republic of China operates approximately 21 fishing nets on the Guinea-Bissau coast. Their tonnage is relatively small (199 GRT per vessel) mainly for the capture of shrimp (and accidental catch of fish). During 1993 the Chinese fleet captured 13,866 tons of varied species with a market value appraised at US\$ 14.732.606 (Table 15). The major part of these were demersal fish and cephalopodes. In order to obtain fishing licenses in the EEZ of the RGB during 1993 the Chinese vessels paid US\$ 1,212,935 (including US\$ 517,000 as the value of fish supplied to the domestic market). The information on Table 16 shows that the payments of the licenses in currency and in products correspond to 8.2% of the total value of the Chinese-caught yields in the EEZ of the RGB. According to the preliminary calculations for 1993 the Chinese Government owes the RGB US\$ 638,902 that were not paid for unknown reasons.

2. Supply of seafood to the domestic market

The Chinese would supply seafood to the RGB domestic market, as part of the payment for the fishing licenses. In 1993 the Chinese fleet delivered 1,034 tons of seafood sold by the Ministry of Fisheries. The preliminary calculations show that the price of a ton of seafood

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supplied by the Chinese is approximately US\$ 500.Cif Bissau. This would mean a total value of US\$ 517.000 (Table 16).

Since the average sale price of the seafood by the Ministry was approximately 5,500 PG/kg, in other words 5.5 million of PG/ton, the total, an accurate approximation of the sale value was 5,687,000,000PG. The private sector presented many complaints concerning the sale of the Chinese-caught seafood by the Ministry at prices below the market price, disturbing the performance of this sector.

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Quadro 15 COMPOSICAO, VOLUMENS E VALORES DE CAPTURA
DA FROTA DE CHINA POPULAR DURANTE 1993

GRUPO DE ESPECIES	Nome científico	TOTAL Kgs	TOTAL por grupo de especies (Toneladas)	Valor unitario US\$/tonel.	VALOR TOTAL DE MERCADO US\$
CAMARAO:					
Camarão	Penaeus spp.	144,111			
Camarão-tigre	Penaeus monodon	3,870			
Gamba	Parapenaeus longinostr.	950			
	Sub-total	148,931	149	6,000	893,586
CRUSTACEOS					
Lagosta	Palinurus mauritanicus	10,943			
Caranguejo	Calappa rubroguttata	139,922			
Caranguejo Boca		54,055			
Caranguejo Peito		6,126			
	Sub-total	211,046	211	6,000	1,266,276
CEFALOPODES					
Choco	Sepia Spp.	888,303			
Lula	Loligo Spp.	6,836			
Polvo	Octopus vulgaris	432,865			
	Sub-total	1,321,168	1321	2,000	2,642,336
PEIXES DEMERSAIS					
Abrotea	Gadella maraldi	144			
Alabote	Hippoglossus hippoglossus	456			
Baça	Arius heudeloti	1,187,085			
Barbinho	Galeoides decadactylus	671,739			
Barbo	Polydactylus quadrifilis	1,526,425			
Bica	Lutjanus spp.	2,890			
Carapau	Decapterus rhonchus	20,419			
Corvina	Argyrosomus regius	3,837,141			
Dentão	Dentex angolensis	2,967			
Djoto	Pseudolithus elongatus	8,840			
Garoupa	Cephalopholis nigri	50,774			
Juliana	Cynoponticus ferox	26,192			
Linar	Microchirus boscanlon	262,084			

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Moreia	Muraena helena	16,290			
Peixe-espada	Trichurus Lepturus	987,840			
Raia	Raja spp	7,870			
Rainha	Pteroscion peli	78,346			
Salmonete	Pseudupeneus prayensis	8,920			
Sinapa	Dentex macrophthalmus	9,285			
	Sub-total	8,705,597	8706	800	6,964,478
PEIXES DEMERSAIS					
Linguado(SOLEA)	Dicologlossa cuneata	1,843,747	1844	1,200	2,212,496
ATUM					
Atum	Thunnus thynnus	11,536			
Espadarte	Xiphias gladius	2,750			
Listado	Katsuwonus pelamis	3,114			
Cavala	Scomber japonicus	9,535			
Cachurreta	Scomberomorus tritor	3,469			
	Sub-total	30,404	30	2,000	60,808
PEIXES PELAGICOS					
Bicuda	Sphyrnaena spp.	19,797			
Cabra	Trigla spp.	2,320			
Cor-cor	Pomadasya jubelini	511,804			
Djafel	Ethmalosa fimbriata	9,340			
Machado	Drepane africana	129,143			
Pombinha	Trachinotus spp.	1,610			
Peixe-agulha	Belone belone	70			
Peixe-prata	Eucinostomus melanopterus	11,898			
Rebenta-conta	Elops Lacerta	3,600			
Sardinella	Sardillena spp.	126			
Sareia	Caranx senegallus	90			
Tainha	Mugil spp.	1,176			
Tubarão	Sphyrna lewini	41,928			
	Sub-total	732,902	733	350	255,516
DIVERSOS					
		872,220	872	500	436,110
	TOTAL:		13,056		14,732,606

Fonte:

Departamento de Estatísticas, Ministério da Pesca, 994

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Quadro 6 ACTIVIDADES DA FROTA DE CHINA POPULAR NA ZEE DA RGB												
BALANÇO DE PAGAMENTOS E PEIXE FORNECIDO POR LICENCAS												
DE PESCA DURANTE 1993												
					GRUPO DE	Valor de		Tarifa	VALOR de	Valor de		
VALIDADE DE LICENCA					ESPECIES	licencas		oficial	licencas	licencas		
Nome de navio	TAB	Inicio	Termino	Dias pesca	ALVO	pagadas (US\$)	SS/1TA pagado	US\$/1TAB pro rata	regular US\$	nao pagadas (US\$)		
1	Yue Yuan Yu 2	199	01/01/93	12/31/93	364	Camarao	57,000	286	750	149,250	92,250	
2	Jing Yu 803	135	01/01/93	12/31/93	364	Camarao	40,500	300	750	101,250	60,750	
3	Jing Yu 804	135	01/01/93	12/31/93	364	Camarao	40,500	300	750	101,250	60,750	
4	Quindao 801	125	01/01/93	12/31/93	364	Camarao	37,500	300	750	93,750	56,250	
5	Quindao 802	125	01/01/93	12/31/93	364	Camarao	37,500	300	750	93,750	56,250	
6	Zhong Shui 9201	196	01/01/93	06/30/93	180	Camarao	30,282	155	371	72,692	42,410	
7	Zhong Shui 9202	196	01/01/93	06/30/93	180	Camarao	30,282	155	371	72,692	42,410	
8	Zhong Shui 9203	196	01/01/93	06/30/93	180	Camarao	30,282	155	371	72,692	42,410	
9	Zhong Shui 9204	196	01/01/93	06/30/93	180	Camarao	30,282	155	371	72,692	42,410	
10	Yan Yu 620	199	04/29/93	07/28/93	90	cefalopod	31,343	158	158	31,442	100	
11	Yan Yu 622	199	01/01/93	12/31/93	364	Peixe	31,840	160	530	105,470	73,630	
12	Yan Yu 617	199	01/01/93	12/31/93	364	Peixe	31,840	160	530	105,470	73,630	
13	Yan Yu 618	199	01/01/93	12/31/93	364	Peixe	31,840	160	530	105,470	73,630	
14	Yan Yu 621	199	01/01/93	12/31/93	364	Peixe	31,840	160	530	105,470	73,630	
15	Yan Yu 625	199	01/01/93	12/31/93	364	Peixe	31,840	160	530	105,470	73,630	
16	Yan Yu 626	199	01/01/93	12/31/93	364	Peixe	31,840	160	530	105,470	73,630	
17	Yan Yu 627	199	01/01/93	12/31/93	364	Peixe	31,840	160	530	105,470	73,630	
18	Yan Yu 628	199	01/01/93	12/31/93	364	Peixe	31,840	160	530	105,470	73,630	
19	Yuan Yu 2	199	01/22/93	03/22/93	59	Peixe	11,492	58	86	17,095	5,603	
20	Yan Yu 620	199	01/22/93	03/22/93	59	Peixe	11,492	58	86	17,095	5,603	
21	Yan Yu 619	199	01/22/93	03/22/93	59	Peixe	11,492	58	86	17,095	5,603	
22	Yuan Yu 1	199	01/22/93	03/22/93	59	Peixe	11,492	58	86	17,095	5,603	
23	Yan Yu 619	199	04/29/93	07/28/93	90	Peixe	9,925	50	131	26,078	16,153	
24	Yan Yu 1	199	04/29/93	07/28/93	90	Peixe	9,925	50	131	26,078	16,153	
25	Yan Yu 620	199	04/29/93	07/28/93	90	Peixe	9,925	50	131	26,078	16,153	
TOTAL:							695,935					
Fornecimento de 1.034 toneladas de peixe @ US\$ 500/tonelada							517,000					
T O T A L:						4,687		6,048		1,212,935	1,851,836	1,155,902
Fonte: Departmaento de Estatisticas, Ministerio das Pescas, 1994												
File: Lichin93.wkl												

Saldo a favor da RGB 638,902

3. China/Guinea-Bissau Cooperation Project

This Project was created as a result of the Contract China/Guinea-Bissau for Technical Assistance of December 4, 1987.

The Project acts, in fact, as a joint venture, in spite of its official name, and employs six wood vessels built ten years ago. They operate in pairs because their engine horsepower is very reduced. Considering the low productivity of these vessels, the Project brought on two medium-size freezer-trawlers to increase the catch yields. According to the preliminary information, these two industrial vessels operate inside the 12-mile zone, which is strictly reserved to artisanal fishing. Under the Project, resources are fished and then sold to the domestic market. Due to its statute as an experimental activity, the Project does not pay neither taxes nor other type of revenue contribution charged to other fishery enterprises in the country. There is enough preoccupation regarding these activities since they are not under the same competition rules and driving principles of the sector private.

4. Fishing joint venture between China/Guinea-Bissau

The Chinese acknowledge the difficulties with the rentability of the Project and suggest the establishment of a fishing joint venture, under the terms and conditions to be agreed upon. The partners of this joint venture will be the state-owned companies of the People's Republic of China represented by the National Corporation for Marine Fishing of the People's Republic of China (CONAPEMAC) headquartered in Las Palmas and by the Ministry of Fisheries of the RGB. Under these circumstances the new joint venture would

have the by-laws of a state-owned company as did the fishing joint venture earlier established with the participation of the Government of the RGB, such as "Estrela do Mar," Semapesca, Guialp and others.

5. The acquisition of two industrial fishing vessels by the Ministry of Fisheries

The Ministry of Fisheries has agreed with the purchase of two fishing vessels made in China, valued at a total of US\$ 1,900,000. To pay for this loan, the Government of the RGB has agreed to reduce the price of fishing licenses to 21 Chinese vessels operating in the EEZ.

6. Construction of a cold-storage complex and apartments for the Chinese personnel

The Chinese technicians will build a new cold-storage installation in Bissau. Simultaneously, there will be built apartments for the Chinese personnel employed in this project. The total cost will be US\$ 1,350,000 to be compensated by the Government of the RGB through the sale of licenses at reduced prices to 21 Chinese vessels.

7. Construction of housing for 13 Ministry of Fisheries employees

The Chinese technicians will also build housing for 13 Ministry of Fisheries employees. The total value of this project is US\$ 800,000. As in the above cases, the Government of the RGB will also make up for this cost through the reduction of the prices of fishing licenses.

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8. Chinese credit for the purchase of 10,000 tons of rice

The Chinese party insists that the remuneration for the credit they granted in October 1991, for the purchase of 10,000 tons of rice be settled through the sale of fishing licenses at a reduced price. The amount of credit for the importation of this product is approximately US\$ 4,000,000 - (in 1992, the average price for the ton of rice was US\$ 400). The Chinese vessels paid approximately half the value for the shrimp, cephalopodes and demersal fish licenses.

4.3.3. *Economic Impacts to the RGB*

The economic analysis about the fishing activities by the Chinese fleet in the EEZ of Guinea-Bissau and future cooperation between the two nations was formulated considering the yields caught by the Chinese during 1993, the payments in cash and seafood supplied to the RGB domestic market in exchange for fishing licenses during 1993 and by the evaluation of the future program of cooperation concerning the fisheries.

The conclusions of this analysis are as follows:

a) Table 15 indicates that the Chinese caught about 14,000 tons of assorted seafood generating about US\$ 15 million. To obtain entitlement to those resources they should have paid US\$ 1,212,935 in licenses. However, only US\$ 695,935 were paid in currency and 1,034 tons of fish were supplied to the domestic market, estimated at US\$ 517,000. Table

16 shows a summary of these payments and suggests that for its activities during 1993, the Chinese Government owes the RGB a total of US\$ 638,902.

b) If all of the credit granted by the People's Republic of China is accepted by the Government of Guinea-Bissau, this could create an accumulated debt of US\$ 8,050,000 that will be paid in fishing licenses reduced at approximately 45%, which could cause the following consequences to the RGB (Table 17):

- * The period for the credit refund will be 12 years,
- * The Chinese will be able to use 21 fishing vessels during the year for a total period of 12 years,
- * During the 12 years the volume captured by the Chinese will reach the level of 168,000 tons estimated at approximately US\$ 180 million,
- * After the credit refund, the net earnings for the Chinese would be approximately US\$ 82 million,
- * The Government of Guinea-Bissau will receive US\$ 21 million
- * In the event the of Guinea-Bissau does not agree to exchange the credit for the rice in licenses, the total credit will be cut to 50%. Guinea-Bissau's obligations would be proportionately reduced.

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Considering the socioeconomic impacts of the fishery cooperation with China it is recommended that all the agreements and projects with this country be thoroughly reviewed with the following objectives:

- to promote the privatization of the fishery sector,
- to benefit from greater revenue from fishing licenses,
- to guarantee the conditions of free competition with the private sector
- to reduce or to eliminate the economic dependence to the Government of the People's Republic of China,
- To avoid the possibility of catches by the Chinese in exchange for reduced licenses during the next six or 12 years.
- to sign a Cooperation Agreement with China based on a uniform and equal criteria to all foreign nations.

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4.4. THE EFFECTS OF A MORE EFFICIENT MANAGEMENT OF THE FISHERY RELATIONS WITH FOREIGN NATIONS (Summary of Conclusions)

The analysis of the fishery relations with the EEC and with the People's Republic of China shown on **Table 18** demonstrates the possibility to increase or at least stabilize (in the event EEC subsidies are interrupted) the revenue for the fishery sector if the Government of Guinea-Bissau could renegotiate the cooperation agreements with those two groups of nations.

Presently, the amount Guinea-Bissau collects from the sale of fishing licenses is, on average, only 17% of the value of the catch yields. The procedures for sale of licenses for the fishing of the tuna have to be radically reviewed. It is unacceptable that the RGB collects only 0.5% of the market value of the tuna catch yield in its territorial waters. It is necessary to conduct a bioeconomic study of the fishing of tuna in Northwestern Africa to reconfirm the volumes and values of catch yields of varied species of tuna, whose price has had a recent upward tendency in the international market.

The Government could make an appeal to the EEC to provide better information on its fleets' fishing activities in the EEZ of the RGB and entreat a radical change of the behavior of the European fleets in the territorial waters of Guinea-Bissau, by adopting the Responsible Fishing Code prepared by the FAO. This Code can serve as a foundation for either an agreement or a separate protocol between the RGB and the EEC to govern the fishing activities in the EEZ of the RGB.

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The People's Republic of China has paid only 8% of the value for its yields. By applying a uniform proportion of, for example, 30% over the value of the yields, the Government could request an increase of 3.5 times the value of the fishing licenses for the Chinese fleet. The improvement of the fishery relations with China is a task to be accomplished without delay. So far, all national policies toward that country were developed under the protection of the state-owned sector (i.e., the Ministry of Fisheries) producing, instead of profit or economic efficiency, distortions in the domestic seafood market.

Nevertheless, any revenue growth deriving from the foreign fleets' activities in the EEZ is conditioned by the application of criteria for environmentally responsible exploration of the resources and by the application of the principle that each vessel is allowed to fish a fixed volume of target-species with a few accidental catches. The criteria and methods for their application will be established by a forthcoming Fishery Resources Management Plan for Guinea-Bissau.

TRANSLATION NOTES:

Table 1/PAGE 29

**TITLE: ECONOMIC-OPERATIONAL ANALYSES OF THE LEASING WITH
OPTION TO BUY OF TWO FISHING VESSELS WITH THE CREDIT
FOR DEVELOPMENT OF THE NATIONAL PRIVATE FLEET**

Prepado Por - Prepared by

a) VESSELS' TECHNICAL DATA

TAB - GRT

Comprimento - length

Calado - Load draught

Motor Propulsor - motor

Sistema de preservação - Conservation System

Capacidade de porão - Hold Capacity

Equipagem - Crew

CONGELADOR - FREEZER

REFRIGERADOR - REFRIGERATED TRAWLER

Toneladas - Tons

Pessoas - Crewmembers

VALOR APROXIMADO - ESTIMATED VALUE

b) OPERATIONAL DATA

Numero de viagens - Number of Trips

viagens - trips

Dias de Pesca - Fishing Days

Dias de Viagens - Length of Trip (Days)

Estadia no porto - Length at the docks (Days)

(incluindo 30 dias reparações) - including 30 days for repairs

Outros dias perdidos - Other days missed

Total de Dias - Total of days

c) Yields

Captura diária - Daily catch yields

Camarão - shrimp

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Cefalópodes - Cephalopodes
Peixe exportação - Fish for export
Peixe Mercado Local - Fish for the domestic market

D) Entradas (Exportação e venda no mercado local)

Preço Medio - Average Price
Valor Total Vendas Dois Barcos - Total Revenue from the Sale of Yields from Both Vessels

E) CUSTOS DE OPERAÇÃO

Combustível/Lubrificante - Fuel/Lubricants
Equipagens - Crew
Alimentação - Meals
Reparações/Manutenção - Repairs/Maintenance
Seguros - Insurance
Transporte dos Produtos Exportados - Transportation of the Exported Products
Viagens Equipagem - Crew Trips
Artes De Pesca - Fishing Gear
Materiais - Materials
Custos Portuários - Port Dues
Custos de Administração em Terra - Inland Administration Costs
Imprevistos - Unexpect Expenses
Custos de Gestão Da Companhia Estrangerira - Foreign Company Management Costs

F) TOTAL COSTS

Lucros Operacionais - Operational Profits
Entradas - Entries
Custos de operação - Operational Costs
Prestação - Installment
Total Custo - Total Cost
Total Lucro Neto - Total Net Profit

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INSTALLMENT PLAN FOR THE PURCHASE OF A FREEZER AND A REFRIGERATED
TRAWLER VESSELS AND INLAND EQUIPMENT

Valor Aproximado Dos Barcos Usados - Estimated Value of Second Hand Vessels

Soma Básica - Credit Amount

Taxa De Juro Ao Ano - Yearly Interest Rate

O Período De Pago- Period for Reimbursement

Mes - Month

Começo - Begining

Término - End

Pago Total - Total Pay

Juro - Interest Rate

Pago Básico - Basic Pay

Pago Mensal - Monthly Pay

FIGURE 3

O PLANO DE PAGAMENTO DO CREDITO PARA DOIS BARCOS PESQUEIROS

INSTALLMENT PLAN FOR THE TWO FISHING VESSELS

Meses - Months

Balanço Mensal - Monthly Balance

Juro Mensal - Monthly Interest Rate

Soma Básica Mensal - Basic Monthly Amount

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