

**Impact Assessment of the FairFishing Project in
Berbera, Somaliland**

Final Report

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List of Abbreviations

EU	European Union
FAO	United Nations Food and Agriculture Organization
FGD	Focus Group Discussion
GDP	Gross Domestic Product
NGO	Non Governmental Organisation
POFF	Partner Organisation FairFishing
PSU	Partner Supply Unit
SOS	Somaliland Shilling
UN	United Nations
UNDP	United Nations Development Programme
USD	United States Dollars

Executive Summary

Introduction

The report presents the findings from an early impact assessment of the project “FairFishing’s Fish Station in Berbera, Somaliland.” The project is being implemented by an independent Danish-Somali international NGO called FairFishing. FairFishing works to fulfil the needs for gainful employment, nutrition and optimal, rightful utilisation of marine resources. Since late 2011, they have worked with fishermen, fishery companies, local and national organisations, ministries and authorities to develop artisanal and commercially viable fisheries in Somaliland.

At the centre of the project is the “FairFishing Station”, which opened in October 2013, and which is a service station consisting of containers, office administration, and ice/cooling facilities equipped for handling, filleting, and processing fish on land at the benefits of the local fishermen. The project expects to phase out in 2017, where it is planned, that the management and ownership of the station will be taken over by a group of local partners. The local partners are the users of the FairFishing, also known as the boat owners and they are among the main beneficiaries of the project.

The assessment covers a range of issues in relation to the outcomes of the programme at the levels of beneficiaries, and the wider community, and it also assesses the extent to which the impact can be expected to last beyond the project, thereby addressing the sustainability of the project. Three overall evaluation questions were formulated at the early stage of the assignment, and they have guided the data collection, which took place through a field visit to Somaliland in November 2014.

The project

The rationale of FairFishing is that if fishery is financially attractive as a business and available and viable for the impoverished and often unemployed population of Somaliland. This would then be achieved by focusing on the neglected and inadequate fishery infrastructure in Berbera.

The first strategy phase “infrastructure on land” has consisted of establishing a stable fishery infrastructure in Berbera; including facilities and equipment on shore for catching, handling, processing and transporting of fish. The FairFishing station is central in this regard, and functions as a facility, which provides ice and storage facilities for catch. Subsequent to landing the fish, the station furthermore offers the services of preparing the catch for sale the same day, or of storing the catch in a freezer for a couple of days before sale, or to process the fish into fillets or other kinds of cutting and then keep it cooled or frozen in order for longer transport or export.

The second strategy phase “infrastructure at sea” is focused on establishing a stable sea infrastructure, including training of the fishermen on fishing strategies, as well as the improvement of the available equipment. A so-called

Partner Supply Unit (PSU) was established and opened in January 2015. The PSU functions as a purchasing unit where the local partners of FairFishing can buy fishing equipment and spare parts, for example nets, hooks, ropes and electronic equipment.

The third phase is focused on “transition to local ownership” building on the idea that in the long term, the station and the FairFishing organisation must be self-sustainable and self-administrated by the local boat owners, skippers and fishermen. The idea is that the FairFishing project should be handed over to the local structures in 2017. At this stage, a so-called Partner Organisation FairFishing (POFF) is being prepared, in hope that the POFF will start and continue the self-sustainable, locally administrated and non-profit management of the FairFishing project.

In addition to the boat owners, the employees of the boat owners: skippers and fishermen are also among the primary target groups. Finally, staff of FairFishing in Berbera is also considered beneficiaries of the project.

Outcomes of the project

A range of positive results has been produced by the project, having direct impact at household levels as well as at the level of the fishery sector in Berbera.

Since the opening of the station in October 2013, over 400 tons of fish has passed through the station. The boat owners have experienced an increased turnover since they joined FairFishing, because they have now access to a reliable and cheap cold storage facility at the harbour. The availability and accessibility of affordable ice is one of the main aspects of the station, and it has led to several results – notable savings on ice, improved quality of the fish, and the increased access to markets because of boxes for transport and cooling of the fish. This enables the boat owners to catch more fish than before, because storage of catch is no longer a problem. An increase in the consumption of fish in Berbera has also been reported, which is considered a positive achievement from both nutrition and food security perspectives.

The improvement in relation to the ice availability and processing services has been noted and appreciated by official stakeholders such as the Berbera City Council, Ministry for Fisheries and Marine Resources and the Maritime and Fisheries Academy in Somaliland.

This increased turnover materialises in noticeable increases in income for beneficiaries, expansion of the fleet of boat owners, and generation of more work for crew and employment generation. Skills development of fishermen has also taken place in relation to fishing, including the use of new types of nets and how to repair nets.

Both crew members and boat owners report (55 out of 56 respondents) an increase in income compared with their income situation one year prior to the opening of the station. This increase in income is noticeable, 122% average

income increase for boat owners, and 92% average income increase for crew members.

This increased income has allowed households to enjoy a range of benefits including: Building of houses, paying for children's education, having a more secured work life, getting married, and a general feeling of being more encouraged about work.

Sustainability of the project

As mentioned, the FairFishing project has led to positive developments in various ways and for different target groups. It raises the crucial question of to which extent these developments are likely to continue beyond the project. There are mainly two challenges in relation to the sustainability of the project: Financial and organisational. The financial sustainability is partly constrained by high electricity costs for running the station. FairFishing is investigating possible alternative solar solutions, and the Partner Supply Unit is also expected to generate income for the running and maintenance of the station in the future. With regard to organisational sustainability, the before mentioned Partner Organisation FairFishing is part of the third phase of the project. These changes require some new mind-sets and time for the partners to see themselves as part of a cooperation-structure jointly with other boat owners. The assessment has found that FairFishing is pro-actively putting measures in place to ensure sustainability, but the obstacles and challenges are not easily overcome.

On the other hand a range of factors have been identified, which have positive potential for enhancing the sustainability of the project. First of all, the increased consumption and demand for fish, which has been identified during the assignment. This indicates that there is a market driven foundation for the project, and in that sense the services of the station are expected to be in continuous demand. Secondly, there is a strong interest among the partners to maintain the station. Thirdly, the station and its way of functioning is very well supported and backed up by the Somaliland government. There is a positive political environment in support of the station, and the project is fully inline with national government priorities for the sector, for example in relation to Somaliland's National Development Plan (2012) whose priorities for the fisheries comprise (among others) "Establishing cold chain facilities from producing ports to markets."

Conclusion

Overall, this assessment has found that FairFishing has brought positive developments to Berbera. The timing seems to be an important factor also, because FairFishing started operations at a time when other actors were also increasingly becoming interested and engaged in fisheries in Berbera. A FAO funded programme in support of rehabilitation of Berbera port and provision of equipment is under way, and another EU funded programme with the aim of providing cold storage facilities in a range of towns along the Somaliland coast is also in the pipeline. It is thus expected that the efforts and positive results of the

FairFishing can both reinforce and be reinforced by these supplementary interventions.

FairFishing project has within a relatively short time period managed to create a range of positive results for its beneficiaries. The station, referred to as a model by the Somaliland Ministry of Fisheries and Marine Resources, is highly appreciated by its partners who represent 85% of the total group of boat owners in Berbera.

Another aspect where FairFaishing has played a positive role is in relation to the quest for international cooperation by the Somaliland authorities. Stakeholders and staff mentioned that there is a general wish in Somaliland to gain international recognition as an independent state, and linkages with foreigners can help in brining development to Somaliland.

Now that FairFishing has established itself a well functioning and results-creating organisation, it will be of crucial importance that the initiatives for ensuring financial and organisational sustainability become successful. The organisation has already proven its capacity to solve challenges in flexible, effective and innovative ways, so it provides a strong foundation for also tackling the sustainability challenges in the time to come.

1. Introduction

This report presents the findings from an early impact assessment of the project “FairFishing’s Fish Station in Berbera, Somaliland.” Berbera is a town in the Sahil region of Somaliland, at the southern coast of the Gulf of Aden. The project is being implemented by an independent Danish-Somali international NGO called FairFishing. FairFishing works to fulfil the needs for gainful employment, nutrition and optimal, rightful utilisation of marine resources. Since late 2011, they have worked with fishermen, fishery companies, local and national organisations, ministries and authorities to develop artisanal and commercially viable fisheries in Somaliland. At the centre of the project is the “FairFishing Station”, which opened in October 2013, and which is a service station consisting of containers, office administration, and ice/cooling facilities equipped for handling, filleting, and processing fish on land at the benefits of the local fishermen. The project expects to phase out in 2017, where it is planned, that the management and ownership of the station will be taken over by a group of local partners. The local partners are the users of the FairFishing, also known as the boat owners and they are among the main beneficiaries of the project.



Photo: Wall paint by the entrance to FairFishing Office, Berbera

As mentioned, the FairFishing Station opened in October 2013 and it marks the starting point of this impact assessment, which was carried out from October 2014 - February 2015. A mid-term impact assessment is scheduled for 2015/2016, and an end-term impact assessment is foreseen for 2017. This early impact assessment will thus document and analyse the effects and impacts of the station a little more than one year after its opening, while also providing a set

data, which can be used for a (late) baseline comparison at the mid-term and again at the end of the project.

The assessment covers a range of issues in relation to the outcomes of the programme at the levels of beneficiaries, and the wider community, and it also assesses the extent to which the impact can be expected to last beyond the project, thereby addressing the sustainability of the project. The following three overall evaluation questions were formulated at the early stage of the assignment, and they have guided the data collection, which took place through a field visit to Somaliland in November 2014.

1) What have been the outcomes of the FairFishing project in relation to the direct beneficiaries and wider community of the project – in terms of employment, income generation, infrastructural and skills development?

(2) What are the impacts of these outcomes at individual / household level?

(3) To which extent and how is the project likely to have a sustainable impact on poverty reduction?

Consultant Julie Thaarup from the Nordic Consulting Group carried out the assignment. She would like to use this opportunity to thank warmly FairFishing volunteers and staff with whom she has worked closely and fruitfully in this assignment, notably (in alphabetic order):

Amanda Møller Rasmussen, Carl Jørgen Bindslev, Christina Ørgaard, Kurt Bertelsen, Toyah Hunting, and Yusuf Abdilahi Guuleed. A positive cooperation furthermore took place with Mustafe Muuse Budh-jabay, a local assistant who was engaged as a translator during interviews and meetings as well as in relation to translation of documents. In addition, a large number of other people were engaged with during this assignment. Unfortunately they cannot all be mentioned here, but they include FairFishing board members, the FairFishing Station and office staff in Berbera, Somaliland government officials, and not least beneficiaries whom she has met during fieldwork, and who have kindly shared their experiences, stories, and time with her.

The outline of this report is as follows: Chapter 2 presents a short context description of Berbera and Somaliland, followed by a description of the FairFishing project in chapter 3. The methodology is provided in chapter 4, and findings are provided in Chapter 5. Two Case stories are presented in chapter 6, and finally the Conclusions in chapter 7.

Attached as annexes are 1) The impact assessment methodology matrix outlining key questions to be asked, data collection tools and sources of information and 2) Survey Questionnaire (English version only is enclosed, Somali version was used in the field), and 3) Baseline data.

2. Somaliland and Berbera

Somaliland is a self-declared independent state, though internationally unrecognised. Somaliland declared itself an autonomous region in 1991; a popular referendum in 2001 on independence confirmed the will the Somaliland people to remain independent from war-torn Somalia. Somaliland's development path has been led by five democratically elected governments, with the House of Elders (Guurti) playing a traditionally-mandated role in maintaining peace, order and cultural integrity.

Today, Somaliland has a working political system, government institutions, a police force and its own currency¹. The territory has lobbied hard to win support for its claim to be a sovereign state. Although there is a thriving private business sector, poverty and unemployment are widespread – according to a World Bank Report, the unemployment rate is as high as 80%².

Livestock is the main pillar of Somaliland's economy, it is estimated to contribute to 60% of GDP, with customs duties representing 85% of central government revenue and livestock representing the majority of export earnings. Remittances are another key economic sector³.

Somaliland has made remarkable, visible progress in rebuilding its economy in the last two decades. According to the 2013 World Bank/MoNPD⁴ Household Survey, Somaliland's GDP is estimated at USD 1.390,9, million with GDP per capita estimated at USD 348. But there is still a long way to go to achieving prosperity as set out in the Somaliland 2030 vision.

The emergence of piracy off the coast of Somalia in the western Indian Ocean has had some unforeseen consequences for Somaliland, including the engagement of various international bodies, such as the United Nations. Since 2008, the government of Somaliland has been defined as a stakeholder in UN-led counter-piracy operations and been a beneficiary of various forms of "capacity-building" assistance, including resources for developing a judicial and policing system to handle piracy prosecutions. Unlike Puntland, Somaliland does not have any known pirate bases.

Somaliland's coastline and territorial waters host one of the busiest maritime lanes in the world, for which it has national and international obligations to keep it safe and open. The Government has determined that development and management of its marine resources is a priority, which also includes prioritisation of its fisheries. This too requires a stronger coast guard to manage illegal, unreported and unregulated fishing, a problem, which does exist for Somaliland.

¹ Somaliland Shilling (SOS)

² The World Bank and IFC: Doing Business in Hargeisa, 2012.

³ Ibid

⁴ Ministry of National Planning and Development

The exact effects of illegal fishing on the FairFishing project are not possible to determine within the scope of this impact assessment. Furthermore, the exact scale and identification of the perpetrators of the illegal fishing in the waters of Somaliland (and Somalia) is hard to know, because of little and inadequate accessible data. In December 2014, more than 51 Yemeni boats and Egyptian ships were seized for fishing illegally in Somaliland waters. More than 250 fishermen were on board and it is referred to as the biggest arrest ever by Somaliland's coastguards, trained by actors such as EUCAP Nestor⁵

Berbera is placed in one of the few natural sand slips on the Somaliland coastline, which insulate a natural harbour; due to its placement there has therefore historically been small-scale fishery for many years. The city of Berbera is a fishing town, which is also seen in the presence of a maritime academy and university maritime departments. Berbera does not host any other private productive industries than the port⁶. There was a cement factory in former times, but it is now closed. FAO is currently focusing on improving the Berbera port and has received funding from the Norwegian Government. A need assessment has been made and the plan is to reconstruct the port, clean the bottom of the sea in the harbour, and establish a fuel station. At the time of writing this report, the port infrastructure component had just gone to tender.



Photo: Berbera Port, area close to the FairFishing station

An industry analysis from March 2013 of the fisheries in Somaliland⁷, mentions that each year about 60 tons of fish are landed in Berbera port. The report furthermore describes, “The most common style of fishing in Somaliland is artisanal. This entails fishing in smaller boats, which are between five and 8,5 meters in length, and host around seven crewmembers”⁸. The analysis mentions the huge potential for boosting the sector, proving it by mentioning that the yearly sustainable catch available to Somaliland fishermen is (conservatively

⁵ <http://www.bbc.com/news/world-africa-30513110>

⁶ Interview with City council representative, November 2014.

⁷ Michael Smith: Industry Analysis: Fishing in Somaliland, Shuraako, March 2013.

⁸ Ibid, page 1

estimated) 40.000 tons. 550 tons of fish are supplied to Hargeisa markets on an annual basis, which leaves (at the very least) 39.450 tons of fish available for catch, that could go towards meeting the demand for fresh fish in Hargeisa, other Somaliland communities, and export markets⁹.

⁹ Ibid, page 2

3. Description of the FairFishing concept

3.1 Background and objectives of the project

FairFishing was formally established as an organisation in October 2011 under the name “Somali Fair Fishing”. In late 2013 the organization changed its name to “FairFishing”.

FairFishing’s headquarter is in Copenhagen. The organisation has a Danish board, which includes representatives of the Somali Diaspora in Denmark, and which functions as the decision-making organ of the organisation. A small secretariat is in charge of the daily administration of the project including orientation to the board. FairFishing also has a local office in Berbera, from where the local activities in Berbera are managed. These activities consist of handling and recruiting of FairFishing partners, administration of the fish processing, and administrative and financial management of the station. The Berbera FairFishing office is near the harbour and the FairFishing station, and to the newly opened Partner Supply Unit (more explanations below). The Somali secretary staff and a Danish project manager, who works part time in Berbera, manage the office in Berbera. The local office is answerable to the headquarter in Copenhagen and to the Danish board.

The rationale is that if fishery can become financially attractive as a business and as such available and viable for the impoverished and often unemployed population of Somaliland. This main objective would then be achieved by focusing on the neglected and inadequate fishery infrastructure in Berbera. The argument is, that without adequate and basic fishery infrastructure (including facilities and equipment) the fishermen will not be able to achieve a fishery business. A proper infrastructure would then enable the local fishermen to tap into the domestic fishing potential in the waters off the Somaliland coast where abundance of fish exists. Realising that improving the supply of fish in Somaliland would also necessitate an increase in demand; FairFishing also aims to increase the consumption of fish in Somaliland. The potential for increasing the supply of local fish has been identified by FairFishing, since up to October 2014, there was an import of frozen fish to Somaliland from Mogadishu, and ideally this import could be replaced by local fish given that the proper infrastructure be in place for storing and transporting the fish – this is exactly what the FairFishing station offers. The Somaliland government announced in October 2014, that it would close for import of frozen fish from Mogadishu because of the increase of fish from Berbera Port.

3.2 The phases of the FairFishing project

The years of 2012 and 2013 were the years in which FairFishing got its feet onto the ground in Berbera including establishing relationships with the Somaliland government, local representatives of the fishery sector, getting to know the context, needs and potential for improving the fisheries, and in general preparing the foundation for setting up a fishery station at the harbour in

Berbera. Visits by Danish representatives of FairFishing in those years identified a neglected and inadequate fishery infrastructure in relation to equipment and facilities. There were no alternative storage or freezing opportunities, neither was it possible to get affordable adequate gear (such as nets, motors and so on). Although the boat owners could buy ice, the cost was very high. Most of the fishing equipment was lacking in both quality and quantity. In order to meet the needs of the boat owners and fishermen, it was then decided to open a fishery station, which could provide the fishing community with appropriate and affordable fishing gear, ice and cooling facilities, and possibilities for processing of the fish, and preparing it for further transport to the different market sites.

The station opened in October 2013, and as mentioned this event marks the beginning of this impact assessment, since it is the starting point of creation of results – measured, first of all, as the amount of fish passing through the station. Following the opening of the station, the FairFishing conceptualised the future direction of the project into three phases:

- 1) Strengthening and enabling the infrastructure on land (Oct. 2013-June 2014)
- 2) Strengthening and enabling the infrastructure at sea (July 2014-2017)
- 3) Transition to local ownership (December 2014-2017).

The first strategy phase “infrastructure on land” concentrated on establishing a stable fishery infrastructure in Berbera; including facilities and equipment on shore for catching, handling, processing and transporting of fish. The phase was completed in June 2014 and involved training of its staff to fulfil the services. A goal was furthermore set of processing one ton of fish per day for a month from catch to the market. The goal was reached in September 2014. Although this phase ended in June 2014, FairFishing continues to upgrade and streamline the infrastructure on land.

The second strategy phase “infrastructure at sea” is focused on establishing a stable sea infrastructure, including training of the fishermen on fishing strategies, as well as the improvement of the available equipment. A so-called Partner Supply Unit (PSU) was established and opened in January 2015. The PSU functions as a purchasing unit where the local partners of FairFishing can buy fishing equipment and spare parts, for example nets, hooks, ropes and electronic equipment. The initial available gear stem from three containers of fishery gear provided by FairFishing in Denmark. The gear has partly been bought in Denmark and China and partly donated by Danish fishermen and enterprises. The gear will be sold at cost price including the cost of operating the PSU. The profit will be transferred into a closed account, which later on will be managed by the newly established Producer Organisation FairFishing (POFF). The profit from the PSU will be used to run the PSU (including salary for the PSU staff) to buy more fishing equipment as well as eventually training young men and women in net repairing and production. In the future, FairFishing believes that the PSU will be self-sustainable due to this idea of all profit used for buying more equipment.

The third phase is focused on “transition to local ownership” building on the idea that in the long term, the station and the FairFishing organisation must be self-sustainable and self-administrated by the local boat owners, skippers and fishermen. The idea is that the FairFishing project should be handed over to the local structures in 2017. At this stage, a so-called Partner Organisation FairFishing (POFF) is being prepared, in hope that the POFF will start and continue the self-sustainable, locally administrated and non-profit management of the FairFishing project. The POFF is understood to be a “community of fishermen” representing local fishermen in Berbera, working to ensure the interest of the fishing sector and continue to work for a sustainable and viable fishery in Somaliland after the exit of FairFishing.

3.3 The FairFishing Station

The FairFishing Station is the central element of the FairFishing project. The station is placed in the east end of the Berbera harbour and is composed of five shipping containers. The station functions as a facility where the partners of FairFishing can buy ice to take to the sea. Returning from the sea they can land the iced catch and continue the icing at the station, where the fish is cooled down to below 5 degrees Celsius. Subsequent to landing the fish, the station furthermore offers the services of preparing the catch for sale the same day, or of storing the catch in a freezer for a couple of days before sale, or to process the fish into fillets or other kinds of cutting and then keep it cooled or frozen in order for longer transport or export. The station does not buy or sell fish, but have facilities for catching, watching, weighing, handling and processing. The actual selling and transport of fish is taken care of by the partners themselves or the fish buyers.

Only partners (or partner representatives such as their staff members) of FairFishing can use the station. To get the fish through the station, the fish must meet certain standards of quality – the reason thereof are both in an effort to help the fishermen sell their fish at maximum price, but also to avoid health dangers and also importantly, to maintain a positive image of the station as associated with a high quality. In cases, where the freezers are full, the boat owners will have to sell their fish immediately.

Since September 2014, when FairFishing succeeded in its “proof of concept”, the station has increased its capacity to process almost 43 tons of fish in January 2015.

3.4 Target Groups and stakeholders

The main target group in relation to use of the FairFishing station are the FairFishing partners, also known as the boat owners. The employees of the boat owners: skippers and fishermen are also among the primary target groups. All boat owners and fishermen are welcome and encouraged to join the FairFishing project. At the moment of writing this report (March 2015), FairFishing has 36 partners, who combined own 101 boats, employ 91 skippers and an estimated number of 400 fishermen (the number of both skippers and fishermen fluctuates with the seasonal weather changes). The 36 partners represent about 85% of the

total group of boat owners in Berbera. The boat owners and staff working on their boats are considered the main target groups, but a wider notion of beneficiaries also includes relatives of these, staff of FairFishing station and office in Berbera, and people who in other ways benefit from the project – i.e. foot-fishers and fish sellers.

Additional to the several beneficiaries, FairFishing also works with a range of stakeholders and other people and institutions engaged in the fisheries sector. These are notably the Somaliland Ministry of Fisheries and Marine Resources, the local government in Berbera, as well as other local and international donors and NGOs working to support the development of Berbera, and wider Somaliland – examples of these are Oxfam, Shuraako, and Food and Agriculture Organisation of the UN (FAO).

4. Methodology

The methodology for this impact assessment has consisted of both qualitative and quantitative data collection tools. At the initial stage of the assignment, an overall matrix was developed based on the three overall questions presented above. For each question, the data collection tool and sources of information were defined, as well as indication of which themes to explore under each question. The matrix has guided the data collection and is enclosed as annex I. All data collection tools have been designed to cover the questions and sub-questions outlined in the matrix.

Data collection took place in the period 22nd - 29th November 2014 including six days in Berbera and one day in Hargeisa, the capital of Somaliland. The data collection consisted of a questionnaire, Focus Group Discussions (FGDs), observations, and semi-structured interviews.

4.1 The survey

The questionnaire (annex 2) targeted the three direct beneficiary categories of the project: Boat Owners (FairFishing Partners), Boat crew / fishermen, and FairFishing staff in Berbera (station and office). The questionnaire consisted of a range of quantitative questions focusing on employment and income (before and after participation in the project), Fish and other foods consumption patterns in the household, and condition of the house. Furthermore it had one qualitative open-ended question on the results of the project, and one on any other comments, which the respondent wanted to pass on to the consultant. The open-ended question was intended to get opinions from a large group of beneficiaries on their views of the project, without providing them with pre-defined categories of answers.

The changes in employment and income can be directly included in this report for assessing impact, since the questionnaire asked respondents to indicate previous employment and income levels – a basis for comparison thus exists. The data on fish and food consumption is also presented in this report, although no comparison can be made now, but will be made in the mid-term and end-term impact assessment. Data on “condition of the house” will also be used for comparison in the mid-term and end-term impact assessments, findings are presented in annex 3.

The distribution of the questionnaire was done with the assistance of one local field coordinator and two local enumerators. The consultant was in charge of designing the questionnaire, which was then translated into Somali by the field coordinator. Testing of the questionnaire was done on the first day, with subsequent quality check and feedback to enumerators and field assistant.

4.2 Qualitative data collection methodologies

In addition to the questionnaire, FGDs were carried out with boat owners and FairFishing Staff (station and office). The issues discussed in the FGD centred on the issues presented in the matrix, but it was also a means to discuss other issues, which the participants found relevant in relation to the project. The FGDs were an important tool to engage in discussions with more people at the same time, hence ensuring direct interaction with a notable number of beneficiaries in relatively short time.

Furthermore, four home visits took place where 2 fishermen, one boat owner and one FairFishing station staff were visited and interviewed. The home visits also provided an opportunity to speak with the wives; a strategic way to reach the women affected indirectly by the project. An attempt was made to arrange a FGD for indirect female beneficiaries (spouses of direct beneficiaries); but the consultant was informed, that it would be inappropriate to ask the women to leave their homes. However, since three women are employed in the project (one accountant and two cleaners), a FGD was organised specifically for these three women. An additional objective of the home visit was furthermore to collect data for the production of case descriptions / portraits, which are presented in chapter 6.

Semi-structured interviews were also carried out with different stakeholders. In Berbera, the consult met with representatives of the Gollis University (including the Vice President) YVENCO (NGO), the Maritime and Fisheries Academy, and the City Council. In Hargeisa, representatives from the following were interviewed: The Ministry of Fisheries and Marine Resources, Ministry of Foreign Affairs and International Cooperation, the Danish Ministry of Foreign Affairs, and the non-profit loan fund Shuraako.

Data has also been provided by FairFishing, notably on the amount of fish or catch, which has been processed, stored, and skipped from the station as well as information on the local partners of FairFishing (Boat Owners).

Finally, observations and “on-the-ground” interactions have also been part of fieldwork. This includes in particular two visits to the FairFishing station, where a tour was provided, questions were asked to the staff and in general, the visits were useful to also get a chance to talk and observe the surroundings, including day labourers being on the harbour, fishermen etc.

After fieldwork, the consultant has processed and studied the data collected. Quantitative data from the survey has been typed into excel, whereas the open-ended questions in the end of the questionnaire have been entered into word. All interviews and FGDs have been transcribed into word. The sections in the report presenting the findings follow the three overall guiding questions, and presentation and analysis of data is included where relevant.

The below table provides an overview of how many informants, and of which category, the consultant met with during fieldwork.

Table 1: Data collection: Direct and in-direct beneficiaries

	Boat Owners	Fishermen /Crew	FairFishing Staff	Spouses (female)	TOTAL
Questionnaire / Survey Participants	7	45	4		56
Focus Group Discussions Sessions	2		4 2 station, 1 office, 1 female staff		6
Focus Group Discussions Participants	14		14 Station: 8 Office: 3 Female staff: 3		28
Home visits	1	2	1		4
Home visits: Individuals spoken to	1	2	1	4	8
Total number of direct, and in-direct beneficiaries covered					90*

*Sum of Survey Participants (56), FGD participants (28), and Individuals interviewed during home visits (8)

Table 2: Data collection: Other Stakeholders

	Higher Education Institutions**	Somaliland Government Representatives***	NGO****	Other	TOTAL
Semi-structured interviews: Individuals	5	9	3	1	18

** Gollis University (Department of Business), Berbera (2), and the Maritime and Fisheries Academy, Berbera (3)

*** Berbera City Council (1), The Ministry of Fisheries and Marine Resources (2 in Berbera, 2 in Hargeisa), Ministry of Foreign Affairs and International Cooperation (2)

**** Covers both YVENC0 and Shuraako (non-profit loan fund, not NGO as such).

With regard to sampling of beneficiaries, the reality on the ground was to a large degree determining what was possible and guiding the actual selection for people to be included in the survey. In other words, sampling has been random, and based on who was willing and available for accommodating the two enumerators. Having said this, however the priority was to reach as many fishermen/crew as possible, since both boat owners and FairFishing staff were well covered in the FGDs.

5. Findings: Outcomes of the project

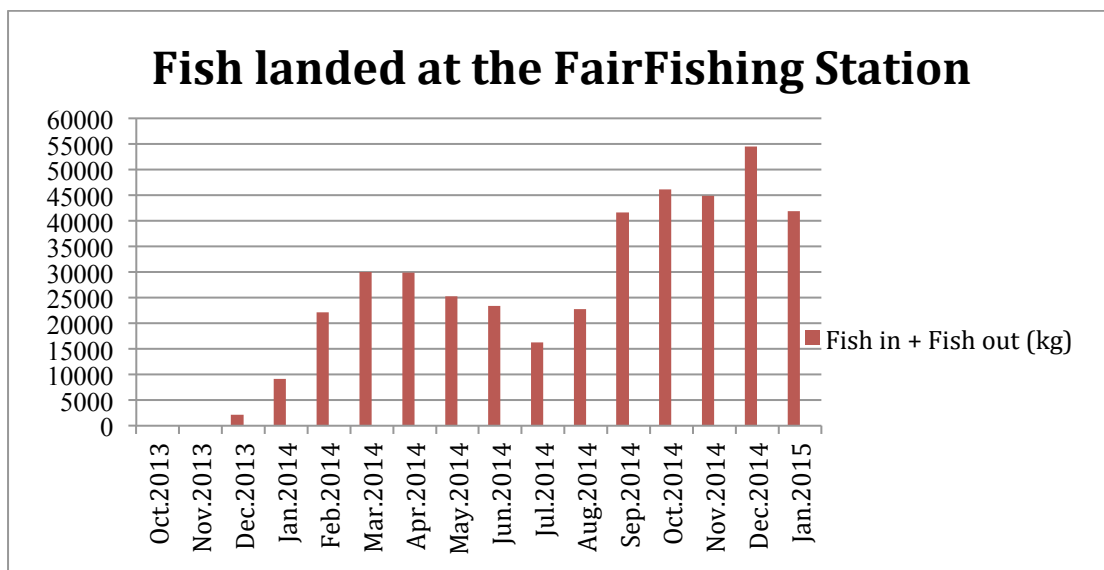
This chapter presents the findings of the impact assessment, and they are structured in accordance with the three overall impact assessment questions outlined in the design. The presentation of results will follow a slightly different structure – first the description focuses on the infrastructural improvements and the results relating directly to these, and then subsequently presenting the results of the fisheries improvements from the beneficiaries’ point of views. Finally, the extent to which the project is likely to have a sustainable impact on poverty reduction is discussed.

5.1 Infrastructural improvement of the fisheries in Berbera

5.1.1 Amount of fish passing through the FairFishing station

Since the opening of the station in October 2013, over 400 tons of fish has passed through the station. As the illustration below shows, in the early phase only very few fish, if any, went through the station¹⁰. December 2013 was the first month to record fish; 2.145 kg of fish went through the station that month. A year later, in December 2014, a notable increase can be seen as 54.545,5 kg fish came through the station.

Figure 1: Fish landed at the FairFishing Station



The illustrations include both “fish in” and “fish out” in a total sum. “Fish in” encompasses the fish, which the station receives and freezes down to stay in the station until it goes to the market in a day or two. “Fish out” covers the fish, which the station receives, weighs and make it fillets to be send out to the market immediately after.

¹⁰ For the two first months there has been no fish according to the data received.

The drop of fish in the station from June 2014 up to August 2014 can be explained by the low season, which is from July to September, where the weather is extremely hot and windy, and where most fishing boats have no or reduced activity.

The illustration also shows an increase in fish from September up to and including January 2015 where it peaks in December 2014. Also this relates to the season. From late November until March is the high fishery season, due to the milder weather. In general, there is a positive increase of the fish passing through the station. Note that the number of partners has not increased much in the period¹¹, so it means that average catch of each partner has increased in the period. If the trend continues, it is expected that there will also be an increase in fish in 2015 compared to 2014.

Table 3: Fish landed at the FairFishing Station

Date	Fish in + Fish out (kg)
Oct.2013	*
Nov.2013	*
Dec.2013	2.145
Jan.2014	9.201
Feb.2014	22.098,5
Mar.2014	30.055
Apr.2014	29.867
May.2014	25.313,5
Jun.2014	23.368,5
Jul.2014	16.308
Aug.2014	22.792,5
Sep.2014	41.646,5
Oct.2014	46.115,5
Nov.2014	44.925
Dec.2014	54.545,5
Jan.2015	41.869
Total	410.250,5

*No data in the beginning period of the Station.

The table to the left shows the individual figures, which are illustrated in figure 1. From September 2014 to January 2015 the landings have minimum been 40 tons pr. month¹². According to a representative of the Ministry for Fisheries and Marine Resources in Berbera, the total catch of the harbour has increased with 60% since the opening of the station.

One of the main benefits for partners of the FairFishing is the access to affordable and reliable ice and cooling facilities within the station. Findings in relation to this are presented in the following.

5.1.2 Availability of ice and cooling facilities

The availability and accessibility of affordable ice is one of the main aspects

of the station, and it has led to several results – notable savings on expenses for ice, improved quality of the fish, and the increased access to markets because of cooling of the fish including boxes for transport.

In general, the cost for ice has been halved, since the price today is 700 SOS/kg of ice, whereas prior to the opening of the station, boat owners paid 1500 SOS/kg of ice. Mainly one company was selling ice to the boat owners before at the price of about 1500 SOS/kg. The company was being referred to as having monopoly

¹¹ In October 2013 there were 27 partners, in April 2014 the number reached 32, and in November 2014 there were 36 partners.

¹² The figure is considered very high when compared with the annual 60 tons of fish reported by the Industry Analysis referred to in chapter 2.

of the ice market, and boat owners were pleased with the fact, that the monopoly had now been broken with the opening of the station. It was furthermore mentioned, that the company has now reduced the price of ice to 800 SOS/kg of ice to get closer to the price of the station.



Photo: Iced Sail Fish halved in two pieces, head and tale removed

The access to cheap and reliable ice also means that boat owners make fewer losses than before. During one of the focus group discussions (FGD), one of the boat owners told *“Before we were worried about fishing storage, we had to throw a lot of fish back to the sea”*. The problem of fish being returned to the sea because of lack of storage facilities at land was highlighted in both interviews and FGDs.

Another way in which the ice plays a crucial role is the time aspect, because not only can more fish be stored, it can also be stored for a long time period. This is reflected in the following quote from a FGD with boat owners: *Previously there was no place to store fish. Now we can store fish for a longer time. (...) Before the station, the storing capacity was low. Now, we don't have to worry about storage. Before we were compelled to hand out the fish to the fishermen.* Another FGD participant mentioned when comparing the now with before *“Since the station opened, storage has been improved. Before a lot of fish was rotting. The station changed a lot of things in relation to the quality and freshness of the fish. (...) The number of boats in Berbera was low, and their level of activity was low”*. Finally, a quote from one FairFishing staff member: *“Fairfishing has made life easier for everyone. They have provided ice boxes for refrigeration. (...) Before there was only one ice provider, everybody was waiting for ice – sometimes even up to a month. Boats had to throw out a lot of fish back to the sea”*.

Official stakeholders such as the Berbera City Council, Ministry for Fisheries and Marine Resources in Hargeisa, and the Maritime and Fisheries Academy also stressed the appreciation of the station's improvement in relation to the ice availability and processing services. According to one representative from the

Maritime and Fisheries Academy, the project has even managed to improve the image of the fisheries industry, as reflected in the following quote: *“One of the main problems of the Somali Fisherman is the storage. Food poisoning is a big problem. And there is no quality control. (...) FairFishing has good ice, good quality control, and good storage. Before the FairFishing, there was not an industry. It was not seen as an industry, people did not want to marry fishermen etc. The last year we have done great to make it an industry”*. The notion that the image of the industry had become more positive after the opening of the station was confirmed in one other source only. One staff member of the FairFishing station mentioned, *“The FairFishing has changed the thinking about fish. There are very many people who are interested in fish, people at the market talk about the station and how it has changed. Also more people want to become fishermen and boat owners. (...) You can see in the harbour, or the station, many many new fishermen, who are just starting...”*

There are probably different perceptions about the status and attractions of being a fisherman or not, but in general, informants referred to the fisherman as a low status job, and only one of those interviewed wanted his children to grow up as fishermen. When asking why people did not want their children to grow up as fishermen, one of the FGD FairFishing staff members explained: *“Most of the fishermen do not earn enough. They are in the lowest position of society. That is why I don’t want my son to become a fisherman”*.

5.1.3 Availability of equipment, gear and nets

In an effort to maintain the quality of the fish during its passage from the sea to the market, FairFishing has introduced cooling-boxes, which the boat owners rent for a small fee. In February the Danish Company Rockwool donated 100 insulation bats, which will also be used to cover the FairFishing partners’ boxes of fish, when being transported to the markets. With the new PSU there has been an increase of FairFishing’s provision of gear in Berbera. In March 2015 the PSU has sold anything from yarn, fishing clothes, gloves, buoys, anchors, and other equipment. The PSU is also the first and at this moment only yarn-shop in Somaliland. Most of the equipment is given by Danish fishermen or companies, or bought in China and Dubai.

5.1.4 Improved market access

Obviously, the increase in quality and size of catch needs to go hand in hand with an increase in market access and demand to realise the benefits of the increased supply. During the stay of the consultant in Berbera, the issue of market access was very much discussed, not least because of a growing stock of seal fish at the station, which could not be shipped, because there was limited demand for it at that time, due to high amounts of that fish available in the market. Efforts were made to link up partners with a potential buyer in Ethiopia, and in general FairFishing is committed to explore opportunities for supporting its partners in gaining market access in Ethiopia. FairFishing has also supplied partners with cooling boxes, which are being used for transport of the fish to, among other places, Hargeisa.

The Industry analysis from March 2013, mentions that there is an unmet demand for fish in Hargeisa: “the market for fish within Somaliland is expanding. Between 1.000 and 1.500 kilograms of fish are reportedly brought to Hargeisa, the capital of Somaliland, on a daily basis during high fishing season, and this supply does not satisfy the demand. Fish vendors constantly run out of fish well before the local markets close each day. No town in Somaliland is located very far away from the coast. Despite this, many markets supplement the local catch by importing fish from Mogadishu¹³ and abroad. This additional fish supply arrives by plane, and are generally all in fillets, which demands a higher price. Nonetheless, they sell rapidly, and the demand remains. For example in Hargeisa, 50% of the daily fish supply is brought in from Mogadishu. If fishing supply chains were improved in Somaliland, this would increase profits in the region and better support market demand¹⁴”.

Sources consulted in Berbera were less optimistic than the Industry analysis referred to above. Some boat owners expressed concern that prices dropped when the supply grew, and in general limited market access was mentioned as a challenge several times in the FGDs. One representative from the Gollis University mentioned: *“The fish market demand is low. This is the main factor why the fishing industry is not developed. The fishing itself is difficult, because of lack of equipment. (...) Anybody who wants to work with the fish should work with the market. The low demand affects all the stakeholders. The low demand is all over the country”*.

As shown above, there are different views of the potential of the market, and the extent to which there is a need to target it as an area of concern. From the point of view of FairFishing, the access to markets is obviously crucial to sustain the station and the project in general. At this stage, market access is not considered a problem, but with the increasing trends of catch (ref figure 1), the continued, and even increased, need to focus on the market is of crucial importance.

This section has provided findings showing how the patterns of fish passing through the station has developed since its opening in October 2013 and up to January 2015. In the following findings will be presented on what the improvements in the fishing infrastructure have meant for beneficiaries.

5.2 Outcomes of the FairFishing project for the beneficiaries

Overall, the assessment has identified a range of positive results for, mainly, the direct beneficiaries of the project: The boat owners, crew (fishermen and skippers) and FairFishing staff, but there are also evidence of other indirect beneficiaries who have benefitted from the project.

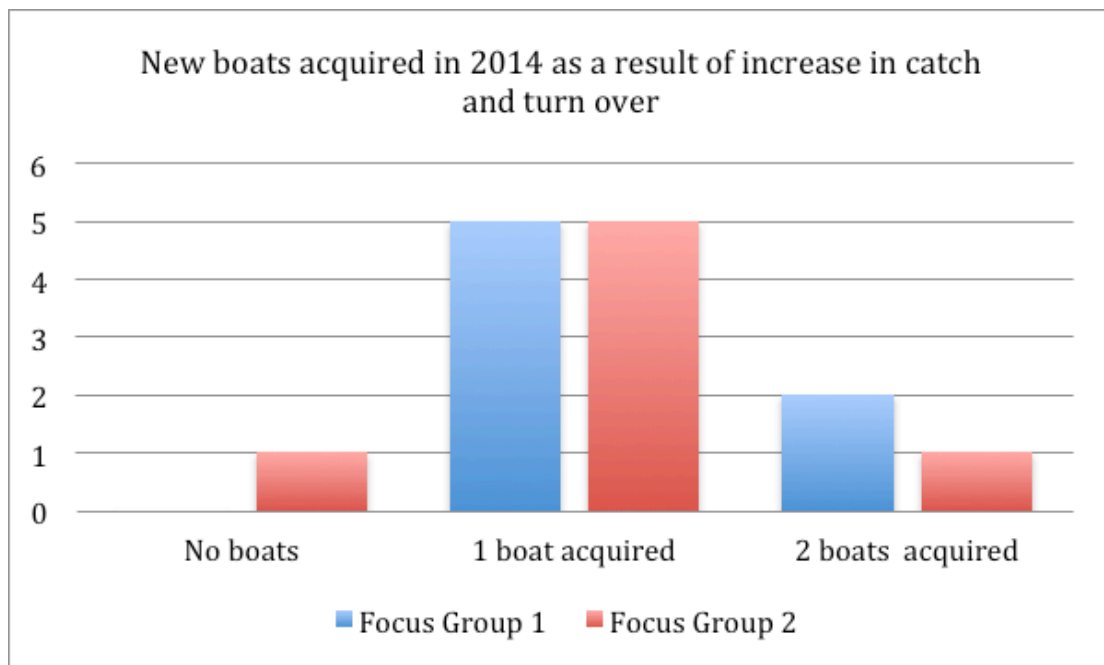
¹³ As mentioned in section 3.1, the Somaliland government has now banned the import from Mogadishu.

¹⁴ Michael Smith: Industry Analysis: Fishing in Somaliland, Shuraako, March 2013.

5.2.1 Increase in catch and turnover by boat owners

The positive developments depicted in section 5.1 are not surprisingly repeated at the level of boat owners / FairFishing partners. Two FGDs were held with boat owners, with a total of 14 participants.¹⁵ The general feedback on the results of the project was that they had all managed to increase their catch, and that most of participants had acquired new boats as a result of this. Out of 7 focus group participants (FGD I), five boat-owners informed that they had purchased one new boat within the last year, the two others had required two new boats each within the last year. The 2nd FGD also had seven participants, out of these five had required one new boat in 2014, one had acquired 2 new boats, and the last one had not acquired any new boats in 2014. Obviously, the expansion of boats enable boat owners to catch more, so the positive developments reinforce themselves. A figure on new boats acquired is presented below.

Figure 2: New boats acquired in 2014



Apart from the acquiring of boats, the size of increase in catch was also discussed. The exact scope of the increase varies; the following quotes illustrate some of the feedback provided by boat owners on the question on increase in catch:

Our catch has increased 2-3 times. (...) We expect to increase our businesses. Never give up. (...) We get a lot of opportunities from the FF station.

My increase in catch has been more than 10 times. I use the increase for setting up a water station, where people can get pure drinking water. I have also saved a lot of money in my account. I also bought two more boats.

¹⁵ Representing almost 40% of the entire partner group.

My business has increased a lot. Previously there was not enough storage. Now we can get enough ice from the station. I think my business has increased with 50%. The increase in income has allowed me to purchase additional three boats.

Since the station opened we have gained suitable storage, cheap ice, and the fish can get processed. (...) Before storage was limited. Now I can store whatever I catch. I don't worry about storage. Sometimes I can bring 2000 kg of fish in one day.

Getting to know the positive effects of the boat owners, the question remains why some boat owners have decided not to become partners of FairFishing. During the fieldwork, the issue was raised in different interviews and FGDs. The number of those boat owners who operate in Berbera and who are not partners of FairFishing seems to range within 6-7 companies, approximately 15% of all boat owners in Berbera. They were not directly consulted, but others have mentioned that some have their own ice production facilities, so they do not need the cooling and ice facilities, which the station offers.

The increase in catch, which has been documented in both the above section as well as in section 5.1, has resulted in increased income for both boat owners and their crew (skippers and fishermen). Data on the level of income for both groups was captured in the survey, which asked respondents about their income levels for both November 2014 and 2012.

5.2.2 Increase in income for all three categories of beneficiaries

As mentioned in the methodology section, a survey was applied as part of the data collection. 56 participated in the survey, of which 7 were boat owners, 45 were crew (fishermen or skippers), and 4 were FairFishing staff.

One section of the questionnaire asked about employment prior to the current employment. Out of the 56 survey participants, 48 indicated that they had employment in the period of 12 months prior to their current employment. Thus, eight more persons are now in employment compared to a period of 12 months before their current employment.

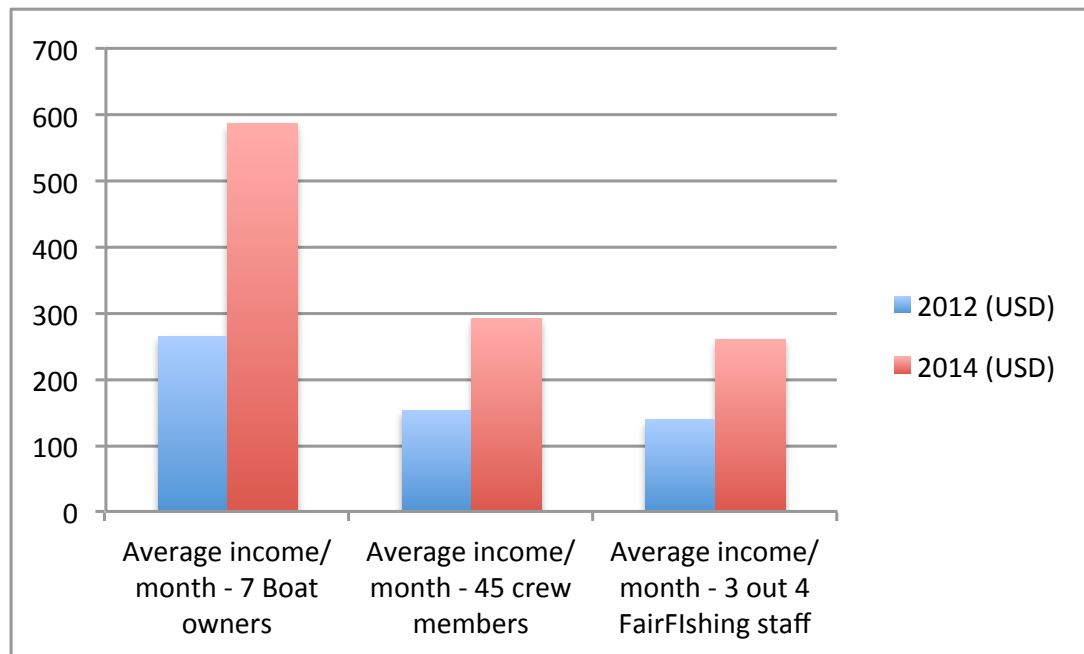
With regard to income levels, out of the 56 participants, 55 respondents have responded that their monthly income today is "higher" than two years ago (which is one year prior to the opening of the station). The last respondent mentioned the salary had remained the same.

The average income for the **seven boat owners** has been reported to be USD 264,29/month for 2012, and 585,71/month for 2014. The income has thus more than doubled in two years – specifically it has increased with **122%**.

With regard to the **45 crew members**, the income increase is also notable. Their salary in 2012 was reported to be on average USD 152,22/month, whereas it has increased to 291,77/month in 2014 – an increase representing USD 139,55 – percentage wise an increase of **92%**.

Finally, with regard to the **four staff members of FairFishing** their salary has also increased. Out of the four respondents only three have indicated their salary level. Out of those three the average salary was USD 138,33/month increasing to USD 260/month in 2014. This represents an increase of USD 121,66 – in percentages **88%**.

Figure 3: Income increase for beneficiaries



The increase in turnover for boat owners has obviously also required additional personnel on board the boats. The increase in need for personnel has not only been met by employing more staff, but also by offering existing staff more work. As one skipper told: *“Before I went out to the sea once a month, now I go four times.”*

5.2.3 Additional results as perceived by beneficiaries (survey results)

One of the final questions of the questionnaire contained an open-ended question asking: “What most important changes have you experienced after the opening of the FairFishing Station? List 3 most important changes.”

Each of the 56 participants had 3 listed items. The following provides a summarised version focusing on the most salient themes. Although the question was designed to contain both negative and positive changes, all the answers were noticeable positive and focused only on positive effects and aspects of the FairFishing project¹⁶.

Increase in income

The most salient theme was that an increase of income was an important change following the opening of the FairFishing Station. In total 44 out of 56 participants

¹⁶ In the formulation of the question no examples were provided to inspire the participants.

listed an increase in income as one of their most important changes. All of the 4 staff members and 7 boat owners participating in the survey listed an increase in income. 34 of the fishermen also mentioned it as an important change. Other fishermen mentioned the income increase indirectly such as *“my life standard grew”*, *“my family’s life standard got higher”*, *“increased family income”*, *“new chances for experiencing different life styles”* and *“I got enough income”*. Out of the 46 fishermen only 4 did not directly or indirectly mention income increase in their listing of the most important changes.

Happiness and courage

The second most prevalent answer was focused on *“becoming happy or satisfied”* as one of the most important changes after the FairFishing station opened. 20 fishermen and 1 boat owner answered that they in some way became happier. The answers included *“I got courage to be a successful fisherman”*, *“I got courage”*, *“I felt very happy with my work”*, *“Felt more happiness”* and *“Got satisfaction.”* Included in this theme category was two more indirectly answers from 2 fishermen who listed *“Important change of work”* and *“Live without worrying”* as most important changes.

Increase in knowledge about fishing and fish

Another salient answer of the open-ended question focused on increase in knowledge. Either the knowledge was directed towards fish, or skills of fishing. 15 fishermen, 1 boat owner and 1 staff member mentioned *“more knowledge on my work”*, *“more experience on my work”* or *“more knowledge about fish”* as one of the most important changes after the opening of the FairFishing station.

Training and improving skills

A different prevalent answer was focused on the *“training of skills”*. Here 4 of the 7 boat owners, 2 of the 4 staff and 16 of the fishermen stated, *“I attended training”* or *“gained many fishing skills”* as one of the most important changes. For many of the fishermen the most important changes both included an increase in knowledge, but also training of their skills. Furthermore, 5 fishermen and 3 of the staff additionally mentioned, *“learned to sew nets”* or *“more knowledge on fishing nets”* as an important change after the station opened in Berbera.

Marriage and other family matters

Not as prevalent answers as the others mentioned, but still remarkable, was that 6 fishermen included *“I got married”* (or as a participant put it *“I got married as a result of an increase in income”*) as one of the most important changes after the station opened. Another theme was that the families of the fishermen were affected in some way. One of the boat owners listed *“taking my children to a private school”* as one of the most important changes. Another boat owner and 3 fishermen listed *“family living standard got higher”* as important change, where 2 other fishermen mentioned, *“family stability”* and *“my family got happier”*.

Enlargement of enterprise and reliability of work

Half of the boat owners (3 out of 7) mentioned that their enterprises had in some way been enlarged and that such was one of the most important changes after the station's opening. Either they described how they had employed more employees, bought another boat or directly listed "*making my business bigger*". In contrast, only 4 of the fishermen stated that one of the most important changes was that they got a reliable, permanent or sustainable work.

Other things mentioned

Some of the less prevalent comments to the open-ended question included: One fisherman stated he "*gained many materials*", 1 fishermen said "*I got a luxury life*" and 1 fishermen stated "*Development for fishing*". Also, 2 fishermen and 1 boat owner listed "*more awareness from FairFishing*". 4 of the fishermen listed that "*I got cheap ice*" as an important change.

In addition to the survey responses a few additional results were also identified through interviews. One fisherman told that his income had increased with 80% and that he planned to make savings so that he could purchase his own boat and set up his own business. One FairFishing staff was building a house for his family and one boat owner had renovated the house of the family.

5.2.4 Improved skills of fishermen and FairFishing Staff

The issue of skills development has been mentioned above as one of the areas in which some beneficiaries have expressed positive results. The same finding came out in the FGDs with FairFishing staff. The following presents some examples of how people have expressed improving skills as part of what they got out of working for FairFishing in terms of skills development:

I gained a lot of skills, I improved my skills in accounting, I also expect to use and learn computer skills in the future.

Before I was also a manager so I am doing the same job now. But everyday I gain a lot of experience.

When the station opened I started as a watchman; now I process fish. I learned a lot of new things and gained a lot of experiences.

Before I was a fisherman but I did not know anything about the materials, storage, processing. I learned a lot of things.

I work as an Electrician. I have increased my skills and knowledge by getting to know new equipment. Also my income has increased.

In general all staff members met with expressed satisfaction about working for FairFishing. There are three women employed by the project; two work as cleaners, the last one as accountant. As mentioned earlier, a FGD was organised with these three women. They represent a noticeable minority in Somaliland where only few women are working. Two out of the three were married, and in

both cases they told that they husbands and families approved of them working. Two furthermore mentioned, “*My family is proud of me to work*”. For one of the women, it was her first job whereas the two others had worked before.

5.3 Consumption of fish

Although not clearly stated among its objectives, it is considered a positive side effect of the project if the consumption of fish can be boosted in Berbera and Somaliland at large. First of all, it provides an excellent opportunity to increase market potential, while it also has additional advantages in terms of food security and nutritional value. With this in mind, the questionnaire contained a section on “Fish consumption” asking households about the number of meals containing fish per week, as well as which types of meat are most consumed in the household. The rationale for including these questions is to have a baseline foundation against which to compare when the same questions will be applied in the mid-term review and end of project final impact assessment (2017)¹⁷.

With regard to the first question of “How many meals per week (average) served in the household contain fish” the answers were:

Table 4: Household consumption of fish

No of meals/week containing fish	Answers (total 56)
0 meals/week	0
1-3 meals/week	29
4-6 meals/week	20
7-9 meals/week	5
Above 10 meals/week	2

As can be seen from the table, majority (26) of households eat 1-3 meals/week containing fish, but a noticeable large part (20) eats fish 4-6 meals/week.

According to the report on the fishing industry, cultural norms in Somalia and Somaliland have framed fishing as an inferior industry in the past. This has also meant that fish meat was considered to be of a ‘lower status’ than others. However, according to the report, there has been a shift that has seen a greater acceptance of fish and fishermen. Much of this has to do with Somalis increasingly recognizing the health benefits of eating fish. Local doctors, the government, the United Nations Development Program (UNDP), and the United Nations Food and Agriculture Organization (FAO) have promoted the healthfulness of fish. In such a volatile environment that is often affected by drought and famine, the importance of dietary diversity is gaining salience¹⁸.

¹⁷ The selection of respondents is somehow biased because they were selected as beneficiaries and therefore already working in the fishing industry. For some the fish is part of their salary, and not something they have prioritised to buy. Furthermore the awareness of fish and its nutritional assets are probably more familiar to this group than the population at large.

¹⁸ Michael Smith: Industry Analysis: Fishing in Somaliland, Shuraako, March 2013.



Photo: Stored, filleted portions of Sail Fish, November 2014

When comparing the position of fish in relation to other types of meat the following picture emerges¹⁹:

Table 5: Ranking of different types of meat in the household

No of households which ranked most consumed meat	
Ranked as no 1	Goat: 30 Fish: 25 Cow: 1
Ranked as no 2	Fish: 29 Goat: 24 Camel: 2 Other: 1
Ranked as no 3	Other: 26 ²⁰ Camel: 19 Fish: 2
Ranked as no 4	Camel: 26 Other: 12 Cow: 1

¹⁹ Based on the question: "What is the main type of meat served in the household?"

²⁰ In most cases, the "other" refers to chicken.

As can be seen from the table, goat is the main type of meat consumed, but fish is relatively well positioned also, since 25 out of 56 households have ranked it number 1, and 29 out of 56 households have ranked it as number two.

Several respondents, in both interviews and FGDs, also noted the observation that consumption of fish had increased in the area. This was confirmed by sources in the Ministry of Fisheries and Marine Resources, as well as a local NGO and the Maritime and Fisheries Academy. In this way, FairFishing has come in at an opportune time to further support the on-going process of increased fish consumption in Somaliland.

5.4 Other benefits and results for the wider community

Reflecting on the above descriptions of the positive developments raises the question as to whether these positive developments could mean possible negative effects for others. At a first glance there could be one group of the smaller fishermen and the so-called foot fishermen. Would there be a risk that these would be sidelined in the process of boat owners increasing their businesses?

The consultant did not talk directly with any of the small fishermen but the issue was raised in FGDs with FairFishing staff and boat owners. The answer was that the boat owners and small scale fishermen were using different markets, and that they sold their fish to the local restaurants and markets in Berbera, whereas the catch of the boat owners would mainly go to markets in Hargeisa, therefore the foot fishermen were not negatively impacted by the increase in catch by boat owners. As expressed by one staff member from the FairFishing station *"The small fishermen will not be affected, because the fish they catch is taken to other markets. There is no competition"*. One of the boat owners explained their situation in the following way: *"A lot of fishermen still go out on their own. They supply the Berbera market. They don't store their fish; they go directly and sell it in the markets in Berbera. Those fishermen only use their small boat, they bring their fish to the restaurants"*.

One positive side effect mentioned in an interview was the fact that small-scale fish street vendors had increased in numbers during the period of the FairFishing. Since these would often be women, the increase in fish sales has an indirect positive effect on female income generation opportunity in the area.

Overall, this assessment has not identified any negative unexpected side effects of the project. On the contrary, there seems to be consensus that FairFishing has brought only positive developments to Berbera. The timing seems to be an important factor also, because FairFishing came at a time, when there were several initiatives at play to improve the fisheries, but apparently none of these had taken off at the time of the arrival of the project. This was mentioned as part of his appreciation of FairFishing in the following way by a Berbera City council representative: *"FairFishing came at a time, when they were really needed. It was at the right time, we really appreciate. (...) FairFishing was the first to do*

something in support of the fisheries. Some others came here to get information but we never saw them again. (...) FairFishing did a lot of things for positive change. We are very thankful that the Danish FairFishing has supported us”.

The FairFishing started operations at time when other actors were also increasingly becoming interested and engaged in fisheries in Berbera. At the time of the country visit (November 2014), a FAO funded programme in support of rehabilitation of Berbera port and provision of equipment was under way, and another EU funded programme with the aim of providing cold storage facilities in a range of towns along the Somaliland coast was also in the pipeline. It is thus expected that the efforts and positive results of the FairFishing can both reinforce and be reinforced by these supplementary interventions. For example the Vice Minister at the Ministry of Fisheries and Marine Resources mentioned the Fairfishing station was regarded a model by the ministry, and that they were appreciative of the methodology applied by FairFishing: *“The methodology they are using is amazing. The price is fair but is not free. They now want to establish an organisation for the clients. We send a lot of delegations to the see the station because it is a model.”*

5.5 A sustainable impact on poverty reduction?

As the two previous sections (5.1 and 5.2) have demonstrated, the FairFishing project has led to positive developments in various ways and for different target groups. The question in this section assesses to which extent these developments are likely to continue beyond the project. As was also described in chapter 3, FairFishing is in the process of establishing a sustainability structure, which both consists of the Partner Supply Unit as well as the Partner Organisation FairFishing. Combined these two structures are expected to take over the management of the FairFishing project. FairFishing is currently in various ways preparing the partners for these possible future changes. These changes require some new mind-sets and time for the partners to see themselves as part of a cooperation-structure jointly with other boat owners.

The issue was also discussed with the boat owners during the FGDs. In general, boat owners sincerely want the station to continue its operations. There was, however, a hesitation towards the idea of self-management and ownership, with different arguments. A station staff member mentioned the following: *“We are expecting FF to continue its work. We are not expecting the community to engage or take over the running of the station. (...) We hope the station will continue in the future, to become bigger and better.”* Another argument, also mentioned by a station staff member, was related to the financial aspects of maintaining the station: *“I am not expecting that we can run the station. The costs now only cover the costs of electricity and ice. FairFishing pays all the salaries. The main income from the fishermen is used for electricity. If we can get a solar, it will make it possible for us to run it”.*

The high costs for electricity to run the station has led FairFishing to explore alternatives such as solar panel solutions. There seems to be consensus that the

current price of ice will be difficult to maintain in the future if electricity costs are not being reduced. It also means, that a cheaper alternative solution to the current spending on electricity will enhance sustainability of the project. In this relation it should be mentioned that the consultant was informed by representative from the Ministry of Fisheries and Marine Resources that Somaliland currently is at negotiations with Ethiopia about provision of hydro powered electricity. In case hydro powered electricity becomes available in Somaliland it would most likely entail reduced cost price for electricity in Berbera.

There are thus two main challenges in relation to sustainability: Financial and organisational. As shown above FairFishing is currently trying to find solutions to both of these challenges.

On the other hand a range of factors have been identified, which have positive potential for enhancing the sustainability of the project.

First of all, the increased consumption and demand for fish, which has been identified during the assignment. This indicates that there is a market driven foundation for the project, and in that sense the services of the station are expected to be in continuous demand.

Secondly, there is a strong interest among the partners to maintain the station. Time will show whether this wish is strong enough to actually overcome the hesitations towards the self-management model.

Thirdly, the station and its way of functioning is very well supported and backed up by the Somaliland government. The government granted the space for the station for free in the first place, and will remain to do as long as the station is working. The Ministry of Fisheries and Marine Resources, which is currently located in Hargeisa, will move to Berbera in 2015 according to a representative from the ministry. In sum, there is a positive political environment in support of the station, which is expected to continue with a new management structure. Furthermore, the project is fully inline with national government priorities for the sector, for example in relation to Somaliland's National Development Plan (2012) whose priorities for the fisheries comprise (among others) "Establishing cold chain facilities from producing ports to markets."

As mentioned in chapter 3, the project expects to phase out in 2017. It means there still remains two years for FairFishing to solve the sustainability challenges as described above. The extent to which this is taking place successfully will be followed up during the mid-term review and will furthermore be central to the end-of-project impact assessment.

The following chapter provides two case stories aiming at presenting some of the individuals of the beneficiaries' category.

6. Individual case stories

Basic Data

Name: Hinda Hassan Ahmed

Age: 25 years

Family: Married and mother of one child

Role in FairFishing: Employed in March 2013 as accountant in the office



What do you think about FairFishing?

I find it very nice, it is very nice to work here. It is a better work place than others, here I get help. Sometimes we get free fish. Before I was a volunteer, I wanted to get a real job. I saw the vacancy note in the newspaper, they were looking for a female accountant. I applied, I went for interview and I got the job.

I have increased my computer skills, I make efforts and work hard. In the future I hope to continue working for FairFishing. I would like to be involved with office management.

My husband is very happy of me working, so is my family, they are proud of me. I also contribute to my parents.

What has come out of FairFishing ?

Cooling , storage facilities and better ice.

The project has also led to more employment.

Basic Data

Name: Alkarun Hassan Adam

Age: 26 years

Family: Newly married (May 2014), no children

Role in FairFishing: Works as a skipper with different boat owners



What do you think about FairFishing?

My income has increased. Now I can go to the sea more often, 3 or 4 times a month, before we did not go out that often. I get paid per trip, but I get paid more per trip than before because we catch more fish, and we catch more fish because of the ice. Before I earned maximum 200 USD / month, now in a high season I can earn up to USD 900 / month.

In the future I would like to be a boat owner. I am skipper today, have been so for three years. I am self trained, nobody in my family was a fisherman. I would like my son to be a fisherman. I will train him and give him a lot of advice.

What has come out of FairFishing ?

There is a big difference. Before there was no storage. Ice is cheaper now, there was no availability of such ice before. Before the station opened, there was no market, there was no time to get to the market. Now they can keep the fish fresh and maintain its quality.

7. Conclusion

As this report has shown, the FairFishing project has within a relatively short time period managed to create a range of positive results for its beneficiaries. The station, referred to as a model by the Somaliland Ministry of Fisheries and Marine Resources, is highly appreciated by its partners who represent 85% of the total group of boat owners in Berbera. The FairFishing has both been an initiator of positive changes, but it has also come in at a time where various other actors were involved in investing and improving the fisheries in Berbera.

The boat owners, crew (skippers and fishermen) and FairFishing staff all report an increase in their income as compared to one year before the opening of the station. The increase is furthermore noticeable, in the range of 88% - 122%. This increase is explained by the increased catch, which again involves a higher turnover and more work for crew. In addition to the increased income, a range of other positive results have also been identified, including a sense of being encouraged and happy, learning new skills and knowledge about fishing, getting the ability to build a house, and get married.

Another aspect where FairFaishing has played a positive role is in relation to the quest for international cooperation by the Somaliland authorities. The Berbera City Council representative commended the efforts by FairFishing from this perspective. He mentioned there is a general wish in Somaliland to gain international recognition as an independent state, and linkages with foreigners can help in brining development to Somaliland: *“We are a government with no international recognition. We have been like in prison for 23 years. Now our friends are the foreigners (like you) who come to see how we are doing. We need your support, to connect universities with your universities etc.”*

Now that FairFishing has established itself a well functioning and results-creating organisation, it will be of crucial importance that the initiatives for ensuring financial and organisational sustainability become successful. The organisation has already proven its capacity to solve challenges in flexible, effective and innovative ways, so it provides a strong foundation for also tackling the sustainability challenges in the time to come.