



Hard Facts, Hidden Problems

A Review of Current Data on Fishing Subsidies

A WWF Technical Paper



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The views and opinions expressed within this report, and the accuracy of its data, are, however, those of the authors and WWF alone, and do not in any way reflect the opinions or viewpoints of the peer reviewers or others whose assistance was sought.

Related WWF publications:

Towards Rational Disciplines on Subsidies to the Fishery Sector: A Call for New International Rules and Mechanisms, September 1998.

Underwriting Overfishing (Issue Summary), September 1999.

Fishing in the Dark (Issue Summary), November 2000.

Fishing in the Dark: Symposium Proceedings, January 2001.

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Preface

The world today is facing a fisheries crisis. In oceans around the globe, according to the Food & Agricultural Organisation (FAO), the majority of commercially valuable fish stocks are either being overfished or are on the brink of being overfished. Meanwhile, consumption is projected to rise, while millions of people around the world look to fish as a principal source of animal protein. Unless something is done, the ability of our oceans to provide food, maintain jobs, and support a rich web of marine life will be sharply compromised in the next century.

A variety of factors underlie today's fisheries crisis. Key among them is the failure of governments and the fishing industry alike to manage the world's fisheries in a sustainable manner. The sad irony is that if fishing were subject to better controls—effective limits on catch size or fishing effort, bans on destructive fishing gear, strategic use of marine protected areas and “no take” zones, etc.—the result would be healthier stocks and a rise in total catches. But, despite hopeful signs in some fisheries, the world remains very far indeed from having universally well-managed fisheries.

Inadequate fisheries management is not the only problem. Contributing to the fisheries crisis—and often complicating efforts to achieve better management—is the fact that today's fishing fleets are way too big. In the aggregate, worldwide fishing capacity has been estimated at up to 250% of the level needed to achieve sustainable fishing levels. In other words, the fishing industry is grossly overcapitalized, with “too many boats chasing too few fish.”

The overcapitalization of the fishing industry is in turn the result of a number of factors. In some cases, poor fisheries management is itself a cause of overcapitalization, as individual fishermen suffer a classic “tragedy of the commons” in a self-defeating race to grab dwindling fish stocks. But there is another cause—a cause that is especially outrageous because it seems so unnecessary—and that is the massive payments made by a number of governments to support their national fishing industries. As confirmed by this report, government subsidies to the fishing industry total an equivalent of billions and billions of dollars every year, often in support of activities running directly counter to sound fisheries policy.

A public debate over fishing subsidies has been underway for several years, dating at least since a 1993 report by the UN FAO concluded that the fishing industry was operating with global costs exceeding commercial revenues by over \$50 billion per year.¹ The debate has gained impetus from a growing list of governments that have joined WWF's call for action to eliminate harmful fishing subsidies. But the question remains controversial, and some governments and elements of the fishing industry are entrenched in their opposition to reform.

Among the doubts raised by opponents of reform is whether fishing subsidies can be a significant problem. Central to that debate is the basic question of how big the subsidies actually are. Unfortunately, a combination of poor record keeping and government secrecy has prevented the public from having a good answer. In fact, government disclosure of fishing subsidies has been so poor that in 1998 WWF found governments were failing to comply with applicable World Trade Organisation (WTO) reporting requirements over 90% of the time.

In the past year, however, reports by two respected intergovernmental bodies—the Organisation for Economic Cooperation and Development (OECD) and the Asia-Pacific Economic Cooperation (APEC)—have produced significant new data. In *Hard Facts, Hidden Problems*, WWF reviews those studies, compiling and comparing the data they provide and juxtaposing that data with other available information. The resulting synthesis provides the most comprehensive collection and critical review of data on fishing subsidies published to date, and allows WWF to

present new evidence that governments are collectively providing subsidies to the fishing industry at a massive scale.

But even as this report builds its analysis on richer data than previously available, it also concludes that governments are still failing to reveal all of the facts about fishing subsidies. Instead, as governments have provided information through different data sources, it has become possible to demonstrate more concretely than before the need for improving the transparency of fishing subsidy programmes.

This report reaches its conclusions while providing what is often a highly technical discussion of the data and analytic issues. In this regard, different elements of the report may address the interests of technicians, policy specialists, and lay readers alike.

At the end of the day, the very fact that the OECD and APEC studies were commissioned is a sign that governments are beginning to respond to the need for better information, and better critical thinking, about fishing subsidies. Indeed, this report should not be seen as a wholesale criticism of those studies. The compilation offered in this WWF report reveals what new empirical conclusions can be drawn from these new and important sources, among others . . . but also shows how far there remains to go before truly complete information about fishing subsidies is made available to the public.

Executive Summary

Government subsidies to the commercial fishing sector have been a topic of growing policy debate for nearly a decade. From the outset, one basic question that has commonly arisen is how much are governments actually giving in support to their fishing industries? While there is little room for doubt that the size and types of fishing subsidies in use today raise strong concerns about their impacts on fish stocks and trading patterns, a precise answer to this basic question has been all but impossible to obtain.

There have, however, recently been two significant intergovernmental efforts to catalogue and quantify fishing subsidies: one by the Organisation for Economic Cooperation and Development (OECD), focusing on the practices of industrialized nations; and one by the Asia-Pacific Economic Cooperation, focusing on the practices of its members around the Pacific Rim. These studies represent the first efforts by any intergovernmental bodies to analyze fishing subsidies on the basis of information collected and formally reported by governments for the purposes of the studies themselves. In combination with a limited amount of data submitted by governments to the World Trade Organisation (WTO), the OECD and APEC studies provide a new basis for examining the scale of worldwide fishing subsidies.

By reviewing the OECD, APEC, and WTO sources, this WWF technical report aims to answer three questions: First, what is the best current calculation of officially reported subsidies to the commercial fishing sector worldwide? Second, what is the quality of this officially reported total and of the information that underlies it? And third, what is the best “guestimate” of actual levels of fishing subsidies available today?

The answers to these three questions can be succinctly summarized as follows: Officially reported subsidies amount to around US\$ 13 billion annually; the data underlying this figure is full of gaps, and thus the figure must be lower than the actual level of subsidization; and WWF’s best “guestimate” is that the actual level of fishing subsidies is at least US\$ 15 billion.

This report offers these conclusions through a five-part narrative report followed by an extensive set of data tables (presented as appendices). The bulk of the research performed for this report is contained in the data tables. The narrative sets out some comparative analysis and conclusions based on that data.

Part I of the narrative report gives a brief comparative description of the principal data sources covered by the report, along with some discussion of the WTO subsidies notification process and of a World Bank paper on fishing subsidies published in 1998. The discussion reveals both some overlap of data and methods among the various sources, as well as some basic differences among them. The OECD and APEC reports had the benefit of being commissioned by governments, and of including new governmental data. All sources apart from the WTO also relied on information and analysis drawn from secondary material. Two of the four sources (the World Bank report and the APEC report) also addressed significant data gaps by advancing estimates based on various kinds of extrapolation.

Part II of the report sets forth an analytic framework within which data from the relevant data sources can be combined and compared. Such a unifying framework is necessary because the sources use somewhat different approaches to defining and categorizing fishing subsidies. The report adopts a modified version of the framework used in the APEC study. This approach produces six principal fishing subsidy categories (classified mainly by the objective of the subsidy), each of which is further subdivided into specific programme types (mainly according to the mechanism or “modality” by which the subsidy is provided).

Part III examines subsidies to the commercial fishing sector *officially reported by governments* through the OECD, APEC, and/or the WTO for the years 1996 and 1997. These years are chosen as the only years for which all three sources have data. As summarized in the following table, data related to 1996 and 1997 can be extracted from these sources and combined (in a manner that seeks to avoid double-counting subsidies reported by more than one source) to arrive at total figures of over US\$ 13 billion and US\$ 8 billion in fishing subsidies for 1996 and 1997 respectively.

Total Officially Reported Fishing Subsidies (US\$)

Source (scope)	1996	1997
OECD report (industrialized countries)	6.95 billion	6.38 billion
APEC report (Pacific Rim countries)	1.91 billion	4.45 billion
WTO notifications (Global—WTO members)	5.85 billion	0.82 billion
Combined Total	13.36–13.53 billion	8.00– 8.32 billion

These figures represent what can be known with precision about the scale of fishing subsidies *on the basis of official reports* through intergovernmental bodies. On one hand, these numbers do not at first appear surprising. In fact, they seem basically consistent with estimates of worldwide fishing subsidies offered by the World Bank and implied in the APEC report. But things are not that simple. In fact, a more careful look at the data reveals that officially reported subsidies currently understate the actual level of subsidization by a substantial margin (perhaps by 100% or more in 1997).

Accordingly, **Part IV** of this report discusses the inadequacy of the officially reported figures, and sets out the main factors contributing to the discrepancy between actual levels of fishing subsidies and what governments have officially reported. These factors include:

- The continued failure by most governments to comply with WTO legal obligations requiring them to report subsidies to a WTO notification registry. (In this regard, evidence compiled for this report adds new and compelling evidence of the extent to which major fishing subsidizers all but ignore this important WTO rule);
- Inadequate cooperation of governments with the OECD and APEC data collection efforts;
- Failure to account fully for important classes of subsidies from which fishing enterprises directly benefit, including certain shipbuilding subsidies, subsidies to the fish processing sector, and payments under government-to-government fishing access agreements;
- Underreporting of “off-budget” subsidies, such as tax preferences or lending support programmes; and
- Failure to account sufficiently for subsidies granted by subnational governments.

Given the inadequacy of officially reported data, **Part V** of this report turns to the challenge of “guestimating” the actual level of fishing subsidies worldwide. For this purpose, the report looks to estimations made by the APEC study and the 1998 World Bank study, among other sources. The APEC study estimates that total subsidies to the wild capture fishing sector in APEC countries is US\$ 8.9 billion. Assuming that aggregate levels of subsidization outside of APEC are roughly comparable to those within APEC, APEC’s 70% proportion of world catch would imply an estimate of US\$ 12.7 billion in global fishing subsidies. This figure falls squarely within the estimate of \$US 11-13.5 billion offered by the World Bank study, and so would seem plausible.

But WWF’s compilation of the data does not simply confirm the previous estimates. On the contrary, the nature of the data demonstrates that the earlier estimates must be too low. There are areas in which the estimates and the official figures do not overlap, and so they must be to some degree cumulative. In combination with the general data gaps described in Part IV, the result is a clear need for an upward correction in both the officially reported data and the estimates offered by APEC and the World Bank before it. Without being able to calculate this correction with precision, WWF concludes that worldwide fishing subsidies should currently be estimated to be at least **US\$ 15 billion**, if not substantially more.

Part I — Intergovernmental Efforts to Measure or Estimate Fishing Subsidies

Fishing subsidies have been the subject of great debate for over a decade.² They have been the object of concern both because of their potential to encourage overfishing and because of their potential to distort trade.³ But while large fishing subsidies have been an important facet of national fisheries policy for many decades (if not, in fact, many centuries!), no one drew significant attention to the extent of subsidy use in the fishing sector until the early 1990s.⁴ In 1993, the **Food and Agriculture Organisation** (FAO) Fisheries Department argued that fishing subsidies were making a significant contribution to the creation and perpetuation of excess fishing capacity.⁵ Using data from the late 1980s FAO estimated that the global fishing sector was losing money, with costs exceeding profits in the global fishing industry by roughly US\$ 54 billion. Such a shortfall led FAO to conclude that government subsidies could account for most of this huge deficit. While the FAO declined to call this figure an actual estimate of subsidization, it clearly established that the scale of fishing subsidies warranted attention.

Soon after the FAO analysis, the **World Trade Organisation** (WTO) Agreement on Subsidies and Countervailing Measures (the Subsidies Agreement) came into force in 1994, requiring member countries to notify the WTO of all subsidies they grant each year.⁶ As a result of this notification obligation, a number of fishing subsidies have been documented by the WTO, beginning in 1995.⁷ These notifications represented (at least potentially) the first global source of information on fishing subsidies. Unfortunately, as discussed below, member countries' notifications have been so slow to arrive and incomplete that the WTO registry has not fulfilled its mission of promoting transparency in fishing subsidy programmes.⁸

Despite a growing body of literature on fishing subsidies after the FAO first publicized the issue in 1993, few publications successfully defined the large number of different types of fishing subsidies in use around the world, or attempted to estimate their size and value. A **World Bank study** published in 1998 was the first major effort to estimate global fishing subsidy levels.⁹ Conducted by Matteo Milazzo, the study estimated global fishing subsidy levels in 1996 by extrapolating from an examination of six of the largest fishing nations in the world – China, the European Union, Japan, Norway, Russia, and the United States. The report was based largely on publicly available information about government budgets in the relevant countries, which taken together represented approximately half of the global fishing effort at the time. Using these and other sources, Milazzo generated estimates for the total levels of fishing subsidies in each country, and then extrapolated from these findings to estimate that global fishing subsidies totaled US\$ 11-13.5 billion¹⁰ for 1996. It is important to remember that these numbers represented best estimates, and while the study did document some examples of specific subsidy programmes, in many cases it relied on extrapolations, including by using global catch levels and FAO reports of global costs and returns associated with the fishing sector.

International attention to fishing subsidies grew sharply starting around 1997 (in part as a result of an international campaign launched by WWF). But it was not until 2000 that significant new efforts to catalogue and estimate fishing subsidies came forward in the form of two independent reports: one performed by the Organisation for the Economic Cooperation and Development (OECD) and one commissioned by the Asia-Pacific Economic Cooperation (APEC).

The first of these was an **OECD report** titled *"Transition to Responsible Fisheries: Economic and Policy Implications"*. This report, for the first time, relied in significant part on information obtained directly from governments for the purpose of the report. The OECD sent questionnaires to all its member countries, requesting information on all government subsidy programmes to the fishing sector that are listed in government budgets.¹¹ The final report included a compilation of

the responses to this questionnaire, supplemented by other research and analysis by OECD staff (including reference to WTO notifications).¹²

A few months later, in the last days of 2000, the **APEC study** was published. Titled *Study into the Nature and Extent of Subsidies in the Fisheries Sector of APEC Members Economies*, the study generated both hard data and estimates of global fishing subsidy levels from responses to surveys of APEC members and interviews with government officials.¹³ The study also made use of the OECD report, the World Bank study, and other available literature. Although the study focussed mainly on the APEC region, it also ventured to provide estimates of total fishing subsidies worldwide.

Taken together, the OECD report and the APEC study represent the most extensive official reports of fishing subsidy programmes currently available, each documenting responses from their respective member countries.¹⁴ Meanwhile, the APEC study and the World Bank study preceding it constitute the two most significant efforts by intergovernmental bodies to extrapolate from government information to estimate total global fishing subsidies.¹⁵

To date, no one has attempted to synthesize these various sources to produce a combined total of all officially reported subsidies to the fishing sector, in order to establish exactly what is currently known about the extent of fishing subsidy use. It is the principal goal of this report to produce such a synthesis.

Part II — An Analytic Framework for Synthesis and Comparison

For the purposes of reviewing the current levels of fishing subsidies around the world and comparing different sources of data, a comprehensive and uniform classification system will be needed as a common frame of reference. Throughout the literature on fishing subsidies over the last decade, there have been many different classification systems proposed and used to attempt to categorize the multitude of different types of fishing subsidy programmes in existence.¹⁶ Rather than reinvent yet another system, this report will draw heavily on the system applied in the APEC study.

There are two basic components to crafting a fishery subsidies classification system: first, the term “fishing subsidy” must be defined (*i.e.*, the scope of the system must be determined); second, a scheme for categorizing the subsidies must be developed.

A. Defining “Fishery Subsidy”

Determining the definition of “fishing subsidy” is not a policy-neutral exercise, especially in the context of growing debate over calls for reform. WWF prefers a relatively broad definition, aiming to include within the term all government supports to the fishing industry that may play a significant role in encouraging overfishing. However, WWF also prefers an approach that is pragmatic and avoids issues not closely related to the links between fishing subsidies and unsustainable fishing practices.

A good starting place is the 1994 WTO Agreement on Subsidies and Countervailing Measures (the “Subsidies Agreement”), which provides the prevailing legal definition of a subsidy in international trade law. The Subsidies Agreement defines “subsidy” as any economic benefit to a specific industry, enterprise or group conferred as a result of:

- Transfers of funds (*e.g.*, grants, loans, equity infusions);
- Potential transfers of funds (*e.g.*, loan guarantees);
- Foregone government revenue (*e.g.*, tax preferences);
- Goods or services (*e.g.*, other than general infrastructure);
- Payments to a funding mechanism or privately held body to perform any of the above; or
- Price or income support programmes (other than tariffs).

The three data sources underlying this report take slightly varying approaches to this definitional issue. The WTO notifications registry consists of submissions by national governments in compliance with the notification obligation in Article 25 of the Subsidies Agreement, which requires notification only of subsidies falling within the WTO definition.¹⁷ In contrast, the OECD study was not even restricted to the examination of “subsidies” *per se*. Rather, it covers “government financial transfers”, which it appears to define as “government interventions” which “alter the incentive structure” of the fishing industry.¹⁸ The APEC study focused on “subsidies”, but adopts a broad definition that explicitly includes “support programmes” that the study admits “would not ordinarily be considered as providing subsidies.”¹⁹ Thus, neither the OECD nor APEC felt restricted by the WTO definition.

The relative narrowness of the WTO definition has the consequence that any government support to the fishing industry falling within its terms would be almost universally considered a fishing subsidy. Both OECD and APEC studies, however, include government supports that one or another participant in the fishing subsidies debate might be reluctant to call “fishing subsidies.” Three such categories of support included in this report deserve brief mention:²⁰

First, government-to-government payments to acquire fishing rights for national fleets (usually in association with intergovernmental agreements known as “access agreements”) are a significant category of government support to the fishing industry, and they are the subject of significant debate over their impacts on fisheries conservation.²¹ However, foreign access payments have not been reported to the WTO, and some governments may consider them as falling beyond the WTO definition.²² Nevertheless, the APEC study calls them “clearly a subsidy,”²³ and both it and the OECD study include access payments in their data, as will this report.

Second, publicly funded construction, improvement, and maintenance of fishing ports and landing facilities is another form of support which may or may not be considered a “fishing subsidy.” Since such supports are often considered “general infrastructure,” they may not be “specific” enough to be considered a subsidy to the fishing industry within the WTO’s terms. However, infrastructure targeted specifically for the fishing industry may influence significantly the economics of harvesting operations, depending on their location, capacity, etc.²⁴ Some public support for fishing infrastructure has been reported to the WTO, and is also included in the subsidy programmes listed by APEC and the OECD. This report will similarly include them.

Finally, publicly funded fisheries management services—such as support for management agencies, stock assessments, enforcement, etc.—are sometimes considered subsidies to the industry. The notion that public management of fisheries can be a subsidy is the subject of significant debate among both economists and policymakers. This debate centers around the appropriate role of the public sector in the management of fisheries resources, and whether these resources are a public good for which taxpayers should fund management and conservation, or if the private sector who benefits from the harvesting of these resources should cover the costs of their management through “full cost recovery” schemes. In any case, management expenditures have not typically been reported to the WTO, but are included in both the APEC and OECD reports. For the purposes of its subsidies reform campaign WWF does not consider the cost of public fisheries management as within the class of fishing subsidies in need of discipline. Unfortunately, the data reported to the OECD and APEC lump management costs into general categories that also include payments (such as decommissioning supports) that clearly ought to be considered subsidies to the fishing industry. Moreover, it appears from the data that governments participating in the OECD and APEC studies treated this question variably. Given the difficulties that would attend an effort to comb all this apart, this report includes OECD and APEC data that at least in part comprises management service costs.²⁵

In addition to the three foregoing kinds of supports included here, two others not included in the data reported in this report also deserve mention. First, given the focus of this report on fishing, subsidies to aquaculture are not included, although they are given substantial treatment by the APEC report. The inclusion of aquaculture subsidies in the APEC report at times complicated this report’s task. There were a few instances in which governments reported programmes covering both wild capture and fish farming, and failed to distinguish amounts between the two. Because it was impossible to determine which portion of the subsidy was targeted at fishing, data about these programmes was not included in this report.

Second, governments sometimes provide substantial support to the fish processing industry—support which obviously may confer significant (if indirect) benefits on the fishing industry itself. Aid to processing can drive the levels of effort and harvesting of fisheries resources, and some studies such as the APEC report do include processing subsidies, estimating them at roughly US\$ 0.7 billion annually.²⁶ However, the economic or other impacts of these subsidies on fishing activities can be extremely difficult to establish or describe, and several estimates (such as the World Bank study by Milazzo) do not attempt it. While the numbers for fish processing subsidies are much smaller than those for harvesting or farming according to the APEC report, they are not

insignificant and certainly deserve further analysis. Nevertheless, this report excludes supports to processing from its definition of “fishing subsidies.”

B. Categorizing Programmes Defined as Subsidies

The classification of fishing subsidies into general categories and specific programme types is necessary for this report as a tool for comparing and combining the data presented by the OECD, APEC, and WTO. In addition, classification provides at least an initial look into the purposes and characteristics of fishing subsidies.

As mentioned previously, there have been several classifications schemes introduced over the years, including most recently in 2000 by the OECD Secretariat, the APEC Fisheries Working Group and the FAO Expert Consultation on Economic Incentives and Responsible Fisheries.²⁷ These different schemes have overlapping categories and any one of them could have been used here, however the APEC scheme most easily lends itself to comparison among the different data sources, because it is so specific. This review will use the APEC classification scheme, with only slight modifications.²⁸ According to this scheme, subsidies to the fishing sector targeted at fish harvesting are classified broadly into six general subsidy types, each of which is subdivided into several more specific programme types, as follows:

1. *Direct Assistance to Fishers and Fisheries Workers*: These include all revenue-enhancing transfers to fishers and fisheries workers from government budgets.
 - Income support programmes – payments to supplement the incomes of fishers and fisheries workers
 - Unemployment insurance – payments targeted specifically for unemployed fishers and fisheries workers
 - Other direct payments to fishers
2. *Lending Support Programmes*: These include all government-funded loans, loan guarantees, and loan restructuring at below commercial lending rates to the fisheries sector.
 - Loan guarantees – including loans provided by private lenders and guaranteed by the government
 - Subsidized loans – loans at below market rates (calculated as the difference between market interest rates and low interest rates, applied to the total value of the outstanding loans)
 - Loan restructuring
 - Other lending support programmes
3. *Tax Preferences and Insurance Support Programmes*: These include all tax preferences and government-funded insurance programmes that benefit the fisheries sector.
 - Fuel tax exemption – for fishing vessels
 - Income tax deferral – for fishers
 - Accelerated depreciation – for taxation of fishing vessels and gear
 - Favorable tax rates on specific inputs or outputs
 - Vessel insurance and reinsurance programmes
 - Other tax preferences and insurance support programmes

4. *Capital and Infrastructure Support Programmes*: These include all government-funded capital inputs and infrastructure investments to the fisheries sector.
 - Development grants – for fisheries enterprises
 - State investments – in state-owned enterprises and cooperatives in the fishing sector
 - Fleet renewal and modernization
 - Foreign access payments – for deep-sea fishing access to foreign fishing waters
 - Bait services – provided to fishers
 - Provision of fish auctions or other sales facilities and services
 - Aid to shipyards – to support fishing boat construction
 - Fishing port infrastructure enhancement – to provide port improvements for fishing fleets
 - Harbor facilities and moorage – provided free or at low rates for fishing fleets
 - Other capital and infrastructure support programmes

5. *Marketing and Price Support Programmes*: These include all government-funded marketing and price support programmes that are designed to reduce capacity and/or enhance the fisheries resource base.
 - Export marketing programmes – to enhance seafood exports
 - Fish product promotion programmes – including seafood product promotion, labeling, quality enhancement for either domestic or external markets
 - Market price support – government support to ensure minimum prices or to keep domestic prices above world prices, captured in the gap between domestic price and border price.
 - Other marketing support programmes

6. *Fisheries Management, Research, Effort Reduction and Conservation Programmes*: These include all government-funded programmes that are designed to reduce capacity and/or enhance the fisheries resource base.²⁹
 - Worker adjustment programmes – payments to assist displaced fishers and fisheries workers to find alternative employment
 - Fisher retraining – to assist fishers and fisheries workers to find alternative employment
 - Vessel buybacks – payments for the permanent withdrawal of fishing vessels
 - Permit buybacks or license retirement (all types) – payments for the permanent withdrawal of fishing permits or licenses
 - Stock enhancement programmes – including fish habitat improvements, release of juveniles, etc.
 - Fisheries management programmes
 - Fisheries enforcement programmes
 - Programmes to assess fish stocks
 - Programmes to identify and develop new fisheries
 - R & D – to develop new fisheries technologies
 - Other Fisheries Management, Research, Effort Reduction and Conservation Programmes

Since the WTO definition of a “subsidy” provides an important element of the in general use, it is worth noting that the classification scheme above bears no direct relation to how a subsidy would be classified under WTO rules (which distinguish “prohibited”, “actionable”, and “non-actionable” subsidies).³⁰

Part III — Officially Reported Subsidies — A Review of the Numbers

The analytical framework set forth in Part II allows the information about fishing subsidies available in current intergovernmental reports to be combined and compared. Specifically, this report presents a compilation of data about specific subsidy programmes drawn from the OECD, APEC, and WTO sources. Since this data is based largely on information reported directly by governments, supplemented by some data collected by intergovernmental bodies (OECD and APEC) acting at the behest of governments, it can be considered “officially reported data” about fishing subsidies. The compilation offered here, summarized in this section and set out in detail in the Appendices, constitutes the most comprehensive presentation to date of officially reported data about global fishing subsidies.³¹

Table 1 summarizes and combines the officially reported data drawn from the WTO, OECD, and APEC sources; Table 2 provides these same totals, but breaks out each subsidy type into its specific subsidy programme categories.³² Before presenting the tables, a few technical comments on the compilation of these tables and the appendices to this report are in order:

First, the compilation of data from the OECD, APEC, and WTO was performed in two steps:

Step 1: Subsidies reported to the OECD and the WTO (and an occasional APEC subsidy) had to be reclassified into the framework adopted for this report. In most cases this did not require significant judgment, as the data were straightforward.³³ The detailed results of this reclassification, on a country-by-country, subsidy programme-by-programme basis can be found in Appendices II and III, for 1996 and 1997 respectively.

Step 2: The reclassified data in Appendices II and III were combined to derive totals for each year. Totals on a country-by-country basis for each of the six general subsidy types are presented in Appendix I. Global totals for each subsidy type are presented in Table 1, while global totals at the more detailed level of subsidy programme type are presented in Table 2. In calculating these totals, the data could not be combined simply by summing them, since there were many cases in which the same subsidy was listed by two or more sources. In cases where an entry in one source seemed obviously to refer to the same subsidy as an entry in another source, only one was counted. In some cases, there were small differences in the amounts reported, in which case the differences contributed to a range, resulting in some totals expressed as ranges. As with reclassifications, judgments were occasionally required to determine whether two sources were reporting the same subsidy.³⁴

Second, the data covered by this report are limited to the years 1996 and 1997 because those are the only years covered by the OECD report, and thus the only years for which global totals of officially reported subsidies could be calculated on the basis of the three available intergovernmental sources.

Third, the task of calculating subsidies for the specific years 1996 and 1997 was complicated by the nature of the APEC study. While the OECD and the WTO specifically reported data for each of those two years, the APEC report did not always do so. The aim of the APEC report appears to have been to arrive at a generic figure approximating total annual fishing subsidies by APEC members. But the report does not break out its data on a yearly basis. The APEC data are presented in an extensive appendix that runs to 169 pages, covering 162 individual subsidy programme entries. The entries are organized by country. Some contain amounts broken out by year, others contain amounts expressed over multi-year periods, and, according to the report

itself, approximately twenty percent of the entries fail to identify any information regarding their yearly value.³⁵ On the basis of this data, as supplemented by a process of estimation, the report derives a few bottom line figures estimating the “total value of APEC programmes and subsidies” developed in the study’s inventory.³⁶ But the report offers no demonstration, and very little explanation, of how its totals were calculated. Nor does it claim to associate the totals with any specific year. Thus, in order to compile the data presented in this technical report it was necessary to go through the APEC appendix entry by entry, extracting data relevant to 1996 and 1997. Where entries expressed values over multi-year periods including 1996 and/or 1997, the amount was divided evenly to give an annual value for inclusion in WWF’s totals for each year.

Table 1 — Total Officially Reported Subsidies, by broad subsidy category (US\$ million)

Category of Subsidy	1996				1997			
	WTO	OECD	APEC	Combined	WTO	OECD	APEC	Combined
Direct Assistance to Fishers and Fisheries Workers	10	338.6	132	339.4 - 341.3	53.2	310	132	353.3 - 358.2
Lending Support Programmes	66.7	157.4	34.1	180 - 192.3	62.3	171.2	385 ³⁷	212.8 - 213.2
Tax Preferences and Insurance Support Programmes	4989 ³⁸	224.9	159.1	5223	14.3	209.4	159.1	218.5 - 229.7
Capital and Infrastructure Support Programmes	664	3850	821	4661 - 4736	651.8	3195	3073.6	4065 - 4302
Market and Price Support Programmes	42.4	86.8	103.1	198.9	35.1	81.7	103.1	183.4 - 185.3
Fisheries Management, Research, Effort Reduction and Conservation Programmes	73.3	2254	662.5	2728 - 2803	7.3 ³⁹	2392	592.4	2947 - 3010
Unclassified Subsidies	0	34	0	34	0	23.7	0	23.7
Total of Subsidies Reported	5846	6946⁴⁰	1912⁴¹	13364–13529	824	6383	4445	8004 - 8322

Table 2 — Total Officially Reported Subsidies, by subsidy programme type (US\$ millions)

	1996				1997			
	WTO	OECD	APEC	Combined	WTO	OECD	APEC	Combined
Direct Assistance to Fishers and Fisheries Workers								
Income Support Payments	8.25	156.6	0	157.4 - 158.3	51.7	86.7	0	129.8 - 133.3
Unemployment Insurance	0	147.9	132	147.9	0	171.9	132	171.9
Other Direct Payments to Fishers	1.6	34.1	0	34.1 - 35.1	1.5	51.6	0	51.6 - 53
Total (to nearest million)	10	339	132	339 - 341	53.2	310	132	353 - 358
Lending Support Programmes								
Loan Guarantees	0	5.4	0.9	6.3	0	0	0.9	0.9
Subsidized Loans	66.7	152	33.2	173.7 - 186	62.3	171.2	384.1	211.9 - 212.3
Loan Restructuring	0	0	0	0	0	0	0	0
Other Lending Support Programmes	0	0	0	0	0	0	0	0
Total (to nearest million)	67	157	34	180 - 192	62	171	385	213
Tax Preferences and Insurance Support Programmes								
Fuel Tax Exemptions	0	160.7	152.8	163.5	2.7	152.7	152.8	155.5
Income Tax Deferrals	0	59.8	0	59.8	11.6	52.4	0	52.4 - 63.6
Accelerated Depreciation	4989	0	0	4989	0	0	0	0
Favorable Tax Rates on Specific Inputs or Outputs	0	0	0	0	0	0	0	0
Vessel Insurance or Reinsurance Programmes	1.3	2.2	6.3	8.5	0	1.2	6.3	7.5
Other Tax Preferences and Insurance Support Programmes	0	2.2	0	2.2	0	3.1	0	3.1
Total (to nearest million)	4990	224.9	159.1	5223	14.3	209.4	159.1	218 - 230
Capital and Infrastructure Support Programmes								
Development Grants - for fisheries enterprises	579.1	552.9	18.5	573.9 - 626.5	623.6	432	26.1	451.3 - 668.9
State Investments - in state-owned fisheries enterprises	17.5	57.7	0	55.4 - 57.7	19.5	48.9	0	48.9 - 51.7
Fleet Renewal or Modernization	59.3	44.9	633	712.4 - 725.7	7.5	39.9	639.9	670.7 - 684.2
Foreign Access Payments	0	312	0	312	0	238.8	0	238.8
Bait Services – Provided to Fishers	0.6	3.2	0	1.6 - 3.2	0	6.7	0	6.7
Provision of Fish Auctions or other Sales Facilities	0	0	0	0	0	0	0	0
Aid to Shipyards – to support fishing vessel construction ⁴²	0	0	0	0	0	0	0	0
Fishing Port Infrastructure Enhancement	3	2872	169.5	3005.9 - 3011.3	1.2	2423	2408	2643.1 - 2646.7
Harbor Facilities and Moorage – provided free or at low rates	0	0	0	0	0	0	0	0
Other Capital and Infrastructure Support Programmes	4.5	7	0	7	0	5	0	5
Total (to nearest million)	664	3850	821	4661 - 4736	652	3195	3074	4065 - 4302

(Table 2, continued)

	1996				1997			
	WTO	OECD	APEC	Combined	WTO	OECD	APEC	Combined
Market and Price Support Programmes								
Export Marketing Programmes	0	0	0	0	0	0	0	0
Fish Product Promotion Programmes	1.86	20.9	10.7	33.5	0.5	0.4	10.7	11.6
Market Price Support	2	65.8	92.4	158.2	0	44.8	92.4	137.2
Other Market and Price Support Programmes	38.5	0.07	0	38.6	34.6	36.5	0	34.6 - 36.5
Total (to nearest million)	42	87	103	230	35	82	103	183 - 185
Fisheries Management, Research, Effort Reduction and Conservation Programmes								
Worker Adjustment Programmes	10.2	16.9	217.6	234.5 - 234.9	1.43	10	217.6	224.5 - 227.9
Fisher Retraining	0.0	0.0	24.4	24.4	0	0	24.4	24.4
Vessel Buybacks	60.7	91.2	0.0	121.7 - 123.2	4	125.8	0	129.8
Permit Buybacks or License Retirement	0.0	86.3	85.5	76.5 - 101.5	0	3.3	0	3.3
Stock Enhancement Programmes	0.0	0.3	4.9	5.2	0	0	4.9	4.9
Fisheries Management Programmes ⁴³	0.5	565.5	136.4	633.6 - 672.4	0	828.5	151.8	902.5 - 934.4
Fisheries Enforcement Programmes ³⁶	0.0	703.8	52.5	756.3	0	719.2	52.5	771.7
Programmes to Assess Fish Stocks	0.0	3.7	2.9	6.6	0	0	2.9	2.9
Programmes to Identify and Develop New Fisheries	0.0	0.0	0.0	0	0	0	0	0
R & D - to develop new fisheries technologies	0.1	755.6	124.8	822.8 - 831.6	1	697.4	124.8	860.9 - 888.6
Other Fisheries Management, Research, Effort Reduction and Conservation Programmes	1.8	31.2	13.5	46.5	1	7.4	13.5	21.9
Total (to nearest million)	73	2254	662	2728 - 2803	7	2392	592	2947 - 3010
Unclassified Subsidies								
Unclassified	0	34	0	34	0	23.7	0	23.7
Total Officially Reported Subsidies	5846	6946⁴⁴	1912⁴⁵	13364-13529	824	6383	4445	8004 - 8322

For readers familiar with the fishing subsidies debate, the totals offered by Tables 1 and 2 may seem in some ways unsurprising, and in some ways odd. First, the total of officially reported subsidies is roughly US\$ 8-13.5 billion, within the basic range of some leading estimates. In particular, as discussed below, the APEC study offers an estimate of US\$ 8.9 billion for all APEC member subsidies to “capture fisheries”—a figure that translates roughly into global fishing subsidies of approximately US\$ 12.7 billion.⁴⁶ Similarly, the 1998 World Bank study estimated global fishing subsidies at US\$ 11-13.5 billion.⁴⁷

On the other hand, the bottom lines for 1996 and 1997 differ from one another by nearly 40%, due almost entirely to a single large Japanese WTO notification (see fn. 38). Tables 1 and 2 also reveal striking variability among the data sources within many of the subsidy categories. Similarly, the results depart substantially from previous estimates offered by the World Bank study, as illustrated in Table 3:

Table 3 — Comparison with 1998 World Bank Study (in US\$ millions)⁴⁸

Category of Subsidy	World Bank	OECD		APEC		WTO	
		1996	1997	1996	1997	1996	1997
Direct Assistance to Fishers and Fisheries Workers	5000 – 6500	338.6	310	132	132	10	53.2
Market & Price Support Programmes		86.8	81.7	103.1	103.1	42.4	35.1
Capital & Infrastructure Support Programmes		3850	3195	821	3073.6	664	651.8
Lending Support Programmes	5000 – 5500	157.4	171.2	34.1	385	66.7	62.3
Tax Preferences & Insurance Support Programmes	1000 – 1500	224.9	209.4	159.1	159.1	4990	14.3
Fisheries Management, Research, and Conservation Programmes	500 ⁴⁹	2254	2392	662.5	592.4	73.3	7.3
Unclassified Subsidies	0	34	23.7	0	0	0	0
Total	11500 -14000	6946	6383	1912	4445	5846	824

Finally, even though the compiled total in Tables 1 and 2 fall within the range of earlier estimates, if the large 1996 Japanese notification is left aside,⁵⁰ the global totals for both 1996 and 1997 come to little more than US\$ 8 billion—substantially lower than most previous estimates of global fishing subsidies.

In fact, the officially reported totals are based on inadequate data, and are undeniably too low. As discussed in the next two parts of this report, they cannot be accepted as a reliable indication of the current extent of subsidization to the fishing industry.

Part IV — The Inadequacy of “Officially Reported” Data

The data on officially reported subsidies underlying this report must be considered as underreporting the actual level of global fishing subsidies for three basic reasons: First and foremost, the basic level and quality of government reporting to each of the data sources (OECD, APEC, and WTO) falls short of acceptable levels. Second, gaps and inconsistencies in the data themselves suggest that the totals fail to reflect the full story. And third, certain classes of government supports were excluded, even though at least a portion of these subsidies directly or indirectly benefit the fisheries sector. Each of these considerations is discussed below.

A. The Unwillingness or Inability of Governments to Make Full Disclosure

Anyone who has studied fishing subsidies is familiar with the endemic lack of transparency in fishing subsidy programmes. The unwillingness or inability of governments to make adequate public disclosure of the facts about their fishing subsidies has been widely observed, and was the subject of a symposium co-sponsored by WWF and The European Policy Center last year.⁵¹ Unfortunately, this lack of transparency was evident in the imperfect cooperation of governments in the data collection efforts by the WTO, the OECD, and APEC.

1. Continuing Failure of Governments to Obey WTO Notification Rules

Of the three data sets used to compile the tables and appendices in this report, only one is based on mandatory government reports. While the OECD and APEC relied on the voluntary responses of governments to their requests for information, the WTO imposes a legal obligation on its members to submit notifications of all subsidy programmes (as defined by the WTO) maintained by them. It is therefore ironic that, as Tables 1 and 2 quickly reveal, with the exception of the large Japanese notification in 1996, far fewer subsidies were reported through the WTO notification registry than through the OECD and APEC studies.

This is not new news. In 1998, WWF reported that WTO members were all but ignoring WTO rules requiring them to submit notifications about their fishing subsidy programmes.⁵² At that time, WWF estimated that WTO members were reporting fewer than ten percent of their fishing subsidies. Today, despite improvements by some governments, the overall performance remains much the same. In fact, the OECD and APEC data serve as dramatic new evidence of this sad reality. Table 3 examines the twelve countries with the largest total fishing subsidies officially reported by the OECD, APEC, and the WTO combined, comparing their officially reported totals with their WTO notifications for the years in question. It is no surprise that these twelve countries, in addition to being among the largest subsidy providers, were also responsible for over half of the world’s total marine fish production in 1997.⁵³

Table 4 — WTO Coverage of Major Fishing Nations

Country	Officially Reported Subsidies to Fish Harvesting (US\$ M) ⁵⁴		Total Subsidies to Fish Harvesting Reported to WTO (US\$ M)	
	1996	1997	1996	1997
Japan	8173	2925 - 2946	5,016	0
EU	939 – 992	775 – 995	615	658
USA	859 – 862	868	0	0
Canada	779 – 818	742 – 793	8	1
Russia	633	633	NA	NA
Korea	367	341 – 352	38	53
Indonesia	254	254	0	0
Chinese Taipei	114	188	NA	NA
Norway	165 - 178	158 – 163	13	22
Spain	138 - 142	165 – 175	71	73
Italy	80	65	0	0
China	55	50	NA	NA

Even allowing for some subsidies to fall outside the WTO definition, this table makes very clear how far the WTO notification mechanism is from fulfilling its mission. Only the EU and its members display any real consistency between their WTO notifications and their level of subsidization as captured by the OECD and APEC.⁵⁵ The discrepancies for other WTO member countries are patent. The table also reveals that several countries that are not members of the WTO are major fishing nations that also are significant subsidizers—suggesting that the WTO data would be incomplete even if compliance with WTO reporting mechanisms were adequate.

The fact that WTO notifications fall far short of what governments have revealed through the OECD and APEC does not mean that WTO notifications were always redundant in compiling the data presented in this report. The outstanding example is the US\$ 5 billion subsidy reported by Japan to the WTO in 1996, but not included in either the OECD or APEC studies. A quick review of Appendices II and III reveals a significant number of subsidy programmes reported to the WTO that do not appear to have been captured by either the OECD or APEC studies. This implies that fuller compliance with the WTO notification requirement would very likely raise the total amount of officially reported subsidies.

2. Inadequate Reporting to OECD and APEC

Both the OECD and APEC studies relied heavily on information solicited directly from governments by the authors of the studies. Neither body, however, received full—or even, in WWF’s view, satisfactory—cooperation. In the case of the OECD, the inadequacy of cooperation is evident in the very disparate level of data and details it received from country to country. The Japanese contribution appears especially thin in this regard.⁵⁶ In the case of APEC, the consultants hired to conduct the study distributed questionnaires to all twenty-one APEC members, but received only ten back. In the case of that study, it is the data for the People’s Republic of China that seems especially shy (see discussion in the next section and in Part V, below).

Inconsistencies and gaps between the OECD and APEC reports also reveal numerous cases in which governments provided incomplete reports to one or the other of the bodies. Government responses to OECD and APEC often failed to provide monetary values for the subsidies reported. In the case of APEC, 20% of the subsidies were reported without useful monetary data.⁵⁷ Additionally, although OECD requested information from regional and local governments, the

data they received was uneven and inconsistent, with the result that subsidies granted by local governments are not included, nor are price supports. Finally, some of the data provided was muddled even where figures were given. For example, there were several instances in which it was impossible to determine which portion of a given subsidy was targeted to fish harvesting and which to fish farming. In such cases, the subsidy programme is not included in this report. Taken together, these factors guarantee that the officially reported subsidies presented here represent less than the full set of fishing subsidies even from the countries who submitted data to the three underlying sources.

3. Some Examples

The inadequate and inconsistent reporting of governments is evident in the data. A sampling of issues in specific countries illustrates the point:

Japan – According to available evidence, Japan provides the largest amount of subsidies to the fishing sector in the world. Based on the OECD reports, Japan provides over US\$ 2 billion annually to the fishing sector, almost twice the value estimated by the World Bank study.⁵⁸ However, almost the entire US\$ 2 billion reported by the OECD is Capital & Infrastructure Support Programmes. However, the World Bank study estimates over US\$ 500 million in fishing vessel insurance and re-insurance programmes, US\$ 200 million in foreign access payments, and almost US\$ 270 million in a variety of measures to improve harvesting techniques.⁵⁹ It is arguable that the OECD report and the World Bank estimates could be aggregated to over US\$ 3 billion in subsidies to the fish-harvesting sector.

While these two sources are conflicting, the Japanese notifications to the WTO are an entirely separate matter. Despite the different programmes highlighted by the OECD and World Bank, Japan reports no dollar values to WTO for fishing subsidies in 1997 and an enormous US\$ 5 billion subsidy programme of tax preferences in 1996.⁶⁰ The programme outlined in the Japanese WTO notifications grants accelerated depreciation for fishing vessels that can be claimed as a tax deferral. Values are given for the six years up to, and including, 1996 by the specific fishery. In looking at these values it is hard to determine if the dollar amounts given are the subsidy effect (as stated in the notification) or perhaps total production of the fishery multiplied by the average ex-vessel price. Regardless of the meaning of the Japanese notification, there is no consistency between the reports and estimates of subsidy programmes to the fishing sector in Japan, and further investigation will be required to determine accurate fishing subsidy levels.

Korea – The official reports of annual fishing subsidies in Korea total US\$ 340 - 365 million in 1996 and 1997, yet Korea only notified the WTO of roughly US\$ 40 – 50 million.⁶¹ The OECD reports a subsidy programme to enhance fishery resources of US\$ 65 million annually that is not included in the WTO notification, as well as over US\$ 160 million in Capital & Infrastructure Support Programmes in the fishing sector that is not reported to the WTO. This discrepancy between the fishing subsidies that Korea reported to the WTO and to the OECD is fairly common among WTO member countries and highlights a lack of transparency in fishing subsidies that will be discussed in further detail in Section VIII.⁶²

Canada – Similar to the Korean example, Canada reported roughly US\$ 800 million in annual fishing subsidies to OECD and APEC, yet provides the WTO with no dollar amounts for any of these subsidies.⁶³ The majority of these subsidies are income support and unemployment insurance provided to self-employed and wage-earning fishers, which

arguably maintain levels of employment and capacity in the fishery not otherwise feasible. Again, these subsidies were reported in the OECD and APEC studies, but have not been notified to the WTO.

United States – While the United States has notified the WTO each year of the diesel fuel taxrebate it provides fishing vessels, these notifications contain no monetary values for this subsidy or any other provided to the fishing sector. However, the OECD reports the annual value of this fuel rebate at US\$ 150 million. In addition to this programme, the OECD and APEC report several others for a total of roughly US\$ 860 million.⁶⁴ Similarly, the World Bank estimates a total of US\$ 289 million, yet for some reason these values are not included in the WTO notifications.

China – Far and away, China claims the largest proportion of the global fish harvest, responsible for almost 15% of the world's marine fish production.⁶⁵ In contrast to recent trends in most other fisheries, China has enjoyed remarkable growth in its fishing sector, as capture and farmed fish output has multiplied from under 5 million tons in 1970 to almost 25 million tons in 1996. The World Bank study states “there is little doubt that, during the last two decades, the Chinese government has aggressively promoted increased capture fisheries production with a programme of fishing vessel construction, repair, modernization, and purchase from abroad.”⁶⁶ As a result, the study reports that China's modern fishing fleet roughly quadrupled in just a decade and a half beginning at the end of the 1970s. The only available data for Chinese fishing subsidies, the responses provided to APEC, appear to support these numbers. While the APEC study only reports roughly US\$ 50 million in annual fishing subsidies, numerous subsidy programmes are listed without values.⁶⁷ Several of these programmes state enhanced fish-harvesting capacity and production as their objectives:

- Hainan Province Marine Fishery Development Programme – The objective of the programme is to increase total marine production in the Hainan Province to 750,000 tons by 2002, through tax preferences and targeted infrastructure support among other programmes.
- Fujian Province Fishery Pillar Industry Development Programme – Similar to the above programme, the objective is to increase fishery products in the Province to 4.8 million tons by 2000 and 8 million tons by 2010, through tax preferences and targeted infrastructure support to the fish-harvesting sector, as well as other programmes such as aquaculture.
- Heilongjiang Province Fisheries Sector Development Programme – The objective is to increase total marine production to 350,000 tons by 2000, of which 300,000 would result from aquaculture. Subsidies to the fish-harvesting sector include tax preferences and insurance support programmes.
- Guizhou Province Fisheries Sector Development Programme – The objective is to increase total marine production to 50,000 tons by 2000, through tax preferences and infrastructure support programmes as well as aquaculture.

This list could continue, but it is clear from these four programmes that China's government is supporting fisheries development and expansion, and that there is very little information available as to how they are doing it. The 1998 World Bank study estimated that China provides roughly US\$ 700 – 800 million in annual subsidies to the fish-harvesting sector, yet only US\$ 50 million has been officially reported. Hopefully China's entrance into the WTO will make more information accessible.

Russia – Although Russia’s fleet was downsized rapidly after the collapse of the Soviet Union, it was once one of the largest fishing fleets in the world, and may be in the process of rebuilding. The World Bank study points out that under the Soviet regime, the fleet was generously supported and ‘grossly overcapitalized’. It is impossible to speculate how many of these subsidies are still in effect and supporting the aging fleet, but APEC reports a programme providing over US\$ 600 million annually to scrap older vessels and replace them with newer factory trawlers.⁶⁸ The programme, named Ryba, aims to scrap or completely rebuild 77% of the fishing fleet and 60% of the support fleet by 2001. Scrapped vessels are to be replaced by new factory trawlers from Norway, Germany, and Spain, all of which very possible could have been built using some of the domestic subsidies to the shipbuilding industry listed in Section VI. As Russia is not a member of the WTO and the World Bank study is unable to make an estimate, this report from APEC is the only officially reported Russian subsidy programme.

China and Russia both serve as excellent examples of large fishing nations which are not currently members of the WTO or the OECD, and for which there is very little information available concerning fishing subsidies. As the available evidence indicates, it would appear that both nations, as well as other non-WTO members such as Chinese Taipei, provide large subsidy programmes to their fish-harvesting sectors.

B. Exclusion or Underreporting of Certain Subsidy Types

Certain classes of subsidies also were either excluded or tended to be underreported by official data. As discussed in Part II.A., above, shipbuilding subsidies were generally excluded. This exclusion may make sense as a result of the current difficulty of distinguishing shipbuilding for general maritime commerce from that destined for fishing. However, as the next subsection argues, that does not mean all shipbuilding subsidies should be excluded from consideration. Other classes of subsidies were formally included in the data sets, but some combination of definitional issues, bad bookkeeping, and absence of political will appears to have kept governments from adequately reporting them.

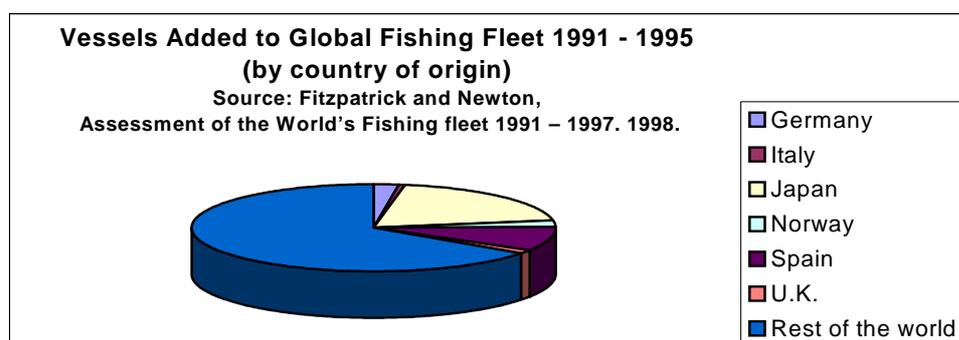
1. Shipbuilding Subsidies

Shipbuilding is one of the most heavily subsidized industrial sectors in the world. At this point, it is unclear exactly how much of this aid that goes to shipbuilders benefits the fishing industry, or goes directly to construction of fishing vessels. Without specification in the government reports of shipbuilding subsidies, we can only speculate on the benefits to the fishing industry. However, it is instructive to look at shipbuilding subsidies reported to the WTO in 1996 and 1997, particularly at the countries reporting them.

According to notifications sent to the WTO, six countries provided over US\$ 8.4 billion in aid to the shipbuilding sector in 1996, and in 1997 eight countries reported almost US\$ 4.5 billion.⁶⁹

Table 5 — Subsidies to the Shipbuilding Sector Reported to the WTO (US\$ million)

Country	1996	1997
Australia	18.6	16.7
Belgium	Not reported	1.6
Germany	500.3	98.8
Italy	Not reported	676
Japan	6,893	3,553
Norway	191.1	91.9
Portugal	Not reported	12.5
Spain	503.1	Not reported
United Kingdom	302.3	7.5
Total	8,408	4,458



It is interesting to note that the countries with the largest subsidies to the shipbuilding sector – Germany, Italy, Japan, Norway, Spain, and the United Kingdom – all made significant contributions to the global fishing fleet in the years just prior to 1996 and 1997. Over the period of 1991 to 1995, these six countries alone contributed over 1/3 of the new vessels added to the global fishing fleet.⁷⁰ It is impossible to determine how much of the costs of building 541 new fishing vessels was financed through the subsidies reported above, but the European Union recently reported that operating aid to the EU shipbuilding sector covered “new constructions, conversions, and fishing vessels.”⁷¹ While the EU did not specify subsidy amounts, it is clear from this statement that one of the major targets of operating aid to the shipbuilding sector is fishing vessels.

Based on the above information, six to eight countries alone provided US\$ 4 – 8 billion in annual subsidies to the shipbuilding sector, as well as provided over 1/3 of the new fishing vessel additions to the global fleet over 1991 to 1995. Thus, failure to estimate economic benefits conferred on the fishing sector as a result of subsidies to shipbuilding would appear to be a glaring omission from accurate estimates and reports. At present, country notifications to the WTO offer no specifications on the amounts of aid to shipbuilding that benefit the fishing sector and result in construction or re-construction of fishing vessels. Even the EU admits that one of the major targets of aid to shipbuilding is fishing vessels, but fails to provide specific amounts. The World Bank study attempted to account for this omission by estimating the annual replacement value of the global fishing fleet (US\$ 10 billion) and taking 10% of that value as the rate of subsidization from the shipbuilding sector, for a total of US\$ 1 billion. This estimate is the only current attempt to monetize shipbuilding aid that benefits the fishing sector, however it seems clear that portions of this aid do benefit the fishing sector, and countries should be asked to provide more specific information concerning the destinations of aid to the shipbuilding sector.

2. “Off Budget” or “Underbudgeted” Support Programmes

While certain categories of subsidies are easy to report and pinpoint, such as Direct Assistance to Fishers & Fisheries Workers, Lending Support Programmes and Tax Preferences & Insurance Support Programmes are generally not as clearly outlined in countries’ budgets. The World Bank study notes that many of these subsidies are not identified in the budgets of fisheries agencies but rather other government agencies, or by their nature are unbudgeted or under-budgeted.⁷² The OECD report also states that tax concessions are often unreported or only partially captured in governments’ budgets.⁷³ Commonly, governments will budget the costs of administering a soft loan or tax preference programme, with no knowledge of the actual subsidy value of the programme.

The United States’ Capital Construction Fund Programme is an excellent example of a subsidy programme where the costs of administration are known and reported, but the actual subsidy values are not. According to U.S. reports to APEC,⁷⁴ the fund allows fishermen to defer tax on income earned from operating their fishing vessels. The amount accumulated by deferring tax on fishing income can be used to construct, re-construct, or under limited circumstances, acquire fishing vessels. The U.S. government reports that the fund currently has deposits of roughly US\$ 240 million, with an average annual cost to the government of operating the programme at US\$ 2–2.5 million. Neither of these figures directly represents the actual subsidy value created by this fund—presumably at least equivalent to the tax burden avoided by fishers using the fund. For the purposes of the data presented here, only the US\$ 2.5 million cost has been included. But the actual tax relief must have been much higher. Moreover, since funds from the CCF can at present only be removed (without suffering a tax penalty) for activities associated with the expansion or maintenance of fleet capacity, one could argue that the entire fund is acting as a government-induced incentive. In any case, the example clearly shows how this kind of reporting leads to substantial underestimates of real subsidy levels.

The off-budget nature of these kinds of subsidies tends to make tracking their subsidy value a challenge, and the underreporting of them should not be viewed as simply intentional. It should be no surprise, then, that with such difficulties only US\$ 435 million in Lending Support Programmes and Tax Preferences & Insurance Support Programmes were reported in 1997. However, the World Bank study estimates an annual total of US\$ 5 billion in lending programmes and US\$ 1 billion in tax preferences, stating that “it is entirely possible...that subsidized loans and tax preferences are collectively the major form of financial assistance in [the fishing] sector.”⁷⁵

The World Bank study builds much of the case for these estimates based on observations and anecdotal evidence from experts around the world such as FAO representatives. The study takes FAO’s 1993 figures on annual costs to the fishing industry, and assumes that US\$ 50 billion of the US\$ 80 billion in supplies and gear, maintenance and repair, and capital costs are borrowed through subsidized lending programmes. Taking the total economic benefits to the recipients of this subsidized lending to be ten percent, the World Bank study then arrives at an estimate of US\$5 billion annually in subsidies lending programmes to the fishing sector.

Unfortunately, it is impossible to determine how these annual costs to the global fishing sector are financed, and there is little documentation concerning subsidized lending programmes to the fishing sector. However, it seems clear that Lending Support Programmes in the fishing sector are probably far more prevalent than has been reported to or by the WTO, OECD, and APEC. The impact of these subsidized loans will continue to remain the subject of debate, and the team that reviewed the impact of the US Capital Construction Fund found that there was just as much fleet expansion without the subsidized loans as with them, noting that the policy framework was generally the overriding factor in investment decisions rather than subsidies.

Similar to Lending Support Programmes, World Bank estimates suggest Tax Preferences & Insurance Support Programmes in the fishing sector are far greater than are currently reported. According to the World Bank study, annual lost revenues as a result of tax preferences to the fish sector are roughly US\$ 250 million in the U.S., and US\$130 million each in China and Taiwan.⁷⁶

In addition to these cases, the study cites an example in the Japanese longline fisheries for tuna and billfish in Australian waters where a diesel fuel taxrebate totaled US\$ 91 million in 1996.⁷⁷ If these examples are correct, than the global level of tax preferences to the fishing industry would probably exceed this level of roughly US\$600 million, and certainly exceed the currently reported annual levels of roughly US\$ 220 million (Japanese Tax Preference Programme of almost US\$ 5 billion not included in either the World Bank estimates or the currently reported levels given here).

While there are inherent difficulties in the government accounting of lending programmes and tax preferences in many countries, it is hard to imagine that the reported levels for these types of subsidies to the fishing sector are little more than 5% of the total. It is interesting to compare the composition of the three estimates or reports here:

Example of under-reported tax concessions – China

Hainan Province Marine Fishery Development Programme

The information China provides APEC concerning this seemingly large subsidy programme is an excellent example of either the lack of information that governments themselves possess about their tax concession programmes to the fishing sector, or the lack of information they are reporting.

According to the APEC study, as part of a programme to increase total marine production in the Hainan Province to 750,000 tons by 2002, the government issued the following policies (among others):

- Elimination of import tariffs and VAT taxes on imported materials for infrastructure construction of marine fishing ports, seafood warehouses, etc.
- For marine capture fisheries around Nansha Island, no agricultural specialty taxes will be levied at all.

These are but two policies of several, many of which are targeted towards aquaculture or processing, but they highlight the types of programmes which governments may report official policies but little or no data on subsidy amounts. In all likelihood, the Hainan Provincial People's Government has no records or data estimating the amount of agricultural specialty taxes foregone, or the import tariffs and VAT taxes eliminated.

Many governments around the world may offer such tax preferences and concessions to the fishing sector, but rarely do they know or report the subsidy value of the programmes.

Source: APEC, pp. 20 – 21, Appendix A.

Table 6 — Comparing Reports of Lending Support & Tax Preference Programmes

Source	Total Subsidies to the Fish-Harvesting Sector	% Lending Support Programmes & Tax Preferences & Insurance Support Programmes	Annual Value Lending Support Programmes & Tax Preferences & Insurance Support Programmes
World Bank Est. (1996)	US\$ 11.5 – 14 billion	50 – 52%	US\$ 6 to 7 billion
APEC Est.	US\$ 8.9 billion	??	??
Documented (1997)	US\$ 8.0 – 8.5 billion	5 %	Approx. US\$ 431 – 443 million

The composition of the APEC estimate is not available, but based on the percentages given in the documented list of fishing subsidies, it would total roughly US\$ 445 million, or based on the composition estimated by the World Bank study it would total roughly US\$ 4.75 billion. While the correct total of Lending Support Programmes and Tax Preferences & Insurance Support Programmes probably lies somewhere between the reports and the World Bank estimate, it seems clear that these types of subsidies are currently under-reported by governments, and more than likely unclear in many budgets.

Part V — Guestimating the Actual Scale of Fishing Subsidies Worldwide

The foregoing discussion leads to two fundamental conclusions: first, that officially reported fishing subsidies can now be proved to be on the order of US\$ 13 billion per year; and second, that the data underlying officially reported subsidies offers an incomplete account of the actual scale of subsidization. These conclusions beg the obvious question, what is the actual scale of government supports to the commercial fishing sector?

The answer cannot be known with certainty. On the basis of currently available information, however, WWF believes the correct answer must be at the least US\$ 15 billion, and very possibly higher. These numbers are higher than estimated by the World Bank in 1998, which posited an estimated range of US\$11-13.5 billion.⁷⁸

In addition, WWF's estimate is higher than the level of worldwide fishing subsidies implied by the APEC report. As noted above, the APEC study itself had to resort to estimation in order to reach an overall conclusion about the level of fishing subsidization among APEC members.⁷⁹ The calculations by which this estimation was performed are not revealed by the APEC study authors. After briefly reporting their methodology, the authors simply offer their bottom line: subsidies to the APEC "capture fisheries" sector currently amount to US\$8.9 billion.⁸⁰ The APEC study declined to extrapolate from this figure to estimate fishing subsidies worldwide. However, the report points out that APEC members account for roughly 70% of global fish production, and imply that a linear extrapolation from that figure would not be wholly out of line. Such a calculation would give a global total of only US\$12.7 billion—less than the total officially reported subsidies WWF calculates for 1996, and much less than the US\$ 15 billion or higher that WWF offers as the actual global level.

There is good reason the estimate WWF offers here is higher than the others. To start with, Part III of this report calculates officially reported subsidies in 1996 totaling more than US\$ 13 billion. While the figure for 1997 came to only US\$ 8 billion, the 1996 total seems more accurate, unless it is assumed that the level of support to the fishing industry in Japan varied by 60% or more from one year to the next.⁸¹ Thus, this report's compilation of officially reported subsidies alone approximates the total estimated level of subsidies offered by APEC.

Some would argue that this serves simply to confirm the accuracy of APEC's estimate—but that moved things backwards. Rather, the analysis underlying the APEC estimate gives an additional demonstration (beyond the discussion in Part IV, above) that the compiled official figures are too low. As already noted, the data officially reported to APEC were incomplete on their face (that is why the authors resorted to estimation to arrive at their ultimate conclusions). To say that WWF's tally of officially reported subsidies confirms the APEC estimate would be to argue implicitly that WWF's act of compiling data from various official sources merely filled in the same gaps filled in by the APEC report's process of estimation. Specifically, it is to suggest that, by chance, the subsidies officially reported through the WTO and the OECD were the same subsidies that were estimated (beyond reported values) by APEC. But if that is not so—if APEC estimated some subsidies not reported by the OECD or the WTO, or if the OECD and WTO reported some subsidies not included by APEC—then any "non-overlapping" subsidies would have to be added to the bottom line (along with any subsidies that are simply not reported or underreported by all three sources).

Such non-overlapping subsidies appear certain to exist. For example, there are subsidy programmes revealed in APEC's inventory without associated values⁸² that are not included in the OECD or WTO data.⁸³ In short, the APEC estimates and at least some of the officially reported data are cumulative.

Moreover, beyond what can be demonstrated directly by comparing the APEC data with the OECD and WTO data, further comparison of the entire data set underlying this report with the 1998 WTO study.

But why should these non-overlapping and underreported subsidies be taken to add a minimum of nearly US\$ 2 billion in additional subsidies? While no rigorous effort to catalogue or value these non-overlapping subsidies is offered here, a brief review of some plausible figures is illustrative. Two billion might easily be discovered in the following:

- Subsidies officially reported by China in the APEC study are on the order of US\$ 50 million per year. But this figure is highly implausible for a country with a state economy and a fishing fleet that is one of the largest and fastest growing in the world. Like APEC, the 1998 World Bank study was unable to obtain significant data from China, and did not estimate Chinese fishing subsidies directly, but did review the scale of Chinese fishing, and identified the equivalent of billions of dollars in government budget allocations much of which were likely used for fisheries development.⁸⁴ As discussed above, the APEC report itself contained descriptions of very large Chinese subsidy programmes for which no monetary values were provided. On the strength of evidence such as this, it does not seem unreasonable to believe that China alone accounts for a billion dollars in fishing subsidies that have not been officially reported.
- As noted above, “off budget” subsidies such as tax preferences and lending programmes may have been underreported in official sources by a factor of ten. The World Bank estimated such subsidies globally on the order of US\$ 6-7 billion in 1996, whereas less than half a billion was officially reported by the OECD, APEC, and the WTO in 1997. It would be conservative to estimate subsidies totaling another billion or two beyond what is officially reported in this category.

These are just two examples of the many gaps and non-overlapping programmes identified above and in the attached appendices. A more complete effort at such estimation would yield significantly more.

Conclusions

The compiled data presented in this technical report creates a sound basis for calculating officially reported subsidies that total around US\$ 13 billion a year. This figure alone, now essentially representing “proven” subsidies, equals or exceeds the figures given or suggested in the authoritative efforts by the World Bank and by APEC to estimate worldwide subsidies. But these official figures are full of holes, and a comparison of them with each other and with the World Bank and APEC estimates effectively proves that the officially reported figures are too low. While a finer estimate of the still unaccounted subsidies is an analytic exercise for another day, even a cursory glance at the evidence suggests they amount to at least US\$ 2 billion, and possibly much more.

In short, governments have now given us the wherewithal to say that the fishing subsidies we can see are massive, and yet that what we can see is still far from the whole story.

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**Hard Facts, Hidden Problems:
A Review of Current Data on Fishing Subsidies**

APPENDICES

Appendix I: 1996, 1997 Country-by-Country Subsidy Totals

Australia

Category of Subsidy	Combined #'s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #'s	Total #'s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #'s
Direct Assistance to Fishers and Fisheries Workers								
Lending Support Programmes								
Tax Preferences and Insurance Support Programmes					7.8	7.8		
Capital and Infrastructure Support Programmes								
Marketing and Price Support Programmes								
Fisheries Management and Conservation Programmes	33.9	33.9		15.9	8.1	8.1		

Belgium

Category of Subsidy	Combined #'s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #'s	Total #'s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #'s
Direct Assistance to Fishers and Fisheries Workers	0.1	0.1			0.2	0.2		
Lending Support Programmes								
Tax Preferences and Insurance Support Programmes								
Capital and Infrastructure Support Programmes	0.8-1.5	1.5	0.6		1.3	1.3		
Marketing and Price Support Programmes								
Fisheries Management and Conservation Programmes	2.2	1.7	0.5		1.5	1.5		
Unclassified Subsidies	0.03	0.03			0.04	0.04		

Canada

Category of Subsidy	Combined #'s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #'s	Total #'s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #'s
Direct Assistance to Fishers and Fisheries Workers	213-248	248.3		132	251-261	261		132
Lending Support Programmes	8.7	8.7			5.4	5.4		
Tax Preferences and Insurance Support Programmes					0.1	0.1		
Capital and Infrastructure Support Programmes	32.1-34.6	34.6		32.1	32-36	35.7		32.1
Marketing and Price Support Programmes								
Fisheries Management and Conservation Programmes	489-503	107	1.7	482	488-515	205.6	6.1	482.3

China

Category of Subsidy	Combined #'s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #'s	Total #'s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #'s
Direct Assistance to Fishers and Fisheries Workers								
Lending Support Programmes								
Tax Preferences and Insurance Support Programmes								
Capital and Infrastructure Support Programmes	54.7			54.7	50.3			50.3
Marketing and Price Support Programmes								
Fisheries Management and Conservation Programmes								

Denmark

Category of Subsidy	Combined #'s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #'s	Total #'s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #'s
Direct Assistance to Fishers and Fisheries Workers	0.4	0.4	0.4		0.3 - 0.4	0.4	0.3	
Lending Support Programmes								
Tax Preferences and Insurance Support Programmes								
Capital and Infrastructure Support Programmes	1.8-3.1	3.1	1.3		2.1-2.8	1.2	2.8	
Marketing and Price Support Programmes								
Fisheries Management and Conservation Programmes	52.8-60.2	54.2	7.6		61.1	61.1	6.2	
Unclassified Subsidies	1.3	1.3			1.5	1.5		

European Union

Category of Subsidy	Combined #s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #s	Total #s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #s
Direct Assistance to Fishers and Fisheries Workers								
Lending Support Programmes								
Tax Preferences and Insurance Support Programmes								
Capital and Infrastructure Support Programmes	647-865	647	623.6		837-890	837.2	576.9	
Marketing and Price Support Programmes	70.5-72.4	47.2	59.8		74.9-82	42.5	70.9	
Fisheries Management and Conservation Programmes	82.4	82.4			52	52.0		

Finland

Category of Subsidy	Combined #s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #s	Total #s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #s
Direct Assistance to Fishers and Fisheries Workers	3	3			2	2.2		
Lending Support Programmes	0.004	0.004			0.02	0.02		
Tax Preferences and Insurance Support Programmes								
Capital and Infrastructure Support Programmes	0.6	0.6			0.6	0.6		
Marketing and Price Support Programmes								
Fisheries Management and Conservation Programmes	20.9	20.9			24.4	24.4		
Unclassified Subsidies					0.07	0.07		

France

Category of Subsidy	Combined #s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #s	Total #s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #s
Direct Assistance to Fishers and Fisheries Workers	3.9	3.9			4.5	4.5		
Lending Support Programmes	13.5	13.5						
Tax Preferences and Insurance Support Programmes								
Capital and Infrastructure Support Programmes	8.4	8.4			9.5	9.5		
Marketing and Price Support Programmes								
Fisheries Management and Conservation Programmes	74.6	74.6			85.2	85.2		
Unclassified Subsidies	7.6	7.6			8.7	8.7		

Germany

Category of Subsidy	Combined #s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #s	Total #s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #s
Direct Assistance to Fishers and Fisheries Workers					7.0	7.0		
Lending Support Programmes	2.7	2.7			3.8	3.8		
Tax Preferences and Insurance Support Programmes								
Capital and Infrastructure Support Programmes	2.9	2.9			4.9	4.9		
Marketing and Price Support Programmes								
Fisheries Management and Conservation Programmes	44.8	44.8			52.3	52.3		
Unclassified Subsidies	0.2	0.2			0.3	0.3		

Greece

Category of Subsidy	Combined #s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #s	Total #s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #s
Direct Assistance to Fishers and Fisheries Workers								
Lending Support Programmes								
Tax Preferences and Insurance Support Programmes								
Capital and Infrastructure Support Programmes	1.5	1.5			1.6	1.6		
Marketing and Price Support Programmes								
Fisheries Management and Conservation Programmes	36.9	36.9			41.8	41.8		
Unclassified Subsidies	0.2	0.2			0.2	0.2		

Hong Kong

Category of Subsidy	Combined #s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #s	Total #s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #s
Direct Assistance to Fishers and Fisheries Workers								
Lending Support Programmes								
Tax Preferences and Insurance Support Programmes								
Capital and Infrastructure Support Programmes								
Marketing and Price Support Programmes								
Fisheries Management and Conservation Programmes	12.8			12.8	12.8			12.8

Iceland

Category of Subsidy	Combined #s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #s	Total #s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #s
Direct Assistance to Fishers and Fisheries Workers								
Lending Support Programmes								
Tax Preferences and Insurance Support Programmes	18	18			21.9	21.9		
Capital and Infrastructure Support Programmes								
Marketing and Price Support Programmes								
Fisheries Management and Conservation Programmes	18.2	18.2			19.4	19.4		

Indonesia

Category of Subsidy	Combined #s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #s	Total #s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #s
Direct Assistance to Fishers and Fisheries Workers								
Lending Support Programmes								
Tax Preferences and Insurance Support Programmes								
Capital and Infrastructure Support Programmes	18.5			18.5	18.5			18.5
Marketing and Price Support Programmes	98.2			98.2	98.2			98.2
Fisheries Management and Conservation Programmes	137.7			137.7	137.7			137.7

Ireland

Category of Subsidy	Combined #s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #s	Total #s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #s
Direct Assistance to Fishers and Fisheries Workers	0.5	0.5			0.8	0.8		
Lending Support Programmes								
Tax Preferences and Insurance Support Programmes	2.7	2.7	2.7		3	3	3	
Capital and Infrastructure Support Programmes	3	3			3.2	3.2		
Marketing and Price Support Programmes								
Fisheries Management and Conservation Programmes	86.6	86.6			91.3	91.3		
Unclassified Subsidies	0.08	0.08			0.08	0.08		

Italy

Category of Subsidy	Combined #s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #s	Total #s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #s
Direct Assistance to Fishers and Fisheries Workers	37	37			39.4	39.4		
Lending Support Programmes	1.2	1.2			1.2	1.2		
Tax Preferences and Insurance Support Programmes								
Capital and Infrastructure Support Programmes	11.5	11.5			24.2	24.2		
Marketing and Price Support Programmes								
Fisheries Management and Conservation Programmes	15.5	15.5			14.8	14.8		

Japan

Category of Subsidy	Combined #s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #s	Total #s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #s
Direct Assistance to Fishers and Fisheries Workers								
Lending Support Programmes	23.1	23.1			26	26	26	
Tax Preferences and Insurance Support Programmes	1.2	1.2			4,990	1.3	4,990	
Capital and Infrastructure Support Programmes	2165-2186	2186		2,165	2,623.9	2,623.9		
Marketing and Price Support Programmes								
Fisheries Management and Conservation Programmes	735.5	735.5			533	533.0		

Korea

Category of Subsidy	Combined #s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #s	Total #s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #s
Direct Assistance to Fishers and Fisheries Workers								
Lending Support Programmes	106.5	106.5	41.2	351	107	107.4	38.3	
Tax Preferences and Insurance Support Programmes	3.5 - 14.7	3.5	11.6		2.8	2.8		
Capital and Infrastructure Support Programmes	164	164			175	175		
Marketing and Price Support Programmes	16.6	16.6			31.3	31.3		
Fisheries Management and Conservation Programmes	36.4	36.4			28	28		
Unclassified Subsidies	14.1	14.1			23	23		

Malaysia

Category of Subsidy	Combined # 's (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented # 's	Total # 's (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported # 's
Direct Assistance to Fishers and Fisheries Workers								
Lending Support Programmes								
Tax Preferences and Insurance Support Programmes								
Capital and Infrastructure Support Programmes								
Marketing and Price Support Programmes								
Fisheries Management and Conservation Programmes	1.7			1.7	1.7			1.7

Mexico

Category of Subsidy	Combined # 's (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented # 's	Total # 's (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported # 's
Direct Assistance to Fishers and Fisheries Workers								
Lending Support Programmes								
Tax Preferences and Insurance Support Programmes								
Capital and Infrastructure Support Programmes	6.9			6.9				
Marketing and Price Support Programmes								
Fisheries Management and Conservation Programmes	16.8	16.8			14.2	14.2		

Netherlands

Category of Subsidy	Combined # 's (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented # 's	Total # 's (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported # 's
Direct Assistance to Fishers and Fisheries Workers								
Lending Support Programmes								
Tax Preferences and Insurance Support Programmes								
Capital and Infrastructure Support Programmes	3.4	3.4			4.0	4.0		
Marketing and Price Support Programmes								
Fisheries Management and Conservation Programmes	25.6	25.6			29.6	29.6		

New Zealand

Category of Subsidy	Combined #s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #s	Total #s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #s
Direct Assistance to Fishers and Fisheries Workers								
Lending Support Programmes								
Tax Preferences and Insurance Support Programmes								
Capital and Infrastructure Support Programmes								
Marketing and Price Support Programmes								
Fisheries Management and Conservation Programmes	40.3	40.3			37.1	37.1		

Norway

Category of Subsidy	Combined #s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #s	Total #s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #s
Direct Assistance to Fishers and Fisheries Workers	2.8	2.8			3.9	3.9		
Lending Support Programmes	14.1-14.4	14.4	14.1		2.4-14	13.5	2.4	
Tax Preferences and Insurance Support Programmes	34	34			37.3	37.3		
Capital and Infrastructure Support Programmes	8.9-13.6	13.6	7.1		12.6-14.2	10.2	10	
Marketing and Price Support Programmes					0.6		0.6	
Fisheries Management and Conservation Programmes	98.1	98.1	1		107.8	107.8	0.5	

Peru

Category of Subsidy	Combined #s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #s	Total #s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #s
Direct Assistance to Fishers and Fisheries Workers								
Lending Support Programmes	0.9			0.9	0.9			0.9
Tax Preferences and Insurance Support Programmes								
Capital and Infrastructure Support Programmes								
Marketing and Price Support Programmes								
Fisheries Management and Conservation Programmes								

Philippines

Category of Subsidy	Combined #'s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #'s	Total #'s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #'s
Direct Assistance to Fishers and Fisheries Workers								
Lending Support Programmes								
Tax Preferences and Insurance Support Programmes								
Capital and Infrastructure Support Programmes	2.2			2.2	2.2			2.2
Marketing and Price Support Programmes								
Fisheries Management and Conservation Programmes								

Poland

Category of Subsidy	Combined #'s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #'s	Total #'s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #'s
Direct Assistance to Fishers and Fisheries Workers								
Lending Support Programmes								
Tax Preferences and Insurance Support Programmes								
Capital and Infrastructure Support Programmes								
Marketing and Price Support Programmes								
Fisheries Management and Conservation Programmes	7.9	7.9			8.1	8.1		

Portugal

Category of Subsidy	Combined #'s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #'s	Total #'s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #'s
Direct Assistance to Fishers and Fisheries Workers	2	2	0.02					
Lending Support Programmes	6.6		6.6					
Tax Preferences and Insurance Support Programmes								
Capital and Infrastructure Support Programmes	4.1	4.1			7.0	7.0		
Marketing and Price Support Programmes								
Fisheries Management and Conservation Programmes	25.4	25.4			22.9	22.9		
Unclassified Subsidies	0.14	0.14			0.15	0.15		

Russia

Category of Subsidy	Combined # 's (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented # 's	Total # 's (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported # 's
Direct Assistance to Fishers and Fisheries Workers								
Lending Support Programmes								
Tax Preferences and Insurance Support Programmes								
Capital and Infrastructure Support Programmes	633			633	633.0			633
Marketing and Price Support Programmes								
Fisheries Management and Conservation Programmes								

Spain

Category of Subsidy	Combined # 's (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented # 's	Total # 's (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported # 's
Direct Assistance to Fishers and Fisheries Workers	51.8-54.9	8.6	51.5		7.3-8.7	8.4	7.3	
Lending Support Programmes								
Tax Preferences and Insurance Support Programmes								
Capital and Infrastructure Support Programmes	26.7-34.3	34.3	21.1		63-65	27.3	63.5	
Marketing and Price Support Programmes								
Fisheries Management and Conservation Programmes	86.6	86.1	0.5		68	68.1		

Sweden

Category of Subsidy	Combined # 's (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented # 's	Total # 's (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported # 's
Direct Assistance to Fishers and Fisheries Workers	4.1	4.1	0.8		6.2	5.6	1.1	
Lending Support Programmes								
Tax Preferences and Insurance Support Programmes								
Capital and Infrastructure Support Programmes	0.9-1.0	1	0.9		2.4	2.2	2.4	
Marketing and Price Support Programmes	0.2		0.2		3.0	2.0	3.0	
Fisheries Management and Conservation Programmes	37.6-38.3	37.6	2		38.8	36.9	4.4	

Chinese Taipei

Category of Subsidy	Combined #'s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #'s	Total #'s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #'s
Direct Assistance to Fishers and Fisheries Workers								
Lending Support Programmes								
Tax Preferences and Insurance Support Programmes	6.3			6.3	6.3			6.3
Capital and Infrastructure Support Programmes	154.3			154.3	80.3			80.3
Marketing and Price Support Programmes	4.9			4.9	4.9			4.9
Fisheries Management and Conservation Programmes	22.2			22.2	22.2			22.2

Thailand

Category of Subsidy	Combined #'s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #'s	Total #'s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #'s
Direct Assistance to Fishers and Fisheries Workers								
Lending Support Programmes								
Tax Preferences and Insurance Support Programmes	2.8			2.8	2.8			2.8
Capital and Infrastructure Support Programmes								
Marketing and Price Support Programmes								
Fisheries Management and Conservation Programmes	0.3			0.3	0.3			0.3

Turkey

Category of Subsidy	Combined #'s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #'s	Total #'s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #'s
Direct Assistance to Fishers and Fisheries Workers								
Lending Support Programmes	1.1	1.1			0.4	0.4		
Tax Preferences and Insurance Support Programmes								
Capital and Infrastructure Support Programmes	27.5	27.5			28.2	28.2		
Marketing and Price Support Programmes								
Fisheries Management and Conservation Programmes								

United Kingdom

Category of Subsidy	Combined #s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #s	Total #s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #s
Direct Assistance to Fishers and Fisheries Workers								
Lending Support Programmes	0.08		0.08		0.08		0.08	
Tax Preferences and Insurance Support Programmes								
Capital and Infrastructure Support Programmes	10.7-10.8	10.8	0.7		10.3-11.7	11.7	1.2	
Marketing and Price Support Programmes								
Fisheries Management and Conservation Programmes	88.2	88.2			81.6	81.6		

United States

Category of Subsidy	Combined #s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #s	Total #s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #s
Direct Assistance to Fishers and Fisheries Workers								
Lending Support Programmes	2.5			2.5	2.5			2.5
Tax Preferences and Insurance Support Programmes	150	150		150	150	150		150
Capital and Infrastructure Support Programmes	30.6	30.6			41.5	41.5		
Marketing and Price Support Programmes	17.8	17.8			9.9	9.9		
Fisheries Management and Conservation Programmes	667	664.6		5.5	655-658	655.4		5.5

Vietnam

Category of Subsidy	Combined #s (US\$ M)	OECD 97 (US\$ M)	1997 WTO Not.'s (US\$ M)	APEC 97 (US\$ M) Documented #s	Total #s (US\$ M)	OECD 96 (US\$ M)	1996 WTO Not.'s (US\$ M)	APEC 96 (US\$ M) Reported #s
Direct Assistance to Fisher and Fisheries Workers								
Lending Support Programmes	30.7			30.7	30.7			30.7
Tax Preferences and Insurance Support Programmes								
Capital and Infrastructure Support Programmes	4.6			4.6	4.6			4.6
Marketing and Price Support Programmes								
Fisheries Management and Conservation Programmes								

Appendix II: Country-by-Country Listing of Total Reported Subsidies Programmes: 1996

Australia

Category	Type of Subsidy	WTO		OECD (source: OECD, pg 163) (US\$ M)		APEC		APEC Source
Tax Preferences and Insurance Support Programmes	Fuel Tax Exemption			Fuel Tax Exemption	7.8			
Fisheries Management and Conservation Programmes	Fisheries Management Programmes			Management Costs	6.5			
	R & D - to develop new fisheries technologies			Research Costs	1.6			

Belgium

Category	Type of Subsidy	WTO		OECD (source: OECD, pg 164) (US\$ M)		APEC		APEC Source
Capital and Infrastructure Support Programmes	Fleet Renewal and Modernization			Grants and subsidized loans for new vessel construction	0.96			
				Subsidies for the modernization of fishing vessels	0.31			
				Regional development grants	0.04			
Capital and Infrastructure Support Programmes	Fishing Port Infrastructure Enhancement			Fishing port facilities	0.03			
Direct Assistance to Fishers and Fisheries Workers	Income Support Programmes			Fixed salaries for apprentices	0.13			
Fisheries Management and Conservation Programmes	Fisheries Enforcement Programmes			Enforcement expenditures	0.15			
	R & D - to develop new fisheries technologies			Research expenditures	1.3			
Unclassified Subsidies				Unclassified support	0.04			

Canada

Category	Type of Subsidy	WTO (G/SCM/25/CAN) (US\$ M)		OECD (source: OECD pg 164) (US\$ M)		APEC (source: Appendix A, pg. 2) (US\$ M)		APEC Source	
Direct Assistance to Fishers and Fisheries Workers	Income Support Programmes			Income support to displaced fishers	93.3				
	Unemployment Insurance			<i>Fishers unemployment insurance (special income support provided to self-employed fishers and wage earning fishers)</i>	141.7	<i>Fishers Unemployment Insurance</i>	132	Dept. of Fisheries & Oceans	
	Other Direct Payments to Fishers				Active participation measures	16.3			
					Federal regional assistance	9.75			
	Tax Preferences and Insurance Support	Vessel Insurance or Reinsurance			Vessel insurance plan	0.88			
Lending Support Programmes	Loan Guarantees			Loan guarantees (provided by private lenders and guaranteed by the Gov. under the Small Business Loans Act)	5.35				
Capital and Infrastructure Support Programmes	Bait Services - Provided to Fishers			Bait services	0.95				
	Fishing Port Infrastructure Enhancement			<i>Harbor facilities</i>	34.75	<i>Small Craft Harbors Programme - administration and maintenance of commercial and recreational fishing harbors</i>	32.1	Dept. of Fisheries & Oceans	
Fisheries Management and Conservation Programmes	Worker Adjustment Programmes	<i>Fisheries Alternative Programmeme</i>	6.1	<i>Older workers adjustment programmes</i>	7.8	TAGS (Atlantic Groundfish Strategy) - Income support for displaced fishers due to groundfish crisis to find alternative employment	217.6	Dept. of Fisheries & Oceans	

Canada

Category	Type of Subsidy	WTO (G/SCM/25/CAN) (US\$ M)		OECD (source: OECD pg 164) (US\$ M)		APEC (source: Appendix A, pg. 2) (US\$ M)		APEC Source	
Fisheries Management and Conservation Programmes	Fisheries Management Programmes			<i>Fisheries management</i>	68.8	<i>Fisheries Management and Conservation Programmes</i>	30	Dept. of Fisheries & Oceans	
	R & D - to develop new fisheries technologies			<i>Fisheries research</i>	48.9	<i>Research & Stock Assessment</i>	57.7	Dept. of Fisheries & Oceans	
							Regional Economic Development-R&D to develop new fisheries technologies	14.6	Dept. of Fisheries & Oceans
				<i>License retirement in the Atlantic groundfishery</i>	22.5	<i>TAGS Early Retirement Programmes</i>	12.7	Dept. of Fisheries & Oceans	
	Permit Buybacks or License Retirement			<i>License retirement in the Pacific Salmon fishery</i>	57.6	<i>PRSR - Pacific Salmon Revitalization Strategy - License retirement in the Pacific salmon fishery</i>	72.8	Dept. of Fisheries & Oceans	
	Fisheries Enforcement Programmes					<i>Fisheries Enforcement Programmes</i>	52.5	Dept. of Fisheries & Oceans	
	Fisher Retraining					<i>TAGS and PSRS-Pacific Salmon Revitalization Strategy-retraining to assist fishers to find alternative employment, buybacks</i>	24.4	Dept. of Fisheries & Oceans	

China

Category	Type of Subsidy	WTO		OECD		APEC (source: Appendix A, pg. 19) (US\$ M)		APEC Source
Capital and Infrastructure Support Programmes	Fishing Port Infrastructure Enhancement					Guandong Province Fishing Ports Financing Programme	6.5	Complete Collections - China's Fisheries Laws & Regulations
						Chinese Central Gov. Fishing Port Construction Fund	43.75	

Denmark*

Category	Type of Subsidy	WTO (G/SCM/N/25/EEC) (US\$ M)		OECD (source: OECD pg 165) (US\$ M)		APEC		APEC Source
Direct Assistance to Fishers and Fisheries Workers	Other Direct Payments to Fishers	<i>Aid for consultants</i>	0.3	<i>Aid for consultants</i>	0.4			
		Support to fishing from beaches in Western Jutland	0.02					
Capital and Infrastructure Support Programmes	Fishing Port Infrastructure Enhancement	<i>Modernization of fishing port facilities</i>	1.85	<i>Fishing port facilities</i>	1.15			
	Fleet Renewal and Modernization	Modernization of fishing vessels	0.9					
Fisheries Management and Conservation Programmes	Vessel Buybacks	<i>Decommissioning</i>	6.05	<i>Grants for permanent cessation</i>	6.05			
	Fisheries Management Programmes			Management expenditure	8.1			
	Fisheries Enforcement Programmes			Enforcement expenditure	15.5			
	R & D - to develop new fisheries technologies			Research expenditure	31			
	Permit Buybacks or License Retirement	<i>Grants for retirement of fishers</i>	0.12	<i>Grants for retirement of fishers</i>	0.12			
	Other Fisheries Management and Conservation Programmes	<i>PESCA grants</i>	0.05	<i>PESCA grants</i>	0.05			
					Protection of marine areas	0.3		
Unclassified Subsidies				Unclassified transfers	1.5			

*Danish notifications are difficult to discern because subsidy amounts are presented in a table that list two different numbers for each year. Amounts were selected based on cross-checking with OECD numbers for identical subsidies.

European Union

Category	Type of Subsidy	WTO (G/SCM/N/16/EEC) (US\$ M)		OECD (source: OECD pg 180) (US\$ M)		APEC		APEC Source
Capital and Infrastructure Support Programs	Development Grants - for fisheries enterprises	<i>Financial Instrument for Fisheries Guidance*</i>	576.9	<i>Financial Instrument for Fisheries Guidance</i>	524			
				support for artisanal and small-scale coastal fishing (structural operations)	1.2			
		Foreign Access Payments		Payments for access to 3rd country waters (Intrntl. Agreemnts)	312			
Marketing and Price Support Programs	Other Marketing and Price Support Programs			compensation for cephalopod producers in the canary islands	0.07			
	Fish Product Promotion Programs			compensation for additional marketing costs from remote regions	11			
		Market interventions for fishery products**	32.4					
	Market Price Support	<i>Common organization of markets through financial compensation, carry-over aid, autonomous withdrawal and carry-over, private storage aid, compensatory payment for tuna supplied to industry</i>	38.5	<i>Intervention for fisheries products (includes flat-rate aid for certain fish products, compensation for tuna delivered to EU canning plants, private storage aid, and other expenditures associated with market interventions to stabilize and support fish prices</i>	31.4			
Fisheries Management and Conservation Programs	Other Fisheries Management and Conservation Programs			PESCA	21			
	Fisheries Enforcement Programs			Inspection and surveillance	20.1			
	Fisheries Management Programs			Support for producers' organizations (mgt. research, conserv.)	10.9			

*Amount includes initiatives under PESCA

**Includes only EU measures on internal markets, the notification (G/SCM/N/38/EEC) also includes subsidy interventions for fishery product exports, but it was difficult to determine the subsidy amounts from the information provided.

Finland

Category	Type of Subsidy	WTO		OECD (source: OECD pg 166) (US\$ M)		APEC		APEC Source	
Capital and Infrastructure Support Programs	Fleet Renewal and Modernization			Payments for renewal and modernization of the fleet	0.4				
	Fishing Port Infrastructure Enhancement			Fishing port facilities	0.2				
Direct Assistance to Fishers and Fisheries Workers	Unemployment			Insurance	1.37				
	Other Direct Payments to Fishers			Compansations to salmon fishers for damage to the fishery caused by seals	0.04				
				Transport subsidies	0.78				
Lending Support Programs	Subsidized loans			Interest rebates	0.02				
Fisheries Management and Conservation Programs	R & D - to develop new fisheries technologies			Research expenditure	16.3				
	Fisheries Management Programs			Management expenditure	4.5				
	Fisheries Enforcement Programs			Enforcement expenditure	2				
	Vessel Buybacks				Payments for the permanent decommissioning of fishing vessels	0.68			
					Protection of marine areas	0.13			
		Other Fisheries Management and Conservation Programs			Compensations for introducing closed seasons in salmon fishery	0.83			
Unclassified Subsidies				Unclassified transfers	0.07				

France

Category	Type of Subsidy	WTO		OECD (source: OECD pg 167) (US\$ M)		APEC		APEC Source
Direct Assistance to Fishers and Fisheries Workers	Income Support			Temporary stoppage of fishing (allowances for partial employments)	4.5			
Capital and Infrastructure Support Programs	Fleet Renewal and Modernization			Renewal and modernization of fishing fleet	6.5			
	Fishing Port Infrastructure Enhancement			Fishing port facilities	3			
Fisheries Management and Conservation Programs	R & D - to develop new fisheries technologies			Fisheries research	68			
	Fisheries Management Programs			Management and enforcement	14.5			
	Worker Adjustment Programs			Adjustment of fishing effort	2.7			
Unclassified Subsidies				Unclassified transfers	8.7			

Germany

Category	Type of Subsidy	WTO		OECD (source: OECD pg 168) (US\$ M)		APEC		APEC Source
Capital and Infrastructure Support Programmes	Fleet Renewal and Modernization			Grants for the purchase of new fishing vessels	1.6			
				Grants for the purchase of second hand cutters	0.3			
				Grants for the modernization of fishing vessels	1.1			
	Fishing Port Infrastructure Enhancement			Fishing port facilities	1.9			
Direct Assistance to Fishers and Fisheries Workers	Income Support Programmes			Payments for the temporary withdrawal of fishing vessels	7			
Lending Support Programmes	Subsidized loans			Loans to cutter fisheries	3.1			
				Support to reduce the costs of capital (interest subsidies)	0.7			
Fisheries Management and Conservation Programmes	R & D - to develop new fisheries technologies			Fisheries Research	22.3			
	Fisheries Management Programmes			Fisheries Management	5.3			
	Fisheries Enforcement Programmes			Enforcement	23.9			
	Vessel Buybacks			Payments for the permanent withdrawal of fishing vessels	0.7			
	Other Fisheries Management and Conservation Programmes			Protection of marine areas	0.1			
Unclassified Subsidies				Unclassified transfers	0.3			

Greece

Category	Type of Subsidy	WTO		OECD (source: OECD pg 169) (US\$ M)		APEC		APEC Source
Capital and Infrastructure Support Programmes	Fleet Renewal and Modernization			Grants for renewal and modernization of the fleet	1.2			
	Fishing Port Infrastructure Enhancement			Fishing port facilities	0.4			
Fisheries Management and Conservation Programmes	Fisheries Management Programmes			Management expenditure	5			
	Fisheries Enforcement Programmes			Enforcement expenditure	26.7			
	R & D - to develop new fisheries technologies			Research expenditure	7.3			
	Worker Adjustment Programmes			Grants for adjustment of fishing effort	2.7			
	Other Fisheries Management and Conservation Programmes			Protection of marine areas	0.1			
Unclassified Subsidies				Unclassified transfers	0.2			

Hong Kong

Category	Type of Subsidy	WTO		OECD		APEC (source: Appendix A, pg. 28) (US\$ M)		APEC Source
Fisheries Management and Conservation Programmes	Other Fisheries Management and Conservation Programmes					Artificial Reef Project	12.8	Ag. & Fish. Dept.

Iceland

Category	Type of Subsidy	WTO		OECD (source: OECD pg 169) (US\$ M)		APEC		APEC Source
Tax Preferences and Insurance Support Programmes	Income Tax Deferrals			Income tax deduction for fishers	21.9			
Fisheries Management and Conservation Programmes	Fisheries Management Programmes			Management costs	1.7			
	Fisheries Enforcement Programmes			Coast guard	8.4			
	R & D - to develop new fisheries technologies			Fisheries research costs	9.3			

Indonesia

Category	Type of Subsidy	WTO		OECD		APEC (Appendix A, pg. 31) (US\$ M)		APEC Source
Capital and Infrastructure Support Programmes	Development Grants - for fisheries enterprises					Integrated Small Scale Fisheries Development	18.5	
Marketing and Price Support Programmes	Fish Product Promotion Programmes					Food diversification and nutrition-increase consumption and broadening of fish consumption	5.8	
	Market Price Support					Farming Business Development Programme-Fish product promotion and market price support	92.4	
Fisheries Management and Conservation Programmes	R & D - to develop new fisheries technologies					Research Institute for Marine Fisheries	46.5	
	Fisheries Management Programmes					Programme for Development of Resources, Equipment, and Machinery-management and conservation programmes	91.2	Interviews

Ireland

Category	Type of Subsidy	WTO (G/SCM/N/25/EEC) (US\$ M)		OECD (source: OECD pg 170) (US\$ M)		APEC		APEC Source
Direct Assistance to Fishers and Fisheries Workers	Other Direct Payments to Fishers			Small Fisheries	0.5			
				Direct Aid	0.3			
Capital and Infrastructure Support Programmes	Fishing Port Infrastructure Enhancement			Grants for fishing port development	2.6			
	Fleet Renewal and Modernization			Renewal and Modernization	0.6			
Tax Preferences and Insurance Support Programmes	Fuel Tax Exemptions							
		<i>Fuel Tax exemptions</i>	2.9	<i>Fuel Tax exemptions</i>	2.9			
Fisheries Management and Conservation Programmes	R & D - to develop new fisheries technologies			Research expenditures	10.2			
	Fisheries Enforcement Programmes			Enforcement expenditures	80			
	Fisheries Management Programmes			Management Expenditures	0.8			
	Vessel Buybacks			Decommissioning	0.3			
Unclassified Subsidies								
				Unclassified transfers	0.08			

Italy

Category	Type of Subsidy	WTO		OECD (source: OECD pg 171) (US\$ M)	APEC		APEC Source
Direct Assistance to Fishers and Fisheries Workers	Income Support Programmes			Support for temporary withdrawal of vessels (eliminated after 97)	38.9		
	Other Direct Payments to Fishers			Support for small fisheries	0.5		
Capital and Infrastructure Support Programmes	Fleet Renewal and Modernization			Modernisation of vessels	2.85		
				Grants for renewal and modernisation of vessels	3.6		
				Provisions for Law no. 72/92 (support for modernization of fishing vessels, mollusc co-operative consortiums)	2.8		
				Renewal of vessels	1.7		
	State Investments - in state-owned fisheries enterprises			Permanent and temporary joint ventures	9.65		
	Fishing Port Infrastructure Enhancement			Fishing port facilities	3.6		
Lending Support Programmes	Subsidized loans			Interest rebates	1.2		
Fisheries Management and Conservation Programmes	Vessel Buybacks			Vessel decommissioning payments	4		
	Fisheries Management Programmes			Management Expenditures	3.3		
	Fisheries Enforcement Programmes			Enforcement expenditures (includes modernization of fishing vessels, as this support was subordinated to naval security enforcement rules)	3.5		
	R & D - to develop new fisheries technologies			Research expenditures	0.3		
	Programmes to Assess Fish Stocks			Support for information collection data expenditure	3.7		

Japan

Category	Type of Subsidy	WTO (G/SCM/N/38/JPN) (US\$ M)		OECD (source: OECD pg 171) (US\$ M)		APEC		APEC Source
Tax Preferences and Insurance Support Programmes	Vessel Insurance or Reinsurance Programmes	<i>Fisheries Trust Fund Subsidy (for insurance for fisheries disasters)</i>	1.3	<i>Re-insurance for damage of fishing vessels and mutual-aid insurance for fisheries disasters</i>	1.3			
	Accelerated Depreciation	Additional Depreciation of Fishing Boats (Tax Deferral)	4,989					
Lending Support Programmes	Subsidized loans	<i>Fisheries Modernization Fund Interest Subsidy</i>	26	<i>Reduction in interest costs for fishing co-operatives</i>	25.7			
Capital and Infrastructure Support Programmes	Fishing Port Infrastructure Enhancement			Support for fisheries and infrastructure, enhancement of fishery communities environment (includes support for construction of fishing ports, artificial reefs, and aquaculture)	2,601			
	Development Grants - for fisheries enterprises			Support for introduction of new vessel and gear (support for improvement of the functioning of production, distribution, processing, and marketing)	22.9			
Fisheries Management and Conservation Programmes				Research and development of new fishery technologies	91.9			
	R & D - to develop new fisheries technologies			Research on deep-sea fisheries resources and the promotion of international fisheries cooperation	147			
	Fisheries Management Programmes			Resource and management costs	266.5			
	Vessel Buybacks			Payments for fleet reduction	27.6			

Korea

Category	Type of Subsidy	WTO (G/SCM/N/38/KOR, G/SCM/N/25/KOR) (US\$ M)		OECD (source: OECD pg 172) (US\$ M)		APEC		APEC Source
Lending Support Programmes	Subsidized loans	Support for Development of Deep-Sea Fishery	5.7	Support for the development of the deep-sea fishery	5.85			
		Support for Antarctic Ocean Development	0.02	Support to enhance fishery resources	68.7			
		Support for Fishing Activities (To support stable fishing business operation by providing loans)	32.6	Support to reduce interest costs	32.8			
Tax Preferences and Insurance Support Programmes	Other Tax Preferences and Insurance Support Programmes			Support for crew insurance	2.2			
	Income Tax Deferrals			Tax exemption for deep-sea vessels	0.6			
Marketing and Price Support Programmes	Market Price Support			Market intervention	31.3			
Capital and Infrastructure Support Programmes	Fishing Port Infrastructure Enhancement			Support to improve fishing ports and promote fishing villages	175			
Fisheries Management and Conservation Programmes	R & D - to develop new fisheries technologies			Fisheries research and development	7.8			
	Vessel Buybacks			Support for decreasing the number of fishing vessels	20.3			
Unclassified Subsidies				Other cost-reducing transfers	23			

Malaysia

Category	Type of Subsidy	WTO		OECD		APEC (source: Appendix A, pg. 43) (US\$ M)		APEC Source
Fisheries Management and Conservation Programmes	R & D - to develop new fisheries technologies					Research & Planning	0.5	Dept. of Fisheries
	Fisheries Management Programmes					Fisheries Management & Development	0.5	
	Other Fisheries Management and Conservation Programmes					Marine Parks or Marine Protected Areas	0.74	

Mexico

Category	Type of Subsidy	WTO		OECD (source: OECD pg 172) (US\$ M)		APEC		APEC Source
Fisheries Management and Conservation Programmes	R & D - to develop new fisheries technologies			Research expenditures	10.6			
	Fisheries Management Programmes			Management expenditures	3.3			
	Fisheries Enforcement Programmes			Enforcement expenditures	0.3			

Netherlands

Category	Type of Subsidy	WTO		OECD (source: OECD pg 173) (US\$ M)		APEC		APEC Source
Capital and Infrastructure Support	Fleet Renewal and Modernization			Grants for renewal and modernization of fishing fleet	0.4			
	Fishing Port Infrastructure Enhancement			Fishing port facilities	3.6			
Fisheries Management and Conservation Programmes	Fisheries Management Programmes			Management expenditures	3.1			
	Fisheries Enforcement Programmes			Enforcement expenditures	5.9			
	R & D - to develop new fisheries technologies			Research expenditures	18.9			
	Worker Adjustment Programmes			Grants for adjustment of fishing effort	1.7			

New Zealand

Category	Type of Subsidy	WTO		OECD (source: OECD pg 173) (US\$ M)		APEC		APEC Source
Fisheries Management and Conservation Programmes	Fisheries Management Programmes			Administration	1.4			
				Fisheries policy advice	4.8			
	Fisheries Enforcement Programmes			Enforcement of fisheries policy	9.6			
				Prosecution of offenses	1.4			
	R & D - to develop new fisheries technologies			Fisheries research	13			
	Other Fisheries Management and Conservation Programmes			Fisheries services	6.9			

Norway

Category	Type of Subsidy	WTO (G/SCM/N/25/NOR) (US\$ M)	OECD (source: OECD pg 174) (US\$ M)	APEC	APEC Source	
	Fleet Renewal and Modernization	Support for the fishing fleet in the Finnmark-region	2.7	Grants for vessel building	0.6	
		Support for specific fisheries (crab, coastal prawn, coastal mackerel, and coastal sprat)	1.1	Price support for the crab, coastal prawn, coastal mackerel, fjord herring, and coastal sprat fisheries	1.1	
	Development Grants - for fisheries enterprises	Aid to development and rationalization in the fishing industry	1.1			
	State Investments - in state-owned enterprises			Support to improve fleet efficiency, for market support, for energy conservation measures, and for joint venture companies in the coastal fleet.	2	
	Bait Services - Provided to Fishers	Support to Long-line Baiting Facilities	0.6	Other cost-reducing support (centers for baiting of long lines, for sealing for measures to improve safety on board vessels)	2.2	
Capital and Infrastructure Support Programmes	Other Capital and Infrastructure Support Programmes	Transport support in order to facilitate implementations of fisheries activities in specific districts	4.5	Reduction in transport costs (support to reduce transport costs to facilitate fisheries activities in certain regions)	4.5	
Direct Assistance to Fishers and Fisheries Workers	Income Support Programmes			Income guarantee compensation, vacation support, unemployment insurance	3.9	

Norway

Category	Type of Subsidy	WTO (G/SCM/N/25/NOR) (US\$ M)	OECD (source: OECD pg 174) (US\$ M)	APEC	APEC Source	
		Modernization of fishing vessels (interest rate and construction loans)	1.9	Interest subsidies and support for building of vessels (transfers through the National Fishery Bank, in the form of interest rate subsidies and construction loan subsidies, to support the modernization of the fleet)	13.5	
Lending Support Programmes	Subsidized loans	Support for fishing vessels for domestic delivery; contract subsidies and contract loan subsidies	0.5			
Market and Price Support Programmes	Fish Product Promotion Programmes	Marketing Funds	0.6			
Tax Preferences and Insurance Support Programmes	Income Tax Deferrals			Tax refunds and exemptions	37.3	
		Support for the formation of management groups in the coastal fleet	0.5	Ministry of Fisheries	3.3	
	Fisheries Management Programmes			Directorate of Fisheries	14.75	
				Membership of international organisations	0.5	
				Institute of Marine Research	14.8	
	R & D - to develop new fisheries technologies			Operations of research vessels	11	
	Vessel Buybacks			Decommissioning	0.3	
Fisheries Management and Conservation Programmes	Fisheries Enforcement Programmes			Coast Guard	63.1	

Peru

Category	Type of Subsidy	WTO		OECD		APEC (source: Appendix A, pg. 65) (US\$ M)		APEC Source
Lending Support Programmes	Loan Guarantees					FONDEPES - loan guarantees for equip. for artisanal vessels, etc.	0.9	Interviews

Philippines

Category	Type of Subsidy	WTO		OECD		APEC (source: Appendix A, pg. 73) (US\$ M)		APEC Source
Capital and Infrastructure Support Programmes	Fishing Port Infrastructure Enhancement					Capital and Infrastructure Support Programme-port improvements for fishing fleets	2.2	Interviews

Poland

Category	Type of Subsidy	WTO		OECD (source: OECD pg 174) (US\$ M)		APEC		APEC Source
Fisheries Management and Conservation Programmes	R & D - to develop new fisheries technologies			Research costs	2.96			
	Fisheries Management Programmes			Management costs	5.2			

Portugal

Category	Type of Subsidy	WTO		OECD (source: OECD pg 175) (US\$ M)		APEC		APEC Source
Capital and Infrastructure Support Programmes	Fishing Port Infrastructure Enhancement			Fishing port facilities	1.9			
	Fleet Renewal and Modernization			Grants for renewal and modernization of the fishing fleet	2.7			
	Other Capital and Infrastructure Support Programmes			Regional aid	0.4			
				Aid for small fisheries	1.9			
Fisheries Management and Conservation Programmes	Fisheries Management Programmes			Management expenditure	10.2			
	Fisheries Enforcement Programmes			Enforcement expenditure	2.5			
	R & D - to develop new fisheries technologies			Research expenditure	10			
	Other Fisheries Management and Conservation Programmes			Protection of Marine Protected Areas	0.15			
Unclassified Subsidies				Unclassified transfers	0.15			

Russia

Category	Type of Subsidy	WTO		OECD		APEC (source: Appendix A, pg. 75) (US\$ M)		APEC Source
Capital and Infrastructure Support Programmes	Fleet Renewal and Modernization					Ryba - Fleet renewal and modernization (scrapping older vessels and replacing them with newer factory trawlers. By 2001, 77% of fishing fleet and 60% of support fleet is to be scrapped or completely rebuilt. Replaced by new factory trawlers from Norway, Germany, and Spain.	633	North Pacific Fishery Management Council, Clarence Pautzke - http://russia.shaps.hawaii.edu/fishing/country/russia/fish-rfe-all.html

Spain

Category	Type of Subsidy	WTO (G/SCM/N/25/EEC)* (US\$ M)	OECD (source: OECD pg 176) (US\$ M)	APEC	APEC Source
Direct Assistance to Fishers and Fisheries Workers	Income Support Programmes	Aid to ship owners for temporary stoppage of fishing (Moroccan fishing zone)	Temporary payments to fishing owners (assistance for temporary cessation of fishing activities paid to vessel owners who were obliged to lay up their vessels in the Moroccan fishing zone)	8.36	
		Aid for the temporary stoppage of activities of fishing vessels		0.25	
Capital and Infrastructure Support Programmes	Fleet Renewal and Modernization	Renovation of the Fishing Fleet (construction and modernization of fishing boats)	Support for new vessel construction	3.8	
			Support for vessel modernization	3.3	
		Structural aid for fleet renovation and modernization in the Canary Islands		0.6	
		Modernization and renovation of the fishing fleet of the Canary Islands and provision of radiocommunication facilities for boats engaged in inshore fishing		0.3	
		Renovation and modernization of the fishing fleet in Galicia		34.7	
	State Investments - in state-owned fisheries enterprises	Establishment of Joint Ventures for the exploitation of fish stocks of the third country to supply EC market	Payments for temporary joint ventures in third country waters	4	
		Temporary business associations in the fishing sector	Payments for permanent joint ventures in third country waters	15.8	

Spain

Category	Type of Subsidy	WTO (G/SCM/N/25/EEC)* (US\$ M)		OECD (source: OECD pg 176) (US\$ M)		APEC		APEC Source	
	Fishing Port Infrastructure Enhancement	Facilities for fishing ports and improved marketing of fish products	1.6	Support for port facilities	0.4				
Fisheries Management and Conservation	Vessel Buybacks	Restructuring of the fleet to encourage a complete end to fishing by certain vessels	28.7	Payments for the permanent withdrawal of fishing vessels	30.2				
		Adjustment of capacity, decommissioning of fishing boats in Galicia	26						
	Fisheries Management Programmes			Management expenditure	18.4				
	Fisheries Enforcement Programmes			Enforcement expenditure	6.65				
	R & D - to develop new fisheries technologies				Exploratory fishing	0.4			
					Other research expenditure	11.9			
	Other Fisheries Management and Conservation Programmes	Aid to promote the planned cessation of activity by the fishing fleet in Valencia in order to restock the fishing grounds		0.01	Artificial reefs	0.25			
Marine reserves					0.25				

*Several subsidies listed in this notification were not included because they grouped fishery and aquaculture subsidies together and it was impossible to distinguish what portion of the aid went specifically to the fish harvesting sector - such as 'Aid to Encourage Activities to Promote and Seek New Markets for Fish and Aquaculture Products', and several others. Also, the subsidy 'Aid to the Malaga Shell-Fishing Fleet' was not included because amounts were given as monthly figures, so the total amount of aid was impossible to determine.

Sweden

Category	Type of Subsidy	WTO (G/SCM/N/25/EEC) (US\$ M)		OECD (source: OECD pg 177) (US\$ M)		APEC		APEC Source
Capital and Infrastructure Support Programmes		<i>Aid for fleet renewal and modernisation of fishing vessels</i>	1.8	<i>Grants for fleet renewal and modernization</i>	1.8			
	Fleet Renewal and Modernization	State aid for damage to fishing gear	0.2					
	Fishing Port Infrastructure Enhancement	<i>Investment aid to fishing port facilities</i>	0.4	<i>Support for fishing port facilities</i>	0.4			
Direct Assistance to Fishers and Fisheries Workers	Income Support Programmes	<i>Aid for temporary cessation of fishing activities</i>	0.5	<i>Grants for temporary cessation of fishing activities</i>	0.5			
	Unemployment Insurance			Unemployment insurance payments	4.8			
	Other Direct Payments to Fishers	Investment for measures undertaken within the Parliament Initiative Action Plan for Small-Scale Coastal Fishing	0.03	Regional aid	0.3			
		Aid to studies and pilot projects to improve and adapt structures in the fisheries and aquaculture sector	0.6					
Marketing and Price Support Programmes	Fish Product Promotion Programmes	Aid for promotion/marketing	0.9					
		State aid to promote fish exports	0.06					
	Market Price Support	<i>Financial compensation to producers' organisations for losses when fish has been withdrawn from the market</i>		<i>Financial compensation to producers' organisations for losses when fish are withdrawn from the market</i>	2			

Sweden

Category	Type of Subsidy	WTO (G/SCM/N/25/EEC) (US\$ M)		OECD (source: OECD pg 177) (US\$ M)		APEC		APEC Source
Fisheries Management and Conservation Programmes	Worker Adjustment Programmes	<i>Aid for adjustment of fishing effort</i>		<i>Grants for adjustment of fishing effort</i>	2			
	R & D - to develop new fisheries technologies	Aid to research and development within the fishery sector	0.1	Research	11.3			
	Fisheries Management Programmes			Management costs	8			
	Fisheries Enforcement Programmes			Enforcement costs	14.3			
	Stock Enhancement Programmes			Aid for fish restocking	0.25			
	Other Fisheries Management and Conservation Programmes	<i>PESCA funds</i>	0.5	<i>PESCA funds</i>	0.5			
	Investment aid for protection of coastal waters		1.8	Protection of marine areas	0.5			

Chinese Taipei

Category	Type of Subsidy	WTO		OECD		APEC (source: Appendix A, pg. 79) (US\$ M)		APEC Source
Tax Preferences and Insurance Support Programmes	Vessel Insurance or Reinsurance Programmes					Marine insurance on fishing vessels and fishermen	6.3	Chinese Taipei Dept. of Fisheries
Marketing and Price Support Programmes	Fish Product Promotion Programmes					Fish Product Promotion Programmes	4.9	
Capital and Infrastructure Programmes	Fishing Port Infrastructure Enhancement					Fishing port infrastructure enhancement	80.3	
Fisheries Management and Conservation Programmes	Stock Enhancement Programmes					Stock Enhancement	4.9	
	Programmes to Assess Fish Stocks					Stock assessment programmes	2.9	
	Fisheries Management Programmes					Fisheries Management	13.4	
		Fisheries Management Programmes					Management of marine recreational fisheries	

Thailand

Category	Type of Subsidy	WTO		OECD		APEC (source: Appendix A, pg. 97) (US\$ M)		APEC Source
Tax Preferences and Insurance Support Programmes	Fuel Tax Exemptions					Diesel Fuel Price Reduction Programme	2.75	Interviews
Fisheries Management and Conservation Programmes	Fisheries Management Programmes					Coral Management Programme	0.28	Enterprise Canada Thailand

Turkey

Category	Type of Subsidy	WTO		OECD (source: OECD pg 177) (US\$ M)	APEC		APEC Source
Capital and Infrastructure Support Programmes	Development Grants - for fisheries enterprises			Development projects (financed through the Ministry of Agriculture and Rural Affairs)	4.8		
	Fishing Port Infrastructure Enhancement			Building fishing harbors (financed by Ministry of Transportation)	23.4		
Lending Support Programmes	Subsidized loans			Interest concessions (concessional loans to the fisheries sector by Turkey's Agricultural Bank)	0.4		

United Kingdom

Category	Type of Subsidy	WTO (G/SCM/N25/EEC) (US\$ M)		OECD (source: OECD pg 178) (US\$ M)		APEC		APEC Source
Capital and Infrastructure Support Programmes	Fleet Renewal and Modernization	Safety Improvements on Fishing Vessels	1.2	Support for vessel modernization (safety equipment)	2.65			
				Support for vessel modernization (conditional that modernization does not increase capacity or effort)	1.2			
	Fishing Port Infrastructure Enhancement			Support for port facilities for fishers	5.3			
				fishing port facilities	2.5			
Lending Support Programmes	Subsidized loans	Highland Opportunity Limited: Fishing Vessel, Fish Processing and Fish Farming Loans (Discretionary reduced interest loans linked to free technical and business advice)	0.08					
Fisheries Management and Conservation Programmes	R & D - to develop new fisheries technologies			research	23.8			
	Fisheries Management Programmes			management	10.8			
	Fisheries Enforcement Programmes			enforcement	39.9			
	Vessel Buybacks			Payments for permanent withdrawal of fishing vessels	7			
	Other Fisheries Management and Conservation Programmes			Support for producers' organisations	0.1			

United States

Category	Type of Subsidy	WTO		OECD (source: OECD pg 179) (US\$ M)	APEC (source: Appendix A, pg. 143) (US\$ M)	APEC Source
Capital and Infrastructure Support Programmes	Fleet Modernization and Renewal			Fishery Finance Programme	0.25	
				Fishing Vessel Gear Damage Programme	1	
				Support the construction and reconstruction of fishing vessels	2.1	
				Fishermen's Contingency Fund	1	
				State Investments - for fisheries enterprises	26.2	
				Fishing Port Infrastructure Enhancement		
				Support for fishing ports	10.9	
Marketing and Price Support Programmes	Fish Product Promotion Programmes			Promotion and development of fisheries (state science and mgt., product quality and seafood inspection programme)	9.9	
Lending Support Programmes	Subsidized Loans					Capital Construction Fund - allows fishermen to accelerate accumulation of funds with which to replace or improve fishing vessels (current total value of fund is 240 million - 2.5 annual in costs of running it)
						NMFS, www.nmfs.gov/sfweb/sf/finasstsummary.htm
Tax Preferences and Insurance Support Programmes	Fuel Tax Exemptions			<i>Diesel and Gasoline Tax Exemption</i>	150	<i>Diesel and gasoline excise tax exemption</i>
					150	WTO (WT/CTE/W/80/Add.1)

United States

Category	Type of Subsidy	WTO		OECD (source: OECD pg 179) (US\$ M)		APEC (source: Appendix A, pg. 143) (US\$ M)		APEC Source
Fisheries Management and Conservation Programmes	R & D - to develop new fisheries technologies			Information collection and analysis (NMFS budget)	156.5	Fisheries Finance Programme (Saltonstall-Kennedy Grant Programme) - fund provides grants for fisheries research and development projects	2.5	NMFS, www.nmfs.gov/sfweb/sf/finasstsummary.htm
				<i>Marine Fisheries Initiative</i>	6	<i>Marine Fisheries Initiative - grants to conduct research</i>		
	Fisheries Management Programmes			Conservation and Management	98.9			
	Fisheries Enforcement Programmes			Enforcement Costs (fisheries enforcement activities by Coast Guard)	400			

Vietnam

Category	Type of Subsidy	WTO		OECD (source: OECD pg 179)		APEC (source: Appendix A, pg. 165) (US\$ M)		APEC Source
Lending Support Programmes	Subsidized loans					Soft Loan Programme - to build and upgrade fishing boats (as a result, high capacity fishing fleet has increased by 5000 pieces creating more than 10,000 new jobs)	30.7	Ministry of Planning & Investment, Ministry of Fisheries
Capital and Infrastructure Support Programmes	Fishing Port Infrastructure Enhancement					Fishing Port Construction	4.6	

Appendix III: Country-by-Country Listing of Total Reported Subsidies Programmes: 1997

Australia

Category	Type of Subsidy	WTO		OECD (source: OECD, pg 163) (US\$ M)		APEC (US\$ M)		APEC Source
Fisheries Management and Conservation Programmes	Permit Buybacks or License Retirement			Support for permanent withdrawal (buyout of fishing permits)	3.3			
	Fisheries Management Programmes			Management Costs	19.4	Fisheries Management Programmes, R & D to develop new technologies, loan guarantees	15.9	OECD
	R & D - to develop new fisheries technologies			Research Costs	9.5			
	Other Fisheries Management and Conservation Programmes			Compensation to fishers who have suffered losses due to the introduction of an ITQ system	1.7			

Belgium

Category	Type of Subsidy	WTO (G/SCM/N/38/EEC/Add.2) (US\$ M)	OECD (source: OECD, pg 164) (US\$ M)	APEC	APEC Source	
Capital and Infrastructure Support Programmes		Grants, loans, and guarantees for new vessel construction*	0.6	Grants and subsidized loans for new vessel construction*	1.3	
	Fleet Renewal and Modernization			Subsidies for the modernization of fishing vessels	0.16	
	Fishing Port Infrastructure Enhancement			Fishing port facilities	0.01	
Direct Assistance to Fishers and Fisheries Workers	Income Support Programmes			Fixed salaries for apprentices	0.08	
	Other Direct Payments to Fishers			Book-keeping premiums	0.01	
Fisheries Management and Conservation Programmes	Vessel Buybacks	Grants, loans, and guarantees for decommissioning	0.5			
	R & D - to develop new fisheries technologies			Support for Nautical Centre	0.2	
					Research expenditures	1.1
	Fisheries Enforcement Programmes			Enforcement expenditures	0.35	
Unclassified Subsidies				Unclassified support	0.03	

*This subsidy could well have been classified under the category for subsidized lending programmes, but since it includes grants as well it was all put in the category for fleet renewal and modernization

Canada

Category	Type of Subsidy	WTO (G/SCM/N/38/CAN) (US\$ M)		OECD (source: OECD pg 164) (US\$ M)		APEC (US\$ M)		APEC Source	
Direct Assistance to Fishers and Fisheries Workers	Income Support Programmes			Income support to displaced fishers	70.7				
	Unemployment Insurance			<i>Fishers unemployment insurance (special income support provided to self- employed fishers and wage earning fishers)</i>	167	<i>Fishers Unemployment Insurance</i>	132	Dept. of Fisheries & Oceans	
				Federal regional assistance	9.1				
	Other Direct Payments to Fishers			Active participation measures	1.5				
Lending Programmes	Loan Guarantees			Loan guarantees (provided by private lenders and guaranteed by the Gov. under the Small Business Loans Act	8.7				
Capital and Infrastructure Support Programmes	Fishing Port Infrastructure Enhancement			<i>Harbor facilities</i>	34.6	<i>Small Craft Harbors Programme-administration and maintenance of commercial and recreational fishing harbors</i>	32.1	Dept. of Fisheries & Oceans	
Fisheries Management and Conservation Programmes		Alternative employment for fishing communities in Coastal Quebec	0.6						
	Worker Adjustment Programmes	<i>Fisheries Alternative Programmeme</i>	1.1	<i>Older workers adjustment programmes</i>	4.5	TAGS (Atlantic Groundfish Strategy) - Income support for displaced fishers due to groundfish crisis to find alternative employment	217.6	Dept. of Fisheries & Oceans	
	Fisheries Management Programmes			<i>Fisheries management</i>	58.4	<i>Fisheries Management and Conservation Programmes</i>	30	Dept. of Fisheries & Oceans	
	Fisheries Management and Conservation Programmes			<i>Fisheries research</i>	40	<i>Research & Stock Assessment</i>	57.7	Dept. of Fisheries & Oceans	
		R & D - to develop new fisheries technologies					Regional Economic Development-R&D to develop new fisheries technologies	14.6	Dept. of Fisheries & Oceans
		Vessel Buybacks			Vessel compensation	4.1			
		Permit Buybacks or License Retirement					TAGS Early Retirement Programmes	12.7	Dept. of Fisheries & Oceans

Canada

Category	Type of Subsidy	WTO (G/SCM/N/38/CAN) (US\$ M)		OECD (source: OECD pg 164) (US\$ M)		APEC (US\$ M)		APEC Source
						PRSR - Pacific Salmon Revitalization Strategy - License retirement in the Pacific salmon fishery	72.8	Dept. of Fisheries & Oceans
	Fisheries Enforcement Programmes					Fisheries Enforcement Programmes	52.5	Dept. of Fisheries & Oceans
	Fisher Retraining					TAGS and PSRS-Pacific Salmon Revitalization Strategy-retraining to assist fishers to find alternative employment, buybacks	24.4	Dept. of Fisheries & Oceans

China

Category	Type of Subsidy	WTO		OECD		APEC (US\$ M)		APEC Source
Capital and Infrastructure Support Programmes	Development Grants - for fishing enterprises					Anhui Province Fishermen Getting-Rich Programme	0.7	Complete Collections-China's Fishery Laws & Regulations
	Fishing Port Infrastructure Enhancement					Fujian Province Fishery Pillar Industry Development Programme-Fishing Port Infrastructure Enhancement	3.75	
						Guandong Province Fishing Ports Financing Programme	6.5	
						Chinese Central Gov. Fishing Port Construction Fund	43.75	

Denmark*

Category	Type of Subsidy	WTO (G/SCM/N/25/EEC, G/SCM/N/38/EEC/Add.2, G/SCM/N/48/EEC/Add.2) (US\$ M)		OECD (source: OECD pg 165) (US\$ M)		APEC		APEC Source	
Direct Assistance to Fishers and Fisheries Workers	Other Direct Payments to Fishers	<i>Aid for consultants</i>	0.37	<i>Aid for consultants</i>	0.4				
		Support to fishing from beaches in Western Jutland	0.02						
Capital and Infrastructure Support Programmes	Fleet Renewal and Modernization	<i>Modernization and construction of fishing vessels</i>		<i>Grants for the modernization of the fishing fleet</i>	1.6				
				<i>Grants for the renewal of the fishing fleet</i>	0.5				
	Fishing Port Infrastructure Enhancement	<i>Modernization of fishing port facilities</i>	0.3	<i>Fishing port facilities</i>	1				
Fisheries Management and Conservation Programmes	Vessel Buybacks	<i>Decommissioning</i>	7.1	<i>Grants for permanent cessation</i>	3.95				
	Worker Adjustment Programmes	<i>Pre-retirement of fishermen</i>	0.1	<i>Grants for retirement of fishers</i>	0.2				
	R & D - to develop new fisheries technologies			Research expenditure	27.2				
	Fisheries Management Programmes			Management expenditure	7.1				
	Fisheries Enforcement Programmes			Enforcement expenditure	13.6				
	Other Fisheries Management and Conservation Programmes			Protection of marine areas	0.3				
		<i>PESCA grants</i>	0.4	<i>PESCA grants</i>	1.8				
Unclassified Subsidies				Unclassified transfers	1.3				

*Danish notifications are difficult to discern because subsidy amounts are presented in a table that list two different numbers for each year. Amounts were selected based on cross-checking with OECD numbers for identical subsidies.

European Union

Category	Type of Subsidy	WTO (G/SCM/N/38/EEC) (US\$ M)		OECD (source: OECD pg 180) (US\$ M)		APEC		APEC Source
Capital and Infrastructure Support Programmes		<i>Financial Instrument for Fisheries Guidance*</i>	623.6	<i>Financial Instrument for Fisheries Guidance</i>	406			
	Development Grants - for fisheries enterprises			support for artisanal and small-scale coastal fishing (structural operations)	2.2			
	Foreign Access Payments			Payments for access to 3rd country waters (Intrntl. Agreements)	238.8			
Marketing and Price Support Programmes	Fish Product Promotion Programmes			compensation for additional marketing costs from remote regions	10.7			
		Market interventions for fishery products**	25.2					
	Market Price Supports	<i>Common organisation of markets through financial compensation, carry-over aid, autonomous withdrawal and carry-over, private storage aid, compensatory payment for tuna supplied to industry</i>	34.6	<i>Intervention for fisheries products (includes flat-rate aid for certain fish products, compensation for tuna delivered to EU canning plants, private storage aid, and other expenditures associated with market interventions to stabilize and support fish prices</i>	36.5			
Fisheries Management and Conservation Programmes	Fisheries Management Programmes			Support for producers' organisations (mgt. research, conserv.)	21.6			
	R & D - to develop new fisheries technologies			research and technical assistance	19.4			
	Fisheries Enforcement Programmes			Inspection and surveillance	39.7			
	Other Fisheries Management and Conservation Programmes			PESCA	1.65			

*Amount includes initiatives under PESCA

**Includes only EU measures on internal markets, the notification (G/SCM/N/38/EEC) also includes subsidy interventions for fishery product exports, but it was difficult to determine the subsidy amounts from the information provided.

Finland

Category	Type of Subsidy	WTO		OECD (source: OECD pg 166) (US\$ M)		APEC		APEC Source
Capital and Infrastructure Support Programmes	Fleet Renewal and Modernization			Payments for renewal and modernization of the fleet	0.4			
	Fishing Port Infrastructure Enhancement			Fishing port facilities	0.2			
Direct Assistance to Fishers and Fisheries Workers	Unemployment Insurance			Insurance	1.6			
	Other Direct Payments to Fishers			Transport subsidies	0.6			
				Compensations for introducing closed seasons in salmon fishery	0.8			
				Compansations to salmon fishers for damage to the fishery caused by seals	0.04			
Lending Support Programmes	Subsidized Loans			Interest rebates	0.004			
Fisheries Management and Conservation Programmes	Vessel Buybacks			Payments for the permanent decommissioning of fishing vessels	0.6			
	R & D - to develop new fisheries technologies			Research expenditure	14.5			
	Fisheries Management Programmes			Management expenditure	4			
	Fisheries Enforcement Programmes			Enforcement expenditure	1.7			
	Other Fisheries Management and Conservation Programmes			Protection of marine areas	0.1			

France

Category	Type of Subsidy	WTO		OECD (source: OECD pg 167) (US\$ M)		APEC		APEC Source
Direct Assistance to Fishers and Fisheries Workers	Income Support Programmes			Temporary stoppage of fishing (allowances for partial employments)	3.9			
Capital and Infrastructure Support Programmes	Fleet Renewal and Modernization			Renewal and modernization of fishing fleet	5.7			
	Fishing Port Infrastructure Enhancement			Fishing port facilities	2.65			
Lending Support Programmes	Subsidized loans			Interest rebates	13.5			
Fisheries Management and Conservation Programmes	Worker Adjustment Programmes			Adjustment of fishing effort	2.3			
	R & D - to develop new fisheries technologies			Fisheries research	59.6			
	Fisheries Management Programmes			Management and enforcement	12.7			
Unclassified Subsidies				Unclassified transfers	7.6			

Germany

Category	Type of Subsidy	WTO		OECD (source: OECD pg 168) (US\$ M)		APEC		APEC Source
Capital and Infrastructure Support Programmes	Fleet Renewal and Modernization			Grants for the purchase of new fishing vessels	0.06			
				Grants for the purchase of second hand cutters	0.35			
				Grants for the modernization of fishing vessels	0.8			
	Fishing Port Infrastructure Enhancement			Fishing port facilities	1.7			
Lending Support Programmes	Subsidized loans			Loans to cutter fisheries	2.2			
				Support to reduce the costs of capital (interest subsidies)	0.5			
Fisheries Management and Conservation Programmes	R & D - to develop new fisheries technologies			Fisheries Research	19.3			
	Fisheries Management Programmes			Fisheries Management	4.6			
	Fisheries Enforcement Programmes			Enforcement	20.8			
	Other Fisheries Management and Conservation Programmes			Protection of marine areas	0.1			
Unclassified Subsidies				Unclassified transfers	0.2			

Greece

Category	Type of Subsidy	WTO		OECD (source: OECD pg 169) (US\$ M)		APEC		APEC Source
Capital and Infrastructure Support Programmes	Fleet Renewal and Modernization			Grants for renewal and modernization of the fleet	1.1			
	Fishing Port Infrastructure Enhancement			Fishing port facilities	0.4			
Fisheries Management and Conservation Programmes	Fisheries Management Programmes			Management expenditure	4.4			
	Fisheries Enforcement Programmes			Enforcement expenditure	23.5			
	R & D - to develop new fisheries technologies			Research expenditure	6.5			
	Worker Adjustment Programmes			Grants for adjustment of fishing effort	2.4			
	Other Fisheries Management and Conservation Programmes			Protection of marine areas	0.1			
Unclassified Subsidies				Unclassified transfers	0.2			

Hong Kong

Category	Type of Subsidy	WTO		OECD		APEC (US\$ M)		APEC Source
Fisheries Management and Conservation Programmes	Other Fisheries Management and Conservation Programmes					Artificial Reef Project	12.8	Ag. & Fish. Dept.

Iceland

Category	Type of Subsidy	WTO		OECD (source: OECD pg 169) (US\$ M)		APEC		APEC Source
Tax Preferences and Insurance Support Programmes	Income Tax Deferrals			Income tax deduction for fishers	18			
Fisheries Management and Conservation Programmes	Fisheries Management Programmes			Management costs	1.2			
	Fisheries Enforcement Programmes			Coast guard	7.6			
	R & D - to develop new fisheries technologies			Fisheries research costs	9.4			

Indonesia

Category	Type of Subsidy	WTO		OECD		APEC (US\$ M)		APEC Source
Capital and Infrastructure Support Programmes	Development Grants - for fisheries enterprises					Integrated Small Scale Fisheries Development	18.5	
Marketing and Price Support Programmes	Fish Product Promotion Programmes					Food diversification and nutrition-increase consumption and broadening of fish consumption	5.8	
						Farming Business Development Programme- Fish product promotion and market price support	92.4	
	Market Price Support							
Fisheries Management and Conservation Programmes	R & D - to develop new fisheries technologies					Research Institute for Marine Fisheries	46.5	
	Fisheries Management Programmes					Programme for Development of Resources, Equipment, and Machinery-management and conservation programmes	91.2	

Ireland

Category	Type of Subsidy	WTO (G/SCM/N/25/EEC, G/SCM/N/38/EEC/Add.8) (US\$ M)	OECD (source: OECD pg 170) (US\$ M)	APEC	APEC Source
Direct Assistance to Fishers and Fisheries Workers	Other Direct Payments to Fishers		Small Fisheries	0.5	
Tax Preferences and Insurance Support Programmes	Fuel Tax Exemptions	<i>Sea Fishing – Repayment of hydrocarbon oil LPG excise duty in the case of Sea fishing (excise duty relief)</i>	2.7 Fuel Tax exemptions	2.7	
Capital and Infrastructure Support Programmes	Fleet Renewal and Modernization		Renewal and Modernization	0.6	
	Fishing Port Infrastructure Enhancement		Grants for fishing port development	2.4	
Fisheries Management and Conservation Programmes	R & D - to develop new fisheries technologies		Research expenditures	9.7	
	Fisheries Enforcement Programmes		Enforcement expenditures	75.8	
	Fisheries Management Programmes		Management Expenditures	0.75	
	Vessel Buybacks		Decommissioning	0.3	
Unclassified Subsidies			Unclassified Transfers	0.08	

Italy

Category	Type of Subsidy	WTO		OECD (source: OECD pg 171) (US\$ M)		APEC		APEC Source
Capital and Infrastructure Support Programmes	Fleet Renewal and Modernization			Grants for renewal and modernisation of vessels	3.4			
				Provisions for Law no. 72/92 (support for modernization of fishing vessels, mollusc co-operative consortiums)	2.3			
				Renewal of vessels	0.9			
	Fishing Port Infrastructure Enhancement			Fishing port facilities	0.65			
	State Investments - in state-owned fisheries enterprises			Permanent and temporary joint ventures	4.2			
Direct Assistance to Fishers and Fisheries Workers	Income Support Programmes			Support for temporary withdrawal of vessels (eliminated after 97)	0.08			
	Other Direct Payments to Fishers			Provisions for Law no. 72/92 (grants to small-scale fisheries?)	35.2			
				Support for small fisheries	0.96			
Lending Support Programmes	Subsidized loans			Interest rebates	1.2			
Fisheries Management and Conservation Programmes	Vessel Buybacks			Vessel decommissioning payments	4			
				Research expenditures	5			
	R & D - to develop new fisheries technologies			Support for information collection data expenditure	0.9			
	Fisheries Management Programmes			Management Expenditures	3.2			
	Fisheries Enforcement Programmes				Enforcement expenditures (includes modernization of fishing vessels, as this support was subordinated to naval security enforcement rules)	2.2		
				Enforcement of marine protected areas	0.2			

Japan

Category	Type of Subsidy	WTO		OECD (source: OECD pg 171) (US\$ M)	APEC (US\$ M)		APEC Source
Tax Preferences and Insurance Support Programmes	Vessel Insurance or Reinsurance Programmes			Re-insurance for damage of fishing vessels and mutual-aid insurance for fisheries disasters	1.2		
Lending Support Programmes	Subsidized Loans			Reduction in interest costs for fishing co-operatives	23.1		
	Development Grants - for fisheries enterprises			Support for introduction of new vessel and gear (support for improvement of the functioning of production, distribution, processing, and marketing)	20.7		
Capital and Infrastructure Support Programmes	Fishing Port Infrastructure Enhancement			<i>Support for fisheries and infrastructure, enhancement of fishery communities environment (includes support for construction of fishing ports, artificial reefs, and aquaculture)</i>	2,165	<i>Support for fisheries and infrastructure, enhancement of fishery communities environment (includes support for construction of fishing ports, artificial reefs, and aquaculture)</i>	2,165 OECD
				Research and development of new fishery technologies	82.6		
	R & D - to develop new fisheries technologies			Research on deep-sea fisheries resources and the promotion of international fisheries cooperation	115.7		
	Fisheries Management Programmes			Resource and management costs	512.4		
Fisheries Management and Conservation Programmes	Vessel Buyback Programmes			Payments for fleet reduction	24.8		

Korea

Category	Type of Subsidy	WTO (G/SCM/N/38/KOR, G/SCM/N/48/KOR) (US\$ M)	OECD (source: OECD pg 172) (US\$ M)	APEC (US\$ M)	APEC Source	
Lending Support Programmes	Subsidized Loans	Support for Development of Deep-Sea Fishery	9.5	Support for the development of the deep-sea fishery	9.5	Total government financial transfers associated with Korea's fisheries policies, normally provided as low-interest loans
		Support for Antarctic Ocean Development	0.02	Support to enhance fishery resources	65.5	
		Support for Fishing Activities (To support stable fishing business operation by providing loans)	31.7	Support to reduce interest costs	31.5	
Tax Preferences and Insurance Support Programmes	Income Tax Deferrals	Local Tax Reduction for Building and Acquisition of International Line Vessels (deep sea fishing)	11.6	Tax exemption for deep-sea vessels	0.4	OECD
	Other Tax Preferences and Insurance Support Programmes			Support for crew insurance	3.1	
Marketing and Price Support Programmes	Market Price Support			Market intervention	16.6	
Capital and Infrastructure Support Programmes	Fishing Port Infrastructure Enhancement			Support to improve fishing ports and promote fishing villages	164	
Fisheries Management and Conservation Programmes	R & D - to develop new fisheries technologies			Fisheries research and development	5.2	
	Fisheries Management Programmes			Support for improving management of co-operatives	1.3	
	Vessel Buybacks			Support for decreasing the number of fishing vessels	29.9	
Unclassified Subsidies				Other cost-reducing transfers	14.1	

Malaysia

Category	Type of Subsidy	WTO		OECD (source: OECD pg 171)		APEC (US\$ M)		APEC Source
Fisheries Management and Conservation Programmes	R & D - to develop new fisheries technologies					Research & Planning	0.5	Dept. of Fisheries
	Fisheries Management Programmes					Fisheries Management & Development	0.5	
	Other Fisheries Management and Conservation Programmes					Marine Parks or Marine Protected Areas	0.74	

Mexico

Category	Type of Subsidy	WTO		OECD (source: OECD pg 172) (US\$ M)		APEC (US\$ M)		APEC Source
Capital and Infrastructure Support Programmes	Fleet Modernization and Renewal					Fishing Fleet Modernization Programme-rehabilitation of 102 vessels and introduction of 20 new units	6.9	OECD
Fisheries Management and Conservation Programmes	R & D - to develop new fisheries technologies			Research expenditures	10.8			
	Fisheries Management Programmes			Management expenditures	5.4			
	Fisheries Enforcement Programmes			Enforcement expenditures	0.6			

Netherlands

Category	Type of Subsidy	WTO		OECD (source: OECD pg 173) (US\$ M)		APEC		APEC Source
Capital and Infrastructure Support Programmes	Fleet Renewal and Modernization			Grants for renewal and modernization of fishing fleet	0.34			
	Fishing Port Infrastructure Enhancement			Fishing port facilities	3.1			
Fisheries Management and Conservation Programmes	Fisheries Management Programmes			Management expenditures	2.7			
	Fisheries Enforcement Programmes			Enforcement expenditures	5.1			
	R & D - for new fisheries technologies			Research expenditures	16.4			
	Worker Adjustment Programmes			Grants for adjustment of fishing effort	1.4			

New Zealand

Category	Type of Subsidy	WTO		OECD (source: OECD pg 173) (US\$ M)		APEC		APEC Source
Fisheries Management and Conservation Programmes	Fisheries Management Programmes			Administration	2			
				Fisheries policy advice	7.3			
	Fisheries Enforcement Programmes			Enforcement of fisheries policy	11.2			
				Prosecution of offenses	2			
	R & D - to develop new fisheries technologies			Fisheries research	11.9			
	Other Fisheries Management and Conservation Programmes			Fisheries services	5.9			

Norway

Category	Type of Subsidy	WTO (G/SCM/N/38/NOR) (US\$ M)		OECD (source: OECD pg 174) (US\$ M)		APEC		APEC Source
Capital and Infrastructure Support Programmes	Fleet Renewal and Modernization			Support to improve fleet efficiency, for market support, for energy conservation measures, and for joint venture companies in the coastal fleet.	1.8			
	Bait Services - Provided to Fishers	Support to Long-line Baiting Facilities		Other cost-reducing support (centers for baiting of long lines, for sealing for measures to improve safety on board vessels)	6.7			
	Development Grants - for fisheries enterprises	Support for specific fisheries (crab, coastal sprat)	0.1	Support for the crab and coastal sprat fisheries	0.1			
	Other Capital and Infrastructure Support Programmes	Transport support in order to facilitate implementations of fisheries activities in specific districts		Reduction in transport costs (support to reduce transport costs to facilitate fisheries activities in certain regions)	5			
Direct Assistance to Fishers and Fisheries Workers	Income Support Programmes			Income guarantee compensation, vacation support, unemployment insurance	2.8			
Lending Support Programmes	Subsidized loans	Modernization of fishing vessels (interest rate and construction loans)	14.1	Interest subsidies and support for building of vessels (transfers through the National Fishery Bank, in the form of interest rate subsidies and construction loan subsidies, to support the modernization of the fleet)	14.4			
Tax Preferences & Insurance Support Programmes	Income Tax Deferrals			Tax refunds and exemptions	34			

Norway

Category	Type of Subsidy	WTO (G/SCM/N/38/NOR) (US\$ M)		OECD (source: OECD pg 174) (US\$ M)		APEC		APEC Source
Fisheries Management and Conservation Programmes	R & D - for new fisheries technologies Fisheries Management Programmes Fisheries Enforcement Programmes Other Fisheries Management and Conservation Programmes	Fisheries research		Institute of Marine Research	13.5			
				Operations of research vessels	10			
				Ministry of Fisheries	3			
				Directorate of Fisheries	13.5			
				Coast Guard	57.6			
				Membership of international organisations	0.5			

Peru

Category	Type of Subsidy	WTO		OECD		APEC (US\$ M)		APEC Source
Lending Support Programmes	Loan Guarantees					FONDEPES - loan guarantees for equip. for artisanal vessels, etc.	0.9	Interviews

Philippines

Category	Type of Subsidy	WTO		OECD		APEC (US\$ M)		APEC Source
Capital and Infrastructure Support Programmes	Fishing Port Infrastructure Enhancement					Capital and Infrastructure Support Programme-port improvements for fishing fleets	2.2	Interviews

Poland

Category	Type of Subsidy	WTO (G/SCM/N/38/POL)*		OECD (source: OECD pg 174) (US\$ M)		APEC		APEC Source
Fisheries Management and Conservation Programmes	R & D - to develop new fisheries technologies			Research costs	3			
	Fisheries Management Programmes			Management costs	4.9			

*The subsidy notified is EFSAL loans for the restructuring of the fishery sector, however it is impossible to differentiate the actual subsidy amount from the total amount of the loan, thus it is not included here.

Portugal

Category	Type of Subsidy	WTO (G/SCM/N/38/EEC/Add.12/Rev.1) (US\$ M)		OECD (source: OECD pg 175) (US\$ M)		APEC		APEC Source
Capital and Infrastructure Support Programmes	Fleet Renewal and Modernization			Grants for renewal and modernization of the fishing fleet	2.4			
	Fishing Port Infrastructure Enhancement			Fishing port facilities	1.7			
Direct Assistance to Fishers and Fisheries Workers	Other Direct Payments to Fishers			Regional aid	0.4			
				Aid for small fisheries	1.6			
		New Support measures for the fishing sector*	0.02					
Lending Support Programmes	Subsidized Loans	Interest subsidy for investment in the transformation or improvement of fishing vessels	4.3					
		Interest subsidy for the purchase of machines and other equipment for fishing vessels	0.9					
		Interest subsidy for the purchase of fishing devices and tools	1					
		Interest subsidy for the purchase of second-hand fishing vessels	0.12					
		Interest subsidy for the construction or purchase of fishing vessels	0.03					
		Interest subsidy for the modification of fishing vessels	0.02					
		Interest subsidy for the purchase of tools, devices, and machines intended for fishing vessels	0.01					

Portugal

Category	Type of Subsidy	WTO (G/SCM/N/38/EEC/Add.12/Rev.1) (US\$ M)		OECD (source: OECD pg 175) (US\$ M)		APEC		APEC Source
		Interest subsidy for investment in the construction, purchase, transformation or conversion of fishing vessels	0.2					
Fisheries Management and Conservation Programmes	Fisheries Management Programmes			Management expenditure	9			
	Fisheries Enforcement Programmes			Enforcement expenditure	2.2			
	R & D - to develop new fisheries technologies			Research expenditure	8.8			
	Worker Adjustment Programmes			Grants for adjustment of fishing effort	5.3			
	Other Fisheries Management and Conservation Programmes			Protection of Marine Protected Areas	0.14			
Unclassified Subsidies				Unclassified transfers	0.14			

The listing for New Support Measures is perceived as a typo listed as millions of PTE, but given in dollars of PTE (otherwise the total value for the subsidy would be over US\$7 billion).

Russia

Category	Type of Subsidy	WTO		OECD		APEC (US\$ M)		APEC Source
Capital and Infrastructure Support Programmes	Fleet Renewal and Modernization							Ryba - Fleet renewal and modernization (scrapping older vessels and replacing them with newer factory trawlers. By 2001, 77% of fishing fleet and 60% of support fleet is to be scrapped or completely rebuilt. Replaced by new factory trawlers from Norway, Germany, and Spain. North Pacific Fishery Management Council, Clarence Pautzke - http://russia.shaps.hawaii.edu/fishing/country/russia/fish-rfe-all.html

Spain

Category	Type of Subsidy	WTO (G/SCM/N/38/EEC/Add.13) (US\$ M)		OECD (source: OECD pg 176) (US\$ M)		APEC		APEC Source	
	Income Support Programmes	Aid to shipowners who have been forced temporarily to stop fishing	8.3	Temporary payments to fishing owners (assistance for temporary cessation of fishing activities paid to vessel owners who were obliged to lay up their vessels in the Moroccan fishing zone)	5.2				
		Individual compensatory programmes for fishermen	1	Temporary payments to fishers (same as above for fishermen)	1				
		Transfers to Autonomous Communities	28.6	Regional aid for temporary stoppage of fishing	2.4				
		Temporary stoppage	5.2						
		Definitive stoppage in the Basque Country	7.75						
		Definitive stoppage	0.13						
Direct Assistance to Fishers and Fisheries Workers	Other Direct Payments to Fishers	Subsidies for the improvement of fishing	0.5						
Capital and Infrastructure Support Programmes	State Investments - in state-owned fisheries enterprises	Temporary business associations in the fishing sector	3.4	Payments for temporary joint ventures in third country waters	3.4				
		Establishment of Joint Ventures for the exploitation of fish stocks of the third country to supply EC market	16.1	Payments for permanent joint ventures in third country waters	13.3				
	Fishing Port Infrastructure Enhancement			Support for port facilities	5.1				
				Regional aid for port facilities	0.5				
	Fleet Renewal and Modernization	Reorganisation and renovation of the fishing fleet:							
		Building	1.6	Support for new vessel construction	10				
	Modernization	0.04	Support for vessel modernization	2					

Spain

Category	Type of Subsidy	WTO (G/SCM/N/38/EEC/Add.13) (US\$ M)		OECD (source: OECD pg 176) (US\$ M)		APEC		APEC Source	
Fisheries Management and Conservation Programmes	R & D - for development of new fisheries technologies			Exploratory fishing	1.3				
				Other research expenditure	10.3				
	Fisheries Management Programmes			Management expenditure	15.9				
	Fisheries Enforcement Programmes			Enforcement expenditure	5.8				
	Vessel Buybacks			Payments for the permanent withdrawal of fishing vessels	46				
	Other Fisheries Management and Conservation Programmes	Early Retirement for Fishers	0.5		Artificial reefs	0.4			
					Marine reserves	0.6			

Sweden

Category	Type of Subsidy	WTO (G/SCM/N/38/EEC/Add.14) (US\$ M)	OECD (source: OECD pg 177) (US\$ M)	APEC	APEC Source	
Capital and Infrastructure Support Programmes	Fleet Renewal and Modernization	<i>Aid for fleet renewal and modernisation of fishing vessels</i>	0.6	<i>Grants for fleet renewal and modernization</i>	0.6	
	Fishing Port Infrastructure Enhancement	<i>Investment aid to fishing port facilities</i>		<i>Support for fishing port facilities</i>	0.3	
				<i>Support for fishing ports</i>	0.1	
Direct Assistance to Fishers and Fisheries Workers	Unemployment Insurance			<i>Unemployment insurance payments</i>	3.3	
	Income Support Programmes	<i>Financial compensation to producers' organisations for losses when fish has been withdrawn from the market</i>		<i>Financial compensation to producers' organisations for losses when fish are withdrawn from the market</i>	0.5	
	Other Direct Payments to Fishers	<i>Aid to studies and pilot projects to improve and adapt structures in the fisheries and aquaculture sector</i>	0.2	<i>Regional aid</i>	0.2	
Marketing and Price Support Programmes	Fish Product Promotion Programmes	<i>Aid for promotion/marketing</i>	0.2			
Fisheries Management and Conservation Programmes	Worker Adjustment Programmes	<i>Aid for adjustment of fishing effort</i>	0.9	<i>Grants for adjustment of fishing effort</i>	0.9	
	R & D - to develop new fisheries technologies			<i>Research</i>	15.9	
	Fisheries Management Programmes			<i>Management costs</i>	7	
	Fisheries Enforcement Programmes			<i>Enforcement costs</i>	12.5	
	Stock Enhancement Programmes			<i>Aid for fish restocking</i>	0.2	
	Other Fisheries Management and	<i>PESCA Funds</i>	0.5	<i>PESCA funds</i>	0.4	

Sweden

Category	Type of Subsidy	WTO (G/SCM/N/38/EEC/Add.14) (US\$ M)		OECD (source: OECD pg 177) (US\$ M)		APEC		APEC Source
	Conservation Programmes	Investment aid for protection of coastal waters	0.6	Protection of marine areas	0.7			

Chinese Taipei

Category	Type of Subsidy	WTO		OECD		APEC (US\$ M)		APEC Source
Tax Preferences and Insurance Support Programmes	Vessel Insurance or Reinsurance Programmes					Marine insurance on fishing vessels and fishermen	6.3	Chinese Taipei Dept. of Fisheries
Marketing and Price Support Programmes	Fish Product Promotion Programmes					Fish Product Promotion Programmes	4.9	
Capital and Infrastructure Programmes	Fishing Port Infrastructure Enhancement					Fishery port construction	74	Taiwan Fishing Bureau
						Fishing port infrastructure enhancement	80.3	
Fisheries Management and Conservation Programmes	Stock Enhancement Programmes					Stock Enhancement	4.9	Chinese Taipei Dept. of Fisheries
	Programmes to Assess Fish Stocks					Stock assessment programmes	2.9	
						Fisheries Management	13.4	
	Fisheries Management Programmes					Management of marine recreational fisheries	1	

Thailand

Category	Type of Subsidy	WTO		OECD		APEC (US\$ M)		APEC Source
Tax Preferences and Insurance Support Programmes	Fuel Tax Exemptions					Diesel Fuel Price Reduction Programme	2.75	Interviews
Fisheries Management and Conservation Programmes	Fisheries Management Programmes					Coral Management Programme	0.28	Enterprise Canada Thailand

Turkey

Category	Type of Subsidy	WTO		OECD (source: OECD pg 177) (US\$ M)		APEC		APEC Source
Capital and Infrastructure Support Programmes	Development Grants - for fisheries enterprises			Development projects (financed through the Ministry of Agriculture and Rural Affairs)	1.5			
	Fishing Port Infrastructure Enhancement			Building fishing harbors (financed by Ministry of Transportation)	26			
Lending Support Programmes	Subsidized loans			Interest concessions (concessional loans to the fisheries sector by Turkey's Agricultural Bank)	1.1			

United Kingdom

Category	Type of Subsidy	WTO (G/SCM/N/38/EEC/Add.15) (US\$ M)		OECD (source: OECD pg 178) (US\$ M)		APEC		APEC Source	
Capital and Infrastructure Support Programmes	Fleet Renewal and Modernization	Safety Improvements on Fishing Vessels	0.65	Support for vessel modernization (safety equipment)	0.8				
				Support for vessel modernization (conditional that modernization does not increase capacity or effort)	0.65				
	Fishing Port Infrastructure Enhancement			Support for port facilities for fishers	0.3				
				Support for port facilities for fishers	6.4				
				fishing port facilities	2.6				
Lending Support Programmes	Subsidized loans	Highland Opportunity Limited: Fishing Vessel, Fish Processing and Fish Farming Loans (Discretionary reduced interest loans linked to free technical and business advice)	0.08						
Fisheries Management and Conservation Programmes	R & D - to develop new fisheries technologies			research	25				
	Fisheries Management Programmes			management	11.3				
	Fisheries Enforcement Programmes			enforcement	38.5				
	Vessel Buybacks			Payments for permanent withdrawal of fishing vessels	13.2				
	Other Fisheries Management and Conservation Programmes				Support for producers' organisations	0.1			
					Support to reduce restructuring costs	0.1			

United States

Category	Type of Subsidy	WTO		OECD (source: OECD pg 179) (US\$ M)		APEC (US\$ M)		APEC Source
Capital and Infrastructure Support Programmes	Fleet Renewal and Modernization State Investments - in state-owned fisheries enterprises			Fishery Finance Programme	0.25			
				Fishing Vessel Gear Damage Programme	0.2			
				Support the construction and reconstruction of fishing vessels	2.1			
				Fishermen's Contingency Fund	1			
				State and industry assistance	27			
Marketing and Price Support Programmes	Market Price Support			Market Intervention (Dept. of Ag.'s Market Access Programme)	3.4			
				Market intervention (Dept. of Ag.'s Surplus Commodity Removal Programme)	14			
	Fish Product Promotion Programmes			Promotion and development of fisheries (state science and mgt., product quality and seafood inspection programme)	0.38			
Lending Support Programmes	Subsidized Loans					Capital Construction Fund - allows fishermen to accelerate accumulation of funds with which to replace or improve fishing vessels (current total value of fund is 240 million - 2.5 annual in costs of running it)	2.5	NMFS, www.nmfs.gov/sfweb/sf/finasstsummary.htm

United States

Category	Type of Subsidy	WTO		OECD (source: OECD pg 179) (US\$ M)		APEC (US\$ M)		APEC Source
Tax Preferences and Insurance Support Programmes	Fuel Tax Exemptions			Diesel and Gasoline Tax Exemption	150	Diesel and gasoline excise tax exemption	150	WTO (WT/CTE/W/80/Add.1)
	Vessel Buybacks			Payments for the permanent withdrawal of fishing vessels	3.5			
				Information collection and analysis (NMFS budget)	165.7	Fisheries Finance Programme (Saltonstall-Kennedy Grant Programme) - fund provides grants for fisheries research and development projects	2.5	
	R & D - to develop new fisheries technologies			Marine Fisheries Initiative	3	Marine Fisheries Initiative - grants to conduct research	3	NMFS, www.nmfs.gov/sfweb/sf/finasstssu3mmary.htm
	Fisheries Management Programmes			Conservation and Management	95.4			
Fisheries Management and Conservation Programmes	Fisheries Enforcement Programmes			Enforcement Costs (fisheries enforcement activities by Coast Guard)	400			

Vietnam

Category	Type of Subsidy	WTO		OECD (source: OECD pg 179)		APEC (US\$ M)		APEC Source
Lending Support Programmes	Subsidized loans					Soft Loan Programme - to build and upgrade fishing boats (as a result, high capacity fishing fleet has increased by 5000 pieces creating more than 10,000 new jobs)	30.7	
Capital and Infrastructure Support Programmes	Fishing Port Infrastructure Enhancement					Fishing Port Construction	4.6	Ministry of Planning & Investment, Ministry of Fisheries

¹ FAO Fisheries Department, *Marine Fisheries and the Law of the Sea: A Decade of Change* (Special chapter (revised) of *The State of Food and Agriculture 1992*), FAO Fisheries Circular No. 853 (Rome, 1993), pp. 32, 50-53.

² Steenblik, R. Previous Multilateral Efforts to Discipline Subsidies to Natural Resource Industries. 1998.

³ See Hannesson, R. Economic Support of the Fishing Industry: Effects on Efficiency and Trade. 1997; see also Schorr, fn. 17.

⁴ FAO and OECD began investigating fishing subsidies in the 1960s, however the issue did not gain international attention until the 1990s.

⁵ FAO. *Marine Fisheries and the Law of the Sea: A Decade of Change*. Special Chapter to *The State of Food & Agriculture 1992*, pp. 17 – 19 and pp. 50 – 53. 1993.

⁶ WTO. Article 25 of Agreement on Subsidies and Countervailing Measures. Doc. No. G/SCM/N/25/EEC, 1998.

⁷ WTO subsidy notifications can be retrieved from the WTO website at <http://www.wto.org> by searching for documents with formal document numbers including the text “G/SCM/N”.

⁸ Schorr, D. *Towards Rational Disciplines on Subsidies to the Fishery Sector*. 1998.

⁹ Milazzo, *Subsidies in World Fisheries: A Reexamination* (World Bank 1998) (hereinafter “World Bank”).

¹⁰ This number excludes what Milazzo terms ‘Resource-Rent Subsidies’, which are defined as a country’s failure to capture from the fishing industry the costs of managing the fisheries resource. Milazzo considers this failure a government subsidy, although there have been no similar reports or estimates of such subsidies. Without further information with which to compare this type of subsidy, it is not considered for the purposes of this review.

¹¹ As of October 2001, OECD members are: Australia, Austria, Belgium, Canada, Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Japan, Korea, Luxembourg, Mexico, Netherlands, New Zealand, Norway, Poland, Portugal, Slovak Republic, Spain, Sweden, Switzerland, Turkey, United Kingdom, and the United States of America.

¹² The APEC report can be found on the APEC website, <http://www.apecsec.org.sg> (under “Activities / Fisheries Working Group”).

¹³ As of October 2001, APEC members are: Australia, Brunei Darussalam, Canada, Chile, People’s Republic of China, Hong Kong, Indonesia, Japan, Korea, Malaysia, Mexico, New Zealand, Papua New Guinea, Peru, Philippines, Russia, Singapore, Chinese Taipei, Thailand, United States of America, and Vietnam.

¹⁴ Of course, the WTO remains the sole intergovernmental source of official information about fishing subsidies at the global level. Unfortunately, the value of that source is compromised by the poor reporting records of most WTO members.

¹⁵ This technical report focuses exclusively on information about fishing subsidies available at the international or intergovernmental level. That is, no effort is made here to conduct or review primary research about information that may be available at the national level. The focus on the international level is justified by the fact that only information produced at that level has so far had a significant impact on the fishing subsidies debate. Moreover, many potential sources of information at the national level are limited in their usefulness by the logistical and sometimes the linguistic barriers to their use. For an excellent review of some of the national sources readily available, see Steenblik and Wallis (2001). Some information from these sources is included in the official international reports given by APEC, the OECD or the WTO.

¹⁶ See, e.g., FAO, *Marine Fisheries and the Law of the Sea: A Decade of Change*, Special Chapter to the State of Food & Agriculture 1992. Stone, C., Too Many Fishing Boats, Too Few Fish: Can Trade Laws Trim Subsidies and Restore the Balance of Global Fisheries? *Ecological Quarterly* 24, 1997. Porter, G., Fishing Subsidies, Overfishing and Trade, UNEP/WWF Workshop on the role of trade policies in the fishing sector, June 1997. WTO Committee on Trade and the Environment, Note by the Secretariat in GATT/WTO Rules on Subsidies and Aids Granted in the Fishing Industry, Doc. No. WT/CTE/W/80, 1998. APEC, Fisheries Working Group, Study Into the Nature and Extent of Subsidies in the Fishing Sector of APEC Members Economies, June, 2000. OECD, *Transition to Responsible Fisheries: Economic and Policy Implications*, Paris, 2000. FAO, Report of the Expert Consultation on Economic Incentives and Responsible Fisheries, Rome, Italy, 28 November – 1 December, 2000, Fisheries Report No. 638.

¹⁷ This WTO requirement applies regardless of whether a given subsidy may be “actionable” (subject to challenge) under WTO rules.

¹⁸ OECD, pp. 128-29.

¹⁹ APEC, pp. 3-4.

²⁰ For a general discussion of the application of the WTO definition to fishing subsidies, see Schorr, pp. 153-55; see also Stone, C. 1997. Too Many Fishing Boats, Too Few Fish: Can Trade Laws Trim Subsidies and Restore the Balance in Global Fisheries? *Ecological Law Quarterly* 24.

²¹ For a general overview of this issue, see Martin, et al., *A Handbook for Negotiating Fishing Access Agreements* (WWF 2001).

²² WWF does not subscribe to this view. Foreign access payments clearly are a transfer of funds, and certainly confer a benefit on fishing industry interests. The fact that the fishing interests are not the direct recipient of the transfer is not necessarily an obstacle to the subsidy being included within the WTO definition. On this issue and the scope of the WTO's definition generally, see Schorr, p. 153 & fn. 41.

²³ APEC. Ibid. pp. 41.

²⁴ See the discussion in Milazzo, M. The International Debate on Fish Subsidies. Presentation given at a conference at the University of Akureyri on the competitiveness of the Icelandic fishing industry. 2000.

²⁵ The U.S. report to the OECD may be the most significant example of this. See OECD p. 179.

²⁶ APEC, *ibid.* pp. 17.

²⁷ OECD, *Ibid.*, 2000. APEC, *Ibid.*, 2000. FAO. *Ibid.*, 2001.

²⁸ The subcategories 'Worker Adjustment Programmes' and 'Fisher Retraining' were moved from category 1 (Direct Assistance to Fishers and Fisheries Workers) to category 6 (Fisheries Management, Research, Effort Reduction and Conservation Programmes), to reflect the similar programmes in this category with which they are often coupled.

²⁹ This category includes subsidy programmes that are designed with the purpose of management and conservation, but does not seek to make any determination or statement about whether or not any of the programmes included here actually have that effect on fisheries, or even the opposite. Originally in the APEC categorization, this category was termed 'Fisheries Management and Conservation Programmes', however, the objectives of Research and Effort Reduction were included to more thoroughly reflect all of the types of programmes placed in this category which could not be located in others.

³⁰ See generally, Subsidies Agreement, Arts. 3, 5, & 8. "Prohibited" subsidies generally are trade-contingent subsidies that directly promote exports or restrain imports. "Actionable" subsidies are those not prohibited outright, but subject to challenge under WTO rules. Non-actionable subsidies are those falling within certain narrow classes of subsidies protected by the WTO rules. For a discussion of how these categories apply to fishing subsidies, see Schorr, 150-53.

³¹ As previously noted, this study is based entirely on data reported by governments to intergovernmental bodies, and does not include information that might be discovered through research into official sources at the national level.

³² The totals presented in Tables 1 and 2 are for 1996 and 1997 only, limited by the years the OECD covered. Note also that the World Bank study did not include sufficient "officially reported data" to be included in the synopsis offered here. While the Bank study did rely in part on information from government sources, that information is thoroughly entwined in the Bank report with other estimates and extrapolations, making its inclusion difficult and inappropriate at the level of aggregation offered in this report.

³³ An example of a rote reclassification was a subsidy reported by Denmark to the WTO for 'Modernization of fishing vessels' in 1997 (WTO Doc. G/SCM/N/25/EEC, 1998), easily reclassified here as 'Fleet Renewal and Modernization' under the 'Capital and Infrastructure Support' category. A more difficult case was a Norwegian subsidy reported to the WTO for 'Transport support in order to facilitate implementations of fisheries activities in specific districts' in 1997 (WTO Doc. G/SCM/N/25/NOR, 1998). Since there was no clear type of subsidy applicable to this listing, transport support for fisheries activities was considered capital support to the fisheries, and thus placed under the category of 'Capital and Infrastructure Support' as 'Other Capital and Infrastructure Support Programmes.' Better information about the subsidy in cases like this might lead to different classifications.

³⁴ In an easy case, Korea reported a subsidy to the WTO for 'Support for the development of the deep-sea fishery' in 1997, for US\$ 5.7 million (WTO Doc. G/SCM/N/38/KOR). Similarly, the OECD reports a 1997 subsidy for Korea for 'Support for the development of the deep-sea fishery', totaling US\$ 5.85 million. These were interpreted to represent the same subsidy, and the difference between their reported amounts contributed to a range, US\$ 5.7 – 5.85 million. In a tougher case, Japan reported a subsidy to the WTO labeled 'Fisheries Trust Fund Subsidy – for insurance for fisheries disasters', totaling US\$ 1.3 million in 1997. The OECD reported a subsidy from Japan for the same year labeled only, 'Re-insurance for damage of fishing vessels and mutual-aid insurance for fisheries disasters', also for a total of US\$ 1.3 million. While the subsidy programmes do not bear identical names, they were judged to be the same based on purpose and amounts.

³⁵ *Ibid.*, p. 11.

³⁶ *Ibid.*

³⁷ This number (US\$385) represents a report by APEC for Korea of US\$351 M. This number is given as lending support programmes, but as APEC describes, is actually the sum of all fishing subsidy programmes reported by Korea that year, and APEC quotes OECD as the source for this number. It is presented here under the APEC column for lending programmes because that is how APEC reports the amount, but this amount represents the sum of all programmes listed by the OECD. For this reason, it is not figured into the combined total, and in this case the OECD numbers are used in preference over the APEC number.

³⁸ This enormous amount reported to the WTO under ‘Tax Preferences and Insurance Support Programmes’ results from a WTO notification by Japan of a subsidy for accelerated depreciation of fishing boats, valued at US\$4,989 million (G/SCM/N/38/JPN). As discussed at various points in the text, this notification is single-handedly responsible for most of the variation between the 1996 and 1997 totals of officially reported subsidies compiled by this report. It also represents a huge subsidy not otherwise captured by APEC or the OECD. Naturally, the question arises whether it should be considered an anomaly. WWF concludes, pending better evidence to the contrary, that it is not. Although it is reported for only one of the two years discussed here, Japan retroactively reported the programme, with roughly equivalent values, for each year from 1991 to 1996. See WTO Doc. No. G/SCM/N/38/JPN (17 August 1998), p. 78 (entry No. 67). Moreover, nothing on the face of the subsidy suggests it is extraordinary in nature. Finally, the fact that it was not reported in 1997 does not allow any clear conclusion, given the long delay in reporting the original programme, and given the habit of most WTO members to delay or neglect most reporting of fishing subsidies to the WTO.

³⁹ Data for fisheries management, research, effort reduction and conservation programmes reported to the WTO is incomplete, and likely the total for this category reported to the WTO is larger than indicated here. However, these subsidy programmes are generally those of EU countries, which are well-documented by the OECD study, so the combined total is unlikely to be affected.

⁴⁰ The OECD totals presented here are slightly higher than the totals OECD reports in *Transition to Responsible Fisheries: Economic and Policy Implications*. OECD also reported cost-recovery programmes and amounts in some cases, subtracting costs recovered from total subsidies to report, in essence, net subsidies. This report deals only with subsidy programmes, and does not subtract cost-recovery programmes, thus the totals for OECD are slightly higher.

⁴¹ APEC generally reported subsidies only for the most recent year available, so where similar subsidy information was available for programmes starting in 1997, the 1996 programme may not have been reported. As a result, this number may be low for reported subsidy values to the fish-harvesting sector in 1996 in APEC member countries.

⁴² WTO notifications record over US\$ 8.4 billion in aid to the shipbuilding sector in 1996, and almost US\$ 4.5 billion in 1997. However, these totals are not included here because it is impossible to determine from the WTO notifications what portion, if any, of these subsidies were provided to support fishing vessel construction.

⁴³ Some of the subsidies reported in this category reflect public services provided by governments for the management of fisheries. WWF does not consider these services as “subsidies” in the operational policy sense. See discussion, Part II.A, above.

⁴⁴ The OECD totals presented here are slightly higher than the totals OECD reports in *Transition to Responsible Fisheries: Economic and Policy Implications*. OECD also reported cost-recovery programmes and amounts in some cases, subtracting costs recovered from total subsidies to report, in essence, net subsidies. This report deals only with subsidy programmes, and does not subtract cost-recovery programmes, thus the totals for OECD are slightly higher.

⁴⁵ APEC generally reported subsidies only for the most recent year available, so where similar subsidy information was available for programmes starting in 1997, the 1996 programme may not have been reported. As a result, this number may be low for reported subsidy values to the fish-harvesting sector in 1996 in APEC member countries.

⁴⁶ See discussion in Part V, below.

⁴⁷ World Bank, p. 73. This range did not include any “resource rent” subsidies that might be said to accrue from failure to recover the cost of government fisheries management services. See Part II.A.

⁴⁸ In reviewing this table, recall that neither OECD nor APEC data is global in coverage, and that the authors of the APEC study did not attempt—or at least to report—data meant to produce reliable totals for any single year covered by their work. Thus, some of the apparent disparities in this table are due to comparing different kinds of data. Nevertheless, the degree of the differences, and particularly the comparisons with the World Bank data may raise interesting questions.

⁴⁹ The ‘Fisheries Management & Conservation Programmes’ numbers estimated by the World Bank study are somewhat low in comparison to those reported by the OECD and APEC, however the World Bank study did not necessarily consider government-budgeted management expenditures as subsidies, mainly just decommissioning subsidies. On the other hand, OECD and APEC include management expenditures such as management costs budgeted by the National Marine Fisheries Service in the United States.

⁵⁰ Regardless of whether the large 1996 notification by Japan is considered an anomaly, it represents far more in a single programme than any of the other data sources suggest as a total for that subsidy type. Thus, for purposes of comparing the results in Tables 1 and 2 to “expectable” results, it is interesting to look at the implications without the Japanese subsidy.

⁵¹ See *Fishing in the Dark: Symposium Proceedings* (WWF 2001)

⁵² Schorr, pp. 153-155.

⁵³ FAO. FAOSTAT database, global marine fish production 1997.

⁵⁴ These country-by-country totals of officially reported subsidies to fish harvesting are the sum of the country-by-country listings in Appendix I.

⁵⁵ In fact, the only difference between the OECD report (as well as the World Bank estimates) and the subsidy levels reported to the WTO is US\$200 – 300 million in foreign access payments.

⁵⁶ The Japanese chose to submit a country report that was more narrowly focussed than others. Moreover, Japan apparently did not report to the OECD its nearly US\$ 5 billion tax relief programme (see fn. 38 and accompanying text).

⁵⁷ APEC, p. 11.

⁵⁸ OECD. *Ibid.*, pp. 171.

⁵⁹ World Bank. *Ibid.*, pp. 18 – 20, 39,

⁶⁰ WTO Doc. No. G/SCM/N/38/JPN; see fn. 38 and text, above.

⁶¹ WTO Doc. No. G/SCM/N/25/KOR, G/SCM/N/38/KOR, G/SCM/N/48/KOR.

⁶² OECD. *Ibid.*, pp. 172.

⁶³ OECD. *Ibid.*, pp. 164, APEC, *Ibid.*, pp. 2 – 19, Appendix A.

⁶⁴ OECD. *Ibid.*, pp. 179.

⁶⁵ FAO. FAOSTAT database, 1997.

⁶⁶ World Bank. *Ibid.*, pp. 31.

⁶⁷ APEC. *Ibid.*, pp. 19 – 28, Appendix A.

⁶⁸ APEC, *Ibid.*, pp. 75 – 76, Appendix A.

⁶⁹ WTO, *Ibid.*

⁷⁰ Fitzpatrick, J. and C. Newton. *Assessment of the World’s Fishing Fleet 1991 – 1997, 1998.* see Appendix 2.

⁷¹ European Community. *Eighth Survey on State Aid in the European Union, 2000.* pp. 22.

⁷² World Bank. *Ibid.*, pp. 42 – 43.

⁷³ OECD. *Ibid.*, pp. 131.

⁷⁴ APEC. *Ibid.*, pp. 152 – 155, Appendix A.

⁷⁵ World Bank. *Ibid.*, pp. 43.

⁷⁶ World Bank. *Ibid.*, pp. 48.

⁷⁷ World Bank. *Ibid.*, pp. 48.

⁷⁸ World Bank, p. 73.

⁷⁹ According to the report, this estimating process included assigning values to those subsidy programmes—20% of the total number reported—which had been reported to the study authors without monetary values. For these, an estimate was made based on comparing them with similar programmes of the same country for which financial information was available. If this option was unavailable, a comparison was made to programmes in another member economy with a similar economic profile. See APEC, p. 11.

⁸⁰ APEC, p. 17. Note that the APEC report also estimates total worldwide subsidies to what it calls the “fisheries sector” (including aquaculture) at US\$ 12.6 billion. *Ibid.*, p. 11.

⁸¹ See also footnote 38, above, regarding the implication of the large Japanese WTO notification in 1996.

⁸² *I.e.*, programmes for which the APEC study authors subsequently estimated values, *see* footnote 79, above.

⁸³ This was obviously the case for non-monetized subsidies from China, since China is not presently an OECD or WTO member. Another example is fishery disaster assistance offered by the United States. At least one such programme was reported to APEC (see programme no. USA 7.0 on p. A-152) without values. No such US programmes were included in OECD data tables, nor have they been notified to the WTO.

⁸⁴ World Bank, p. 33.