

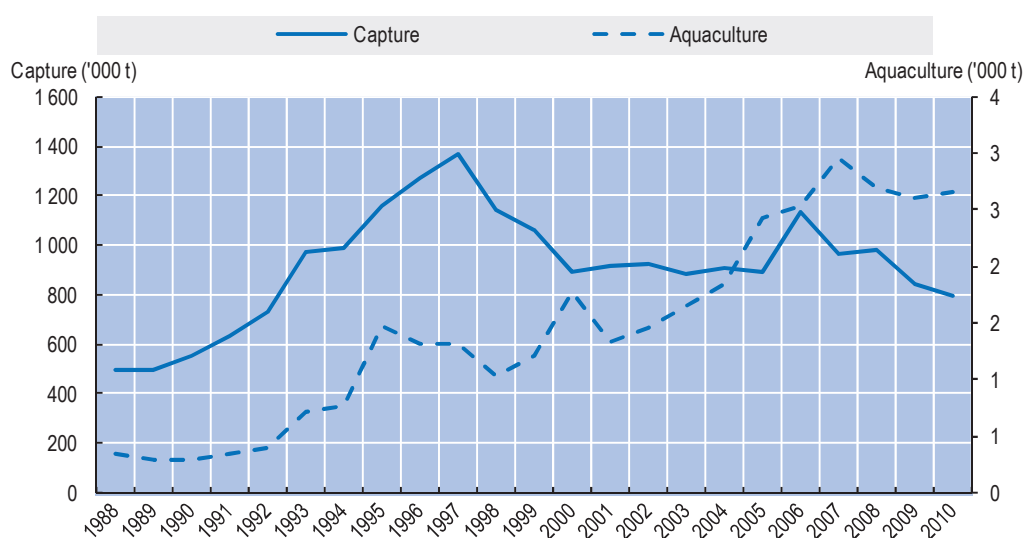
Chapter 31

ARGENTINA

Summary of recent developments

- There was a slight declining trend in total landings from 2009 to 2011, from 776 000 to 733 000 tonnes.
- The Individual Transferable Quotas (ITQ) system established in 2008 is fully operational.
- Argentina has three National Plans of Action: National Plan of Action to Prevent Deter and Eliminate Illegal, Unreported and Unregulated fishing, National Plan of Action for the Management and Conservation of Sharks (sharks, rays and skates) and the National Plan of Action for Reducing the Interaction of Seabirds with Fisheries in the Republic of Argentina. A workshop for monitoring the implementation of The National Plan of Action for the Management and Conservation of Sharks (sharks and skates) took place in 2011. The “National Plan of Action for Reducing the Interaction of Sea Mammals with Fisheries in the Republic of Argentina” is currently under preparation.
- There is an MSC certification for the scallops, Argentine anchovy and longtail hake fisheries (approved in May 2012).
- The general fisheries information system has been optimised and modernised. It has enabled better integration and cross-linking of fishing activity information, such as catches (catch reports), landings (landing official documents), processing (conversion factors), VMS, fishing gears, selectivity devices, characteristic of vessels, and permits.
- In 2011, fishing product exports reached 471 000 tonnes and USD 1 490 million, with growth of 3% and 12.72% respectively compared to 2010. The value in 2011 was the highest of the last decade. Exports are relatively stable in terms of volume, but the tendency is clearly growing in terms of value. The high levels of shrimp capture largely account for these outcomes.

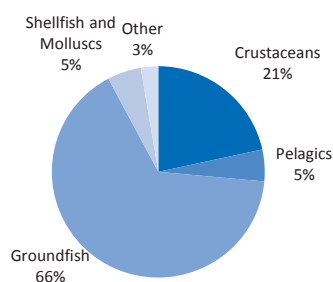
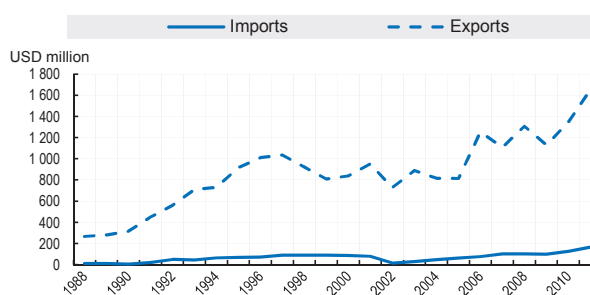
Figure 31.1. Harvesting and aquaculture production



Source: FAO Fishstat database.

Box 31.1. Key characteristics of Argentinean fisheries

- Ground fish accounted for the largest share (66%) of Argentinean landings by value in 2010, followed by crustaceans (21%), shellfish and molluscs (5%) and pelagics (5%). (Panel A)
- Argentinean fish exports have been increasing since 2009 and 2011 marked the highest recorded value of the last decade. Exports were relatively stable in terms of volume, but the tendency is clearly increasing in terms of value. Exports of shrimps, hake and squid products have been the most significant. (Panel B)
- Fish imports have also been increasing since 2009 while the value has been less than one tenth of fish exports. In 2011, prepared or preserved fish were the main imported products, accounting for 63% of total import volume, fresh or chilled fish, excluding fillets, for 16%, and prepared or preserved seafood for 6%. (Panel B)
- In 2011, the total number of vessels slightly increased (3.3%) from 2005, of which 603 vessels were the marine fishing vessels. Total employment in marine fisheries (fishing and processing) was 23 044 people in 2010 and 22 583 in 2011. About 10 000 people work in inland fisheries. (Panel C)

Figure 31.2. Key fisheries indicators**Panel A. Key species landed by value in 2009****Panel B. Trade evolution****Panel C. Capacity**

	2006	2011	% change
Number of fishers	16 561	15 842	-4.3
Number of fish farmers	..	1 050	..
Total number of vessels	964	996	3.3
Total tonnage of the fleet	188 729	179 790	-4.7

Legal and institutional framework

Fishing activity is regulated by Law 24922 — Fisheries Federal System (1998). (www.infoleg.gov.ar). At the national level, the Undersecretariat of Fisheries and Aquaculture, dependent on the Agriculture, Livestock and Fisheries Ministry (www.minagri.gob.ar), is responsible for fisheries administration. Each of the five maritime coastal provinces has its own fisheries administration authority. According to the Law, living resources in inland and coastal waters adjacent to the coasts — up to twelve miles measured from the baselines stated in the corresponding national law — are under the jurisdiction of the five maritime coastal provinces. Provinces have jurisdiction over the resources in terms of exploration, exploitation, management and preservation within the federal framework. Marine living resources found in the waters of the Argentinean Exclusive Economic Zone and the Argentinean continental shelf from the twelve nautical miles on are the exclusive jurisdiction of the State.

The Federal Fisheries Council (CFP) was created by this law as the superior authority. It is comprised of ten members: a representative of each of the maritime coastal provinces and five representatives at the national level, including from the foreign affairs and environment units. The chairman is the Undersecretary of Fisheries and Aquaculture (www.cfp.gov.ar). The CFP, among other functions, is responsible for establishing the national fisheries and the research policies, for planning the national fisheries development, for setting annual catch quotas for vessel, species, fishing areas and type of fleet, and setting total allowable catch (TAC) for each species (it is stated for all the species distribution area, irrespective of the jurisdiction) according to the maximum sustainable yield, in accordance with data provided by the National Institute for Research and Development of Fisheries (INIDEP).

Commissions to analyse and monitor the industry have been created and these work as advisors (hake, southern blue whiting, Patagonian toothfish, squid, shrimp, scallop, anchovy — Patagonian stock —, longtail hake, southern king crab). The public sector, the private sector related to the corresponding species fishery, and the INIDEP take part in these commissions.

The Republic of Argentina and the Oriental Republic of Uruguay share a fishing zone that is managed by the Technical Mixed Commission of the Argentinean-Uruguayan Maritime Front (www.ctmfm.org).

With respect to aquaculture, each province, according to Section 124 of the 1994 National Constitution is the owner of its natural resources and the competent authorities regulate this sector.

With regard to inland fisheries, there is no specific law at the national level. The Commission for Inland Fisheries and Aquaculture (CPCyA), within the Agricultural Federal Council (CFA), was created to harmonise management policies related to the watershed and co-ordinating the different interests of the provincial managements. Small-scale artisanal fisheries are very important as a source of employment for coastal populations, and as fish providers to coastal communities and other areas to which seafood products are not distributed. Subsistence fishing contributes significantly to the survival of the coastal population with low incomes.

Capture fisheries

Performance

Total landings from 2009 to 2011 showed a slightly declining trend from 776 000 to 733 000 tonnes with an average of 758 000 tonnes. Only five species are responsible for around 70% of total annual catches (hake, squid, shrimp, southern blue whiting and longtail hake). Hake is under restrictive measures since the crisis that started at the end of the 1990s and landings have been stabilised at 280 000 tonnes per year.

Landings of shrimp have been increasing since 2006. In 2010-11, landings were the highest in the last eight years.

Landings of squid have not recovered (250 000 tonnes in 2008).

Inland fisheries in Argentina consist primarily of *sábalo*. In the last several years, landings were 20 000 tonnes/year, mainly in the Paraná River in the provinces of Santa Fe and Entre Ríos. Both provinces maintain catch statistics. In addition to *sábalos*, the other species fished are boga, armado, yellow catfish, catfish, manguruyú, large fresh-water catfish (surubí), dorado, pacú, patí, rays, armado, chanco, river salmon, manduví, pira para, piraña, whose landings at the global level do not surpass 20% of the value corresponding to *sábalos*.

About 90% of the landings species are exported. Landings of squid and hake have been low in the last years, coupled with a drop in prices, and sales income *vis-a-vis* the high production costs (manpower, oil, stowage, paper) place the firms in a difficult position. The high level of landings of shrimp has resulted in low prices. The competitiveness of aquaculture products (*pangasius*, *vanamei*) contributed to worsening the situation amidst the international crisis and retracted demand.

Sábalo is mainly exported. In the last several years exports of *sábalo* were 15 000 tonnes.

Landings by port

More than 50% of marine species landings continue to be concentrated in Mar del Plata port. With the exception of Ushuaia, whose share has clearly decreased, other ports have maintained their ranking. The impact of the international crisis and the increase of domestic costs — especially manpower, oil and stowage — affected the southern ports in particular (Puerto Madryn and Deseado).

Fleet

In 2011, the maritime fishing fleet was composed of 603 vessels, 393 of which had only provincial licenses, 226 both national and provincial licences, and the others having only national licences.

Total employment in marine fisheries (fishing and processing) was comprised of 23 044 people in 2010 and 22 583 in 2011. About 10 000 people work in inland fisheries.

*Status of fish stocks***Table 31.1. The status of Argentinean fish stocks**

Patagonian toothfish	The spawning biomass of 2011 increased slightly above the targeted spawning biomass: 30% of virgin spawning biomass. Fewer vessels have been allowed to catch targeted species and ITQs have been assessed so that the stocks exploitation appeared to be in a better situation.
Longtail hake	In the period 2009-2010, there were no changes in the stock of longtail hake. The spawning biomass was closed to the limit reference point. The spawning biomass trend has shown fluctuations that have had an impact on captures.
Southern blue whiting	The total biomass and the spawning biomass have shown a decreasing tendency, reaching levels significantly lower to those estimated at the beginning of the fishery.
Argentine hake North 41°S	The total biomass and the spawning biomass have increased in 2010, 3% and 10% respectively, but their values are under the biological references limit and objective (130 000 t and 200 000 tonnes respectively).
Argentine hake South 41°S	The spawning biomass did not attain the biological references points (limit and objective of 400 000 tonnes and 500 000 tonnes respectively).
Whitemouth croaker	Capture values must not be increased and the management of this species must be carefully checked due to the fact that there are too many juveniles in landings.
Shrimp	The available biomass that can be fished by coastal and offshore fleets has remained stable in the last five years (2007-2011). The landings in 2011 were an historical record. Explanatory models for the mortality and exploitation rates have been developed. These models helped in the search for possible biological reference points to be used in the implementation of a management plan. Permanent or provisionally closed areas have been applied to three jurisdictions (two provincial and one national). This, together with a decrease of the fishing pressure during the spawning season, has helped maintain a stable exploitation state.
Squid	There are two management units (north and south of the 44°S) and four stocks (SSP, SDV, SBNP and ADP) that are evaluated annually. Evaluations are done in real time, with weekly updates during the fishing season (January-August). The available biomass to be caught increased in 2012 with respect to 2011 in the southern area; in the northern area, the available biomass has reached an historical low level.
Scallop	Fishing was restricted in the northern sector during 2010-2011 given that recruitments were detected at the seabed. No changes have been observed in the total and commercial biomass in several unit management areas of the southern areas; in other units, decreases have been observed.

In relation with inland fisheries, according to available reports published in the last five years, the present situation of the target stocks is quite good. Exploitation levels can be qualified as moderate if compared to other rivers in the world.

*Management of commercial fisheries***Table 31.2. Management instruments**

Output controls and supporting technical measures	Input controls and supporting technical measures
TACs	Since 1998, no new licenses are granted at the national level.
ITQs (hake, longtail hake, southern blue whiting, scallops and Patagonian toothfish)	Replacement of vessels. Only in the cases when the fleet capacity is not increased.
Catch authorisations (species without ITQs system applied)	It is compulsory to use selective fishing gear for shrimp and hake (protection of juveniles).
	Vessels size limitation for fishing in specific fisheries and zones.
	Restrictions on fishing gear and fishing areas for some fisheries.
	Limitation of fishing days for some fleets in some fisheries.
	Limitation on the time of day when the catch is made depending on the type of fishing gear and the target species.
	Fishing seasons limits.
	Limitation of maximum allowable landings of by-catch (chondrichthves).
	Compulsory by-catch mitigation measures in longline fisheries (birds).

By fishery

Patagonian toothfish	ITQs Surimi fleet: Annual maximum of incidental catch (1% of the TAC).
Longtail hake	ITQs.
Southern blue whiting	ITQs
Hake North 41° S	Limitation on the number of fishing trips (boats with authorisation to catch hake) and capture per boat. Compulsory use of selective devices (protection of juveniles).
Hake South of 41° S	ITQs Compulsory use of selective devices (trawlers). Enlargement of the closed area (protection of juveniles).
Whitemouth croaker	TAC Closed area in the Argentinean-Uruguayan Common Fisheries Zone (cartilaginous and bony fishes) from December to February Closure area (protection of juveniles) in Buenos Aires province. Closed spawning area and restrictive effort (south of Buenos Aires Province).
Chondrichthyes	Closed areas and restricted effort (protection of juveniles and spawning area). Landing limits (sharks and rays) equivalent to 40% of the total catch per trip. When the percentage of sharks in a landing exceeds the limit, the vessel shall move to another area of operation. Obligation to return to the sea sharks of more than 160 cm (non commercial fishing). TAC for rays and narrownose smooth-hound (Argentinean-Uruguayan Common Zone).

Table 31.2. Management instruments (continued)

Shrimp	Permanent closed area (North of Gulf of San Jorge). Control of the fishing effort especially at the beginning and end of the fishing season (juveniles' protection and spawning areas). Compulsory use of selective devices (total fleet).
Squid	The fishery management is based on the opening and closing of the different management units.
Patagonian Scallop	TAC by management unit. Annual catch authorisation by vessel. Spawning areas protection (all the management units). Fishing prohibition in areas where more than 50% of the specimens are not of commercial size.

Other measures include restrictions with regard to the minimum size of catches. Additionally, permanently closed areas have been enlarged or modified in accordance with the state of the resource.

To fight illegal, unreported and unregulated (IUU) fishing, a surveillance system of catches has been developed — in addition to the obligations stated by the buyer countries — that affects not only fishing products for export, but also products for the domestic market.

In 2011, a workshop took place on the monitoring the implementation of The National Plan of Action for the Management and Conservation of Sharks (sharks and skates). The trade of fins obtained while the rest of the animal is discarded is prohibited in the EEZ as well as in the Argentinean-Uruguayan Common Fisheries Zone. The use of “bicheros” is prohibited. It is compulsory to discard living sharks of more than 1.60m. In the Argentine EEZ, only a by-catch of up to 40% of skates/sharks per fishing trip is authorised. Once this allowance is met, the vessel must move to another fishing area.

Common measures are used in the Argentinean-Uruguayan Common Fisheries Zone such as total allowable catch for some species, closed areas restrictions for some fishing gear, prohibition of fishing gear for some species, catch assignments, temporary closed areas, and restricted effort areas for some vessels.

As a member of the Commission for the Conservation of Antarctic Marine Living Resources (CCMLAR), Argentina applies its measures — incorporated in national legislation — to vessels authorised to operate within the Convention area.

According to the agreements of the Inland Waters and Aquaculture Commission, the Ministry of Agriculture, Livestock and Fisheries sets the annual catch assignments for exports, which are assessed by the provincial authorities within the corresponding territories. Catch quotas and export assignments have been assessed for sábalo exports. Precautionary catch quotas and export assignments are also assessed for other commercial species, especially boga, tararira and surubí. Exports of these three species are discouraged.

There have been closures to access to inland fisheries based on CFA agreements, particularly in the subwatershed of Paraguay-Paraná Rivers and there have been no new authorisations for cold storage plants. Another tool used by the provinces is to limit the granting of fishing licenses.

Within the provinces there are regulations on authorised fishing gear and minimum sizes of capture for all commercial species. There also are seasonal closures and, in some cases, individual catch assignments per species.

There are regulations to protect artisanal inland fisheries by limiting the number of licenses and by avoiding the industrialisation of the activity.

Research projects (inland waters) include the following.

- Surveys in the upper region of the Paraná (Chaco and Corrientes - Undersecretariat of Fisheries and Aquaculture).
- “Evaluation of ichthyc resources of low river Uruguay and the inner Río de la Plata” (CARP-CARU-SSPyA-DINARA).
- “Conservation of ichthyc fauna and of the resources of the river Uruguay” (CARU-SSPyA-DINARA).
- “Sábalo Project in the lower Paraná Basin.”
- “Piraguazú in upper Paraná River and lower Paraguay River (FAO).

Access

There are no arrangements concerning access of foreign vessels to Argentine fisheries. Foreign investment is allowed under the establishment of national enterprises (these are called local enterprises with foreign capital).

Management of recreational fisheries

Recreational fishing, associated with tourism, is increasing in economic importance. Each province has specific regulations for this activity in which it is established how many fish per species can be fished per fisher, the minimum size of catch per species, and permitted fishing gear.

Monitoring and enforcement

The general marine fisheries information system has been optimised and modernised to enable more and better integration and cross-linking of fishing activity information, such as catches (catch reports), landings (landing official documents), processing (conversion factors), VMS, fishing gears, selectivity devices, characteristic of vessels, permits, etc. The use of video cameras onboard with continuous recording in the whole commercial fleet is mandatory.

Boarding fishing vessels for surveillance purposes on the high seas has been intensified in collaboration of the Prefectura Naval Argentina to verify *in-situ* the operations, gears and selective devices control of fishing vessels.

Data loading (catch reports and landing official documents) has been streamlined via a restricted website. It enables rapid availability of data necessary for cross-linking.

A new high-definition mapping structure has been implemented to increase the accuracy of the analysis of fishing vessels position in the EEZ.

Multilateral agreements and arrangements

- Member of CCAMLAR.
- Treaty of Rio de la Plata and its Maritime Front (Argentina and Uruguay). Administrative Commission for the Rio de la Plata (CARP) and Binational Technical Commission for the Maritime Front.
- The River Uruguay Executive Commission (CARU) (Argentina y Uruguay). Mixed Argentinean-Paraguayan Commission of the Paraná River (COMIP).
- CONVEMAR.

- Agreement to promote compliance with international conservation and management measures by fishing vessels on the high seas.
- Code of Conduct for responsible fishing.
- Agreement on the Conservation of Albatrosses and Petrels.

Aquaculture

Aquaculture production remains low with almost 1 050 farms, most of which are small- or medium-sized. The cultured species are mainly trout (42.16 %) and pacú (37.91 %).

The national government has put into action a National Plan of Animal Health, initially aimed at salmonid fishes, having declared the high basin of the Limay River up to Alicura dam, where most trout producers are located, free of diseases of obligatory declaration to the World Organization for Animal Health (OIE) by the National Agrifood Health and Quality Service (SENASA). It is also working on a classification of zones for bivalve mollusc culture, together with SENASA and the provinces involved in this type of production.

The national government has ordered the evaluation of aquaculture potential in seven provinces and the same is envisaged for the remaining provinces. In addition, a FAO/Ministry of Agriculture, Livestock and Fishing project to develop alternative diets with fish silage inclusion for small producers was completed. The Ministry of Agriculture also works to develop technologies for existing native and exotic species and promotes the theoretical-practice qualification.

At present, two aquaculture clusters are in place: the Aquaculture NEA Cluster in the northeast, with a “Competitive Improvement Plan” (includes the provinces of Misiones, Formosa, Corrientes and Chaco) and the Arco Iris Aquaculture Cluster in Neuquén province.

Fisheries and the environment

In accordance with the Federal Fisheries Council statement, the Undersecretariat of Fisheries and Aquaculture established a total and permanent area closure for fishing in national jurisdiction waters, within the Banco Burdwood, in the area located in the coordinates 54° 30 S and 60° 30 W, 54° 30 S and 59° 30 W, 54° 15 S and 60° 30 W, 54° 15 S and 59° 30 W.

In 2008, the CFP adopted the National Plan for Reducing the Interaction of Seabirds with Fisheries in the Republic of Argentina (www.minagri.gob.ar). Argentina is a full member of the Agreement on the Conservation of Albatrosses and Petrels (ACAP). The “National Plan of Action for Reducing the Interaction of Sea Mammals with Fisheries in the Republic of Argentina” is currently being prepared.

There is an MSC certification for the scallop fisheries, Argentine anchovy and longtail hake fisheries (approved in May 2012).

Fisheries Management and Conservation of the Biodiversity of the Fluvial Wetlands in the rivers Paraná and Paraguay, Argentina will be carried out with budgetary support from the United Nations Development Program (UNDP-GEF; Project FMAM).

The Undersecretary of Fisheries and Aquaculture is a member of the Consortium of the System of Coastal-Marine Protected Areas (ISCMPA) developed for the conservation and sustainable use of Argentina’s coastal marine biodiversity, financed by the a PNUD-GEF (www.thegef.org/gef/project_detail?projID=3910). There are 43 Coastal Marine Protected Areas along the coasts of the five maritime provinces.

Post-harvesting policies and practices

The National Agrifood Health and Quality Service (SENASA) is the governing sanitary organism whose main objective is the control and certification of products and sub-products of animal origin, as well as their inputs. It carries out tasks of prevention, eradication and testing of animal diseases, including those that can be transmitted to humans. It registers, authorises and controls vessels, processing plants, transport and trade of aquaculture and fishing products. In addition, it verifies transport, imports and exports of products, sub-products and derived products of fishing or farming origin.

The application of HACCP programmes, hazard analysis and critical control points is required only for processing plants that export to destinations where this is mandatory.

The National Institute of Food, the National Institute of Medicines, Food and Technology (ANMAT) carries out surveillance of food and develops recommendations. Other tasks are the early identification of non-compliance with the Argentinean Food Code (based on the Codex Alimentarius), discards of contaminated products, the modification of bad processing and handling practices in the industry, and the prevention and control of food borne diseases and the control of product label information.

The Codex Alimentarius regulations are enforced.

The Undersecretariat of Fisheries and Aquaculture and the National Institute of Statistics and Censuses (INDEC) are preparing a fisheries census (processing plants, vessels and fishermen) which will update data at the national and provincial levels.

Markets and trade

In 2011, exports of fishing products reached 471 000 t and USD 1 490 million, representing a growth of 3% and 12.72% respectively compared with 2010. The value in 2011 was the highest of the last decade. Exports are relatively stable in terms of volume, but the tendency is clearly growing in terms of value. Main destinations of exports of fishing products are Spain, Brazil, China, Italy and the United States.

Exports of shrimps, hake and squid products are the most significant. Exports of hake are stable in volume, while prices are increasing.

The availability of squid remains low. Giving the world importance of the Argentine squid fishery, prices have increased. Higher prices do not compensate, however, for the low catches and it has been impossible to regain profitability in this sector.

The situation of the shrimp fishery is the opposite. In 2011, landings were the highest of the last decade, while prices continued to fall. In addition to the market situation (Spain is the main market), companies faced competition from products derived from aquaculture that affected prices even more than increased catch volumes. As a consequence of lower incomes, there are more difficulties due to high costs (fishing and industry subsectors).

In 2010, imports reached 41 000 tonnes for a value of USD 125 million; in 2011, the values were 46 000 tonnes and USD 160 million. Compared to 2009, the increase was 44% and 63% respectively in volume and value. Main sources of imports of fishing products are from Chile, Ecuador, Thailand, Brazil and Spain.

In 2011, prepared or preserved fish were the main imported products, accounting for 63% of the total volume; fresh or chilled fish, excluding fillets, for 16%, and prepared or preserved seafood for 6%.

Imported food products of animal origin (fish included) must fulfil the provisions contained in two documents: the Decree 4238/68 (Regulation on inspection of products, by-products and animal derivatives) and Law 18284/69 (Argentine Food Code).

For authorisations to export to Argentina, the applicable standard is SENASA Resolution 816/2002 “Standard on auditing procedure to countries exporting goods to Argentina of animal, plant and products.” These include explicit requirements regarding visits to third countries, evaluations at plant level, and inspection systems.

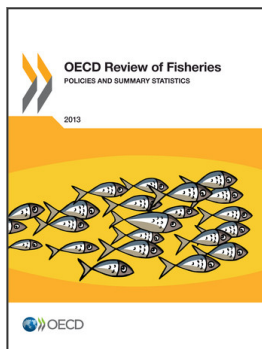
HACCP programmes, hazard analysis and critical control points are not required for audits of exported products with the exception of those products destined for countries where this is mandatory.

Argentina is a member of MERCOSUR. There are no import tariffs for members. For imports from non-MERCOSUR countries, the tariffs applicable to main products are: 10% (Chapter 3), 16% (Chapter 16), 6% (position 23.01), 10% (position 15.04, except cod fats and oils, 4%). There are preferential tariffs arrangements under ALADI.

Overview

The main objectives of the fisheries administration are as follows.

- To improve resources and marine ecosystems research, particularly those associated with the seabed of the extensive continental shelf beyond 200 miles.
- To continue to modernise the overall national fisheries information system in order to implement a system of inspection, surveillance and monitoring of fishing activities along the entire chain.
- To implement a system of fisheries through international accreditation organisations. The final goal is the certification of good practices for all Argentinean fisheries.
- To continue to comply with the Code of Conduct for Responsible Fishing (FAO).
- To increase efforts aimed at opening new markets, taking into account the difficulties experienced by traditional markets.



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