

in Brunei Darussalam and Indonesia, but had slightly decreased in Malaysia and Thailand, and decreased in Singapore. There was no change in the selling price of fish and fishery products in Brunei Darussalam, Indonesia, and Malaysia, but there was a slight decrease in Thailand. The logistics/access of traders and consumers to markets was not affected in Brunei Darussalam, but had slightly decreased in Malaysia and decreased in Indonesia and Thailand. The liquidity and income of fish traders were not affected in Brunei Darussalam, Indonesia, and Malaysia.

• *International trade*

The logistics/access to international markets had decreased in Brunei Darussalam, Indonesia, Myanmar, and Thailand (Figure 111). Although the demand from the international market had increased in Brunei Darussalam and Thailand, it had not affected Indonesia, slightly decreased in Malaysia, and decreased in Myanmar. The types of exported processed fish and fishery products had slightly decreased in Brunei Darussalam and Malaysia, had not changed in Indonesia, and decreased in Thailand. The types of imported processed fish and fishery products had increased in Brunei Darussalam, no change in Indonesia and Thailand, and slightly increased in Malaysia. The traceability of exported/imported fish and fishery products remained stable in Brunei Darussalam and Indonesia, slightly decreased in Malaysia. The application of product certification schemes has not affected Brunei Darussalam and Indonesia but slightly decreased in Malaysia.

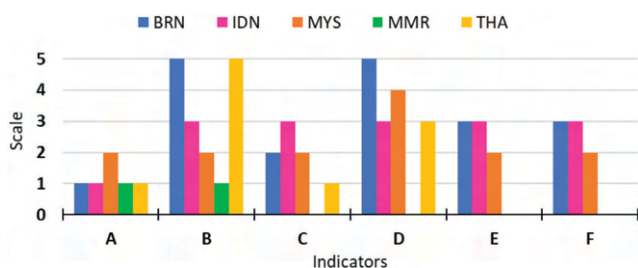


Figure 111. Impacts of COVID-19 on international fish trade of selected ASEAN Member States

(BRN- Brunei Darussalam, IDN-Indonesia, MYS-Malaysia, MMR-Myanmar, THA-Thailand. Scale: 0-Not applicable/no answer; 1-Decreased; 2-Slightly decreased; 3-Stable/no change; 4-Slightly increased; and 5-Increased. Indicators: A-Logistics/access to international markets; B-Demand from the international market; C-Types of exported processed fish and fishery products; D-Types of imported processed fish and fishery products; E-Traceability of exported/imported fish and fishery products; F-Application of product certification schemes)

Gender Roles

In Brunei Darussalam, there were no changes in gender roles before and during the COVID-19 pandemic. For small-scale fisheries, women went on helping their husbands in preparing the things needed for going to the sea as well as performing post-harvest processing; while the men, youth, and elderly continued in managing and operating their fishing boats. However, the elderly had reduced their frequency of engaging in fishing activities during the COVID-19. For commercial fisheries, the

men continued to manage and operate fishing vessels and maintain fishing nets.

In Myanmar, there was no change in the roles of women and men in capture fisheries including small-scale fisheries, commercial fisheries, and inland capture fisheries where the role of women in processing and selling fish was retained, while the role of men in fishing continued. For Thailand, the small-scale fishing activities were the same before and during COVID-19, but with more caution during COVID-19. Women sustained processing and selling fish and fishing, while men and youth continued fishing. The elderly still did the housework and looked after the children. For commercial fisheries, women continued to process fish and men continued fishing. For inland capture fishing activities, the fishing activities of men were intensified during the COVID-19.

Mitigation measures and support programs

The national mitigation measures and support programs of the government of the respective countries which were intended for the fisheries and aquaculture sector in response to the COVID-19 pandemic are summarized in Box 40.

Way Forward

Although efforts have been exerted to respond to the recovery and sustain the operations in the fisheries and aquaculture sector during the pandemic, the complex impacts of the COVID-19 pandemic on the fisheries and aquaculture sector in Southeast Asia has remained unpredictable and unstable. The accurate support should contribute straight away to the short- and long-term sustainability of this sector. Therefore, thorough cooperation among related stakeholders and organizations is the most important key for the management and implementation of the recovery and support schemes for the fisheries and aquaculture value chains.

8.4 Fisheries Subsidies

With the global decline of fishery resources, numerous international organizations are striving to lobby their global scenarios in conserving the resources and ending any activities that may jeopardize the resources' long-term viability. Subsidies to fisheries have become a major topic of discussion in the World Trade Organization (WTO), considering that a variety of problems have emerged from the financial support extended by governments to the fisheries sector, with the incentives that appear to encourage overfishing rather than to help in achieving sustainable fisheries. It has been estimated that the global fisheries subsidies could be between USD 14 billion and USD 54 billion each year. Subsidies to reduce the cost of fuel for fishing fleets are the most common, accounting for 22 % of the global subsidies (Sumaila *et al.*, 2019).

Box 40. Government mitigation measures and support programs for the fisheries and aquaculture sector in response to the COVID-19 pandemic
<p>Brunei Darussalam</p> <ul style="list-style-type: none"> • Top-up fund for aquaculture operators to bring in raw materials such as fish fry by chartered flight • Assistance for foreign workers on the application of entry permit
<p>Indonesia</p> <ul style="list-style-type: none"> • Assistance to fishers (e.g. provision of groceries and personal protective equipment, portable and mobile cold storage, ice-making machinery, and others) • Employment of thousands of workers who have lost their jobs due to COVID-19 through the Indonesia Coral Reef Garden (ICRG) 2020-2024: One of the National Economic Recovery Programs (PEN) and Mangrove Restoration Program (2020-2024)
<p>Malaysia</p> <ul style="list-style-type: none"> • Permitting all fishing and aquaculture activities, which were classified as essential services, during the enforcement of Movement Control Order (MCO) to ensure that food security is not compromised and the livelihoods of fishers and fish farmers are sustained • Dissemination of clear Standard Operating Procedures (SOP) and relevant guidelines through the Fisheries State Office, Fisheries District Office as well as social media to avoid miscommunication and ensure timely actions • Establishment of alternative marketing and distribution avenues such as controlled fresh markets in locations accessible to the public to allow fishers and fish farmers to sell their products and ensure that fresh products are accessible to the public at a fair price • Increment of the monthly cost of living allowances for small-scale fishers in marine and inland capture fisheries sub-sectors • Recovery plans to revive the fisheries and aquaculture sector by incorporating the sector in the short-, medium-, and long-term development plans
<p>Myanmar</p> <ul style="list-style-type: none"> • Allocation of USD 4.0 million for the distribution of fish seeds and fingerlings to fish farmers (July-September 2020) • Allocation of USD 40,514 to support the Safety at Sea Training for fish workers onboard fishing vessels (July-August 2020)
<p>Singapore</p> <ul style="list-style-type: none"> • Temporary Bridging Loan Programme for business owners to borrow up to about USD 3.7 million as working capital payable for five years (Apr 2020-Sept 2021) • Jobs Support Scheme as wage support for employers to retain local employees (Singapore citizens/permanent residents) during the period of economic uncertainty by co-funding a proportion of the first USD 3,400 gross monthly wages paid to each local employee up to March 2021 (Feb 2020-March 2021) • Foreign Worker Levy Rebate which was a waiver for monthly Foreign Worker Levy Fee by providing the businesses with USD 555 rebate for levies paid for each Work Permit/ Special Pass Holder (Apr-May 2020)
<p>Thailand</p> <ul style="list-style-type: none"> • Establishment of distribution channels through the Department of Fisheries for direct sale of prawn, white-leg shrimp, and Nile tilapia from fish farmers to consumers in 20 provinces where the selling prices were lower than the market prices • The Department of Fisheries issued the certificate for the operators who follow the measures to prevent COVID-19 contamination in fish and fishery products including aquaculture farms, fishing vessels, fish markets, quays, and central markets to build consumers' confidence in domestic and foreign markets • Establishment of the online market platform "Fisheries Shop" where fishers and fish farmers can sell their products online to avoid risky fresh markets and directly contact customers without dealing with middle persons • Strengthened the collaboration among stakeholders where factories inform fish farmers on the required amount of raw materials so that fish farmers could manage their production capacity and avoid oversupply (December 2020-April 2021)

WTO Negotiation on Fisheries Subsidies

The Doha Ministerial Conference in 2001 propelled the arrangements to clarify and move forward the WTO disciplines on fisheries subsidies, and during the Hong Kong Ministerial Conference in 2005, there was a broad agreement on fortifying those disciplines especially the appropriate and effective Special and Differential Treatment (S&DT) for developing and least-developed members which should be made indispensably part of the fisheries subsidies negotiations. In 2007, the Chair of Negotiating Group on Rules (NGRs) circulated the Draft Consolidated Chair Texts of the Anti-dumping and on Subsidies and Countervailing Measures (AD and SCM) which incorporated the disciplines on fisheries subsidies. Since then, several proposals relating to the Draft Consolidated Chair Texts had been submitted to the Chair. The development of the dialogue has prolonged the negotiations on the prohibition of positive styles of fisheries subsidies to be adopted in addition to the S&DT.

To conclude the negotiations, the Ministerial Conference (MC11) in 2017 decided on a workprogramme with the goal of adopting a fisheries subsidy agreement at the next Ministerial Conference, to help in fulfilling the Sustainable Development Goal (SDG) 14.6. Such SDG calls on the UN Members to eliminate subsidies that contribute to overcapacity and overfishing or IUU fishing practices – supposed to be completed by 2020. With these mandates, WTO members have expected to finalize the agreement including the S&DT for developing and least-developed countries and elected Ambassador Santiago Wills of Colombia to serve as chair of the negotiations since November 2019.

The cluster meeting of the Negotiating Group on Rules for Fisheries Subsidies Negotiations was resumed on 25 June 2020, where the draft consolidated text of disciplines was also presented. In September 2020, the WTO members began debating the consolidated draft agreement. The

members examined the draft text, especially those that focus on overcapacity and overfishing subsidies, subsidies to distant water fishing, S&DT for developing and least-developed countries, and transparency rules. Focus on specific areas of the text was particularly valuable, according to some members, because it helped generate some recommendations for compromise phrasing as well as better clarity on members' perspectives. Meetings of the cluster on fisheries subsidies were then convened from October to November 2020, before the finalization of the Agreement, which had been scheduled in December 2020.

In early 2021, negotiations using the draft consolidated text that was initially released in June 2020 continued and was still ongoing as of mid-2021, together with revised versions that were released in November and December 2020. In May 2021, the Chair presented a fresh draft text aimed at bringing the members closer to a consensus ahead of the virtual ministerial meeting on 15 July 2021. The significant changes in the revised draft text include tightening of the provisions for overfished stocks, focusing the task of the WTO on subsidies rather than on fisheries management, and eliminating language that could have had unintended consequences to the operation of international fisheries agreements; and transparency and notification obligations linked to the proposed flexibility entitlements, and the future formulation of S&DT as an exemption for subsidies granted by LDCs should be timebound.

During the virtual meeting of ministers and heads of delegations that took place on 15 July 2021, the Members agreed to finish the negotiations before the 12th Ministerial Conference (MC12) scheduled on 30 November to 3 December 2021 and gave the Geneva-based delegates the authority to do so. The Members also confirmed that the current negotiating text could be used as the basis for negotiations on the final agreement.

However, due to the lingering COVID-19 pandemic that forced many States to continue imposing travel restrictions, the General Council of WTO agreed on 26 November 2021 to postpone the MC12 although the new schedule had not yet been set as of the final preparations of this publication in December 2021.

Discussion on WTO Fisheries Subsidies at the Regional Level

The issue of subsidies in fisheries is one of the significant trade-related issues being addressed in the Japanese Trust Fund project “*Assistance of Capacity in the Region to Address International Fish-Trade Related Issues*” under the ASEAN-SEAFDEC Strategic Partnership mechanism. Importantly, the issue of subsidies in fisheries has been considered as a priority to be addressed under the Plan of Action (POA) on Sustainable Fisheries for Food Security

for the ASEAN Region Towards 2030 (SEAFDEC 2020a). The POA includes provisions on the need to “*assess the possible impacts of subsidies off fisheries, particularly on the special requirements and the needs of small-scale fisheries in the region*”; “*strengthen cooperation and mechanisms among AMSs to work towards common positions that could be reflected in international fish trade-related fora e.g. WTO...*”; and “*increase participation and involvement of AMSs in international fora and technical committees, e.g. WTO...*”

In the Southeast Asian region, the issue of fisheries subsidies was first raised in November 1999 at the SEAFDEC Preparatory Meeting on Issues of International Fish Trade and Environment. As a follow-up, the Regional Technical Consultation (RTC) on Fish Trade in the ASEAN Region was organized in Bangkok, Thailand on 9–11 April 2001. The findings of the RTC were then presented and discussed during the Technical Session of the “Millennium Conference” in Bangkok in June 2001. As a result, the Technical Report, which was produced as a result of the Technical Session, offered many recommendations that could be used as the basis for the formulation of policy considerations on fish trade by the ASEAN-SEAFDEC Member Countries. These recommendations include removing subsidies which are clearly shown to contribute to unsustainable fisheries practices; reviewing, in collaboration with international technical organizations such as FAO, the empirical effects of fishery subsidies on essential social and developmental issues; and developing a regional policy on fisheries subsidies, taking into consideration the regional specific requirements, and producing regional guidelines for fisheries subsidies.

Subsequently, the ASEAN and SEAFDEC organized the RTC on Fisheries Subsidies in 2003 and the Regional Meeting on Fish Trade and Environment in 2004. The meetings agreed that granting of subsidies should be accompanied by careful monitoring of their environmental and socioeconomic consequences and that any proposal opposing the granting of fisheries subsidies not backed up by enough scientific evidence and/or that undermines ongoing national resource management should be rejected. The meetings also emphasized the need for the ASEAN Member States (AMSs) to agree on a common position that the AMSs could use during international negotiations. It was noted, however, that there has been no systematic discussion on subsidies among the fisheries management authorities, and that fisheries management authorities from the AMSs were always underrepresented at the WTO meetings (Torell, 2003).

Consequently, the ASEAN-SEAFDEC Member Countries continue to discuss the regional positions from time to time through the ASEAN-SEAFDEC regional consultations, meetings of SEAFDEC Council, and the ASEAN Sectoral

Working Group on Fisheries (ASWGF). The regional common positions that had been established so far could be summarized as follows:

- Fisheries subsidies should be recognized as a tool used either as temporary or long-term measures under a broad national development and management framework to ensure the sustainability of fisheries
- Use of fisheries subsidies should be coupled with close monitoring and evaluation of the status of fishery resources as well as the impacts of subsidies on the socioeconomies and the resources, which differ from country to country
- Fisheries subsidies that contribute to sustainable fisheries, as well as people's livelihoods and poverty alleviation, should be permitted
- Some fisheries subsidies whether permitted or removed depending on a number of factors including management regime, the status of the resources, and the length of time that the subsidies are applied
- Fisheries subsidies contributing to over-exploitation of resources or unsustainable fisheries and trade distortion must be removed
- Close coordination between fisheries-related agencies and trade-related agencies in each country should be promoted to reflect the requirements and complexity of the fisheries

During the RTC on International Fisheries-related Issues convened by SEAFDEC in June 2018, it was pointed out that since a large portion of the catch in the region is multi-species, fisheries subsidies should therefore be considered by the types of fishing gear used and not by species. The RTC also recommended that the AMSs should consider the possibility of sending their respective country delegations that comprise their national fisheries officers, to take part in the different clusters of fisheries subsidies negotiations. Meanwhile, the RTC also suggested that SEAFDEC should consider facilitating the identification of a focal point from each AMS as well as the development of the ASEAN common position on fishery subsidies for adoption by the ASEAN Ministers on Agriculture and Forestry (AMAF), which should be reflected at the WTO fora.

In September 2020, SEAFDEC hosted the Webinar on "Fisheries Subsidies: Southeast Asian Region Perspective" to obtain updated information on the status of the negotiations from key relevant partners, e.g. SEAFDEC Member Countries, FAO, International Institute for Sustainable Development (IISD), WTO (SEAFDEC, 2021a). Attended by representatives from the ASEAN-SEAFDEC Member Countries, the Webinar identified the need for capacity building on stock assessment because the characteristics of Southeast Asian marine capture fisheries are complex and diversified, including the several species caught and gears used. Various stock assessment approaches have been tried in estimating the status of the

stocks of commercially exploited aquatic species. However, there were obstacles encountered in the process due to a lack of time-series data and human resources to develop an acceptable stock assessment model. In this regard, the Webinar also asked SEAFDEC to consider collaborating with FAO and relevant experts for the development of stock assessment capacity building programs to improve knowledge and identify the necessary reference points (e.g. overcapacity, overfishing) for a better understanding of the stocks status, as well as the development of an appropriate multi-species stock assessment model to be used by the SEAFDEC Member Countries. The results would be advantageous to the SEAFDEC Member Countries during the WTO negotiations on fisheries subsidies.

Subsequently, SEAFDEC also convened the Webinar on the WTO Fisheries Subsidies Draft Consolidated Text (Negotiating Group on Rules) on 10 and 17 June 2021 to share the views on the WTO Fisheries Subsidies Draft Consolidated Chair Text (WTO-FSCCT) and obtain the views of the ASEAN-SEAFDEC Member Countries on such text (SEAFDEC, 2021b). The experts offered their perspectives on the draft text, focusing on three pillars of disciplines: prohibition of subsidies for IUU fishing, prohibition of subsidies for overfished stocks, and prohibition of subsidies for overcapacity and overfishing. This Webinar expressed the concern on the need to strengthen cooperation to assist the developing countries in identifying IUU fishing and effectiveness of IUU subsidy disciplines, assessment of the level of stock depletion, and the SD&T provisions for developing and least-developed countries.

In summary, the potential impacts of the WTO provisions on the fisheries sector of the region are of high and utmost concern. The region's fisheries and aquaculture are multi-species, multi-gear, and small-scale, but the region's small-scale fisheries sub-sector has been significantly contributing to food security, even considering that the amount of catch is unaccounted or under-represented. Assessment of the utilization of the fishery resources at the species level is necessary under the WTO provisions. It is, therefore, crucial to improving the capacity of the overall sector not only the small-scale fisheries sub-sector, to quantify the reference points and prove that the catch is at a sustainable level. With these concerns, the proposed transition period for two years under the WTO provisions seems to be impractical since the countries require more time, human resources, national legislations among others, to adjust and implement the new obligations.

Way Forward

Fisheries subsidies are among the important trade-related concerns being continuously discussed by the ASEAN-SEAFDEC Member Countries. Several dialogues had been convened to address the issues on fisheries subsidies,

focusing on regional issues and requirements. The Member Countries are aware that contributing to unsustainable fishing practices should be avoided. However, more research is necessary to look into the scope and impacts of subsidies. In the continuing international negotiations on fisheries subsidies, capacity building on the stock assessment that suits the regional specificities and harmonized ASEAN position would be beneficial.

9. Socioeconomic Well-being in the Fisheries Sector

9.1 Labor in Fisheries and Fish Workers

Jobs in fisheries are associated with the entire value chain of fish and fishery products, starting from the production of the fish that includes fabrication of fishing gears; boat construction and maintenance; preparation of baits; catching the fish; and acquiring aquaculture seeds and feeds for fish culture as the case may be. At the end of the value chain is the consumption of the fish and fishery products that had undergone the processes of the utilization of raw materials by the fish processing industry, marketing, distribution, until the actual consumption by the public (FAO/ILO, 2013).

Fishing is recognized as among the most dangerous of all professions in the world. Recognizing the need to ensure that fishers have decent conditions of work onboard fishing vessels, the International Labour Organization (ILO) adopted in 2007 its Convention No. 188 or “Work in Fishing Convention” (C188) which is applied to all fishers and all fishing vessels engaged in commercial fishing operations, with the aim of creating decent working conditions for workers in the fisheries sector. C188 stipulates various provisions that include: minimum requirements for work onboard fishing vessels; conditions of service; accommodation and food; medical care, health protection, social security, among others.

As for small-scale fisheries, the “FAO Voluntary Guidelines for Securing Sustainable Small-Scale Fisheries in the Context of Food Security and Poverty Eradication” or SSF Guidelines, which calls for social and economic development to empower the small-scale fishers to assert their human rights, provides the opportunity for the small-scale fishers and fish workers to enhance their socioeconomic well-being. Thus, in the SSF Guidelines, the governments are called upon to ensure that international standards are included in their national legislation, including the right of fishers and fish workers to an adequate standard of living, decent work, and that health, education, and other essential needs are accorded them (FAO, 2014).

In the Southeast Asian region, fishing is considered a difficult job that requires a long period of works with high risk at sea. In several countries, people, therefore, tend to look for easier jobs in other sectors resulting in a shortage

of fish workers that necessitated the recruitment of migrant workers to support the fishing industry. The availability of fish workers onboard fishing vessels has therefore become one of the critical issues for several countries in Southeast Asia. Although the direct responsibility in tackling labor-related issues may not be under the agencies responsible for fisheries in most of the Southeast Asian countries, the involvement of the fisheries-related agencies in ensuring good working conditions, safety, and welfare of people engaged in fisheries activities is unavoidable.

Such concern could also be seen in the ASEAN-SEAFDEC Resolution and Plan of Action on Sustainable Fisheries for Food Security for the ASEAN Region Towards 2030, of which Resolution No. 13 specifies the need to “*Improve the working conditions of people engaged in fisheries activities, and strengthen measures for safety of fishing vessels taking into consideration the specificity of fisheries of the region*”; while the Plan of Action No. 19 also specifies the need to take up priority actions to “*Improve the capability of fishing crew and workers in fishing industry, and conduct educational and skills development program for new crew members and workers entering the industry; while also adopt appropriate technologies to optimize number of crew onboard fishing vessels.*”

Number of fishers and fish farmers and their Conditions in some AMSs

In the Fishery Statistical Bulletin of Southeast Asia published annually by SEAFDEC, some of the AMSs had provided information on their respective numbers of fishers and fish workers, *e.g.* Indonesia, Malaysia, Myanmar, Singapore, Thailand. Although some AMSs that have not submitted their numbers since SEAFDEC had started to include this information in the fishery statistics questionnaire.

Indonesia

The total number of fishers in marine and inland fisheries of Indonesia in 2019 based on the country’s Fisher ID Program (KUSUKA) was 2,387,591 fishers; while the number of aquaculture household units (RTP) was estimated to be 1,583,369 households (broken down into seawater aquaculture of 124,700 households; brackishwater of 232,074 households; and freshwater aquaculture of 1,226,595 households).

The Indonesian government has established policies that are directed to the protection of workers onboard fishing vessels in order to address issues such as safety at sea, under-compensation, lengthy work duration, fish handling, and processing onboard. However, the major concerns in the implementation of such policies are towards the monitoring and reporting system on violations of the regulations.