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MEDITERRANEAN ADVISORY COUNCIL

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"Socio-economic situation especially regarding small-scale fisheries."

In the extremely complex framework of Mediterranean fisheries management and of the related national and multilateral policies, for several years the small-scale fisheries sector has increasingly been receiving attention due to two main factors: high social and cultural value of the sector, lower environmental impact compared to other fishing sectors due to the greater selectivity of the fishing gear and the lower levels of fishing effort.

These and other characteristics of small-scale fishing in the Mediterranean have recently been recalled and analysed through several *cases studies* at the Regional Conference held in Algiers from 7th to 9th March by FAO GFCM on "Building a future for sustainable small-scale fisheries in the Mediterranean and the Black Sea".

The absolute predominance of small-scale fishing in the Mediterranean, (in every Country except for France and Spain) at least in terms of number of vessels (see Annex I, Graph 1) and persons employed (See Annex I, Graph.2), socio-economic relevance, productive importance, the wide variety of capture gears, target species, its seasonal nature, its expression of local knowledge and traditions, value in terms employment (also important for women), its close connection with the existence of coastal communities: these aspects and more were highlighted by the Second Conference held on the subject (after Malta 2013) and following endorsement by the FAO Committee on Fisheries (COFI) in June 2014 of the "Voluntary Guidelines for Securing Small-Scale Fisheries in the Context of Food Security and Poverty Eradication", complementary to the Code of Conduct for Responsible Fisheries of 1995.

In Algiers the importance of investing in small-scale fisheries was highlighted once more, specific data collection establishing, developing dialogue and supporting regional organizations and fora dedicated to the sector's fishers, encouraging the development of proactive relations with the other actors in the coastal area and the participation of sector operators in bottom-up decision-making processes. This would also make up for the fact that the sector has been penalized to a certain extent, it has not received consideration in terms of policy, it is a marginalized sector not normally included in the management plans (top-down) adopted to date.

This analysis may be overly generalized, perhaps uncharitable, at least on the European side of the basin where the attention to the sector by the co-decision makers is clear in the reformed CFP and in the European Maritime and Fisheries Fund. The CFP recognized that prefential access should be granted to small scale, artisanal or coastal fishermen, including incentives (Art. 7.D) to promote fishing methods allowing for a more selective fishing and with low impact on the marine ecosystem and its resources. Therefore, efforts should be spent in this direction as to insure that incentives and preferential access to coastal fishing grounds are ensured to low impact small-scale fishing fleets in

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opposition to unselective and impacting fishing segments. Nevertheless, in some member States, small-scale fisheries aren't well represented and more representation might be needed. However, aside from the exemplification and generalisations, which are inevitable given the extreme variety within the Mediterranean fisheries sector, the signal is still strong and clear: the small-scale fisheries sector is a priority area for investment in the overall pursuit of sustainability.

It is not a new signal, however it is struggling to be translated into concrete measures, partly due to the objective complexity of the issue. Any approach to intervention is faced with a sector whose boundaries are not clearly defined, quite the contrary, and which includes a wide variety of *métiers;* the conditions and characteristics for the sector differ greatly from one area to another, even within the same ports. The European definition of small-scale fisheries does not help, it has remained a technocratic and approximate description (12 m LOA with the exception of towed gears) after the reform failed in its attempt to consider other characteristics for a more appropriate definition (gear selectivity, impact on habitat, impact on key species, amount of catches, engine power, duration of fishing trips at sea, the presence of the vessel owner on board, the composition and organisation of the company, the presence of contracts that divide the earnings, marketing and sales of the fisheries product, range from the port and from the coast, vessel and gear characteristics).

For each of these different characteristics there are different socio-economic conditions:

- Vessel type: value/investment, ownership, organisation (cooperative; individual enterprise; family business) type of contract and division of income;
- Type of fishing activity (gear): seasonality, operating expenses, number of fishers on board, time spent at sea per fishing trip, distance from the port;
- Target species: quantities landed/value, market price;
- Fishing yields: costs/benefits, including direct costs (as fuel consumption) as indirect costs (as impacts on marine ecosystems);
- Local employment and development.

It is sufficient to consider these simple descriptors to understand the difference between the situation of a small 6 m vessel in which the owner goes to sea to set trammel nets from that of a 12m vessel employing longlines or small purse seiners with 4-5 crew members. They are worlds apart, they have different costs and land different fisheries products according to the season, with different prices paid in the port, in the fish market or when sold to restaurants. They work at different distances from the coast and the vessels are family-run or managed cooperatively.

In other words, the result of the fishing activity varies according to the vessel, the type of fishery, the season, the fishing area and the company structure. In real terms there is no such thing as "small-scale fishery", there are many individual small-scale fisheries, each with its own specific social and economic characteristics.
Notwithstanding this extreme variability within the sector, some common features and common situations can be identified:

- A low level of capitalization;
- Extreme difficulty in borrowing;
- Lack of capacity for investment and innovation;
- Obsolete vessels (on average over 30 years old);
- Low bargaining power on the market (except for direct sales in the port or at restaurants);
- Difficulties in enhancing the value of the product on board or once landed due to lack of adequate port infrastructure;
- Frequent conflicts between the different areas of fishing activities (especially with trawl fisheries);
- Competition with recreational fisheries;
- Lack of compliance with on board safety regulations;
- Lack of generational change.

Profitability of the enterprises varies greatly depending on the characteristics mentioned above, generally speaking they are micro-enterprises and the costs linked to bureaucracy significantly affect their activities. Furthermore, the fact that the vessels are smaller than commercial fishing vessels means that it is not possible to go to sea in adverse weather conditions, which means that the annual number of days at sea is much lower than other sectors.

Within this framework, small-scale fisheries are not a happy alternative, they are subject to the same dynamics as industries, with a general decline in employment (Greek and Croatian data are available only from 2012 and Spain shows a strange increase in 2011. However, the trend shows a decrease of around 10% between 2012 and 2013, see Annex I, Table 1) and the reduction of the fleets (taking out the data on Croatian fleet, which started to be collected in 2012, there is a less evident decrease in the number of SSF vessels overtime, even though it is much stronger between 2011 and 2012, see Annex 1 Table 2) despite the fact that the increased flexibility of micro-enterprises should make them more able to withstand critical periods like the current one. Neither can the lower impact of fuel costs be generalised across the sector, as this varies greatly according to the range of the vessels (the difference for example between gillnets and longlines).

There are positive cases that can be observed in the field of marine protected areas, in areas with a strong vocation for tourism and where forms of diversification and enhancement of the product's value (through pesca tourism at sea and *ittiturismo* related tourism on land) can be effective even though captures are reduced. Many direct sales initiatives and small restaurants that are managed directly by the fishing enterprises are proving extremely successful and in many cases involve the whole families of the fishers.

With the exception of these success stories, the great potential and many strengths of the sector still collide with the harsh reality, in which the fragility of the business enterprises themselves places serious limits on the prospects for recovery, given the absence of specific support policies for each single area of the sector, which with an innovative approach could emerge from the new generation multi-annual plans envisaged in the recent reform.

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There are various critical issues that the sector is currently experiencing, however particular emphasis should be given to the following:

SAFETY ON BOARD VESSELS

The EMFF does not foresee measures for initiatives related to safety on board as these issues have already become obligatory by the laws now in force. It would be useful to envisage rapid tracing systems and a direct, automatic link to emergency services, especially for those vessels with just one fisher on board.

FISHING PORTS AND DOCKS

There are constant difficulties for small-scale vessels where moorings are concerned, either due to the port structure (docks not at the right level, moorings in parallel rows, etc.), and also with regard to the availability of fully serviced docking areas.

RECREATIONAL FISHERIES

The lack of recreational and sport fishing specific permissions can, in some areas, penalize the professional activities of the small-scale fisheries sector, as well as the use of typical gears of the professional sector (longlines and pots), still allowed (in some Member States) to recreational and sport fishing. Recreational fisheries and small scale fisheries often target the same fish species. The lack of catch data on some species makes it difficult to evaluate the catch ratio of professional and recreational fisheries and the impact on fishing resources.

THE IMPACT OF LEGISLATIVE MEASURES

Several recent legislative measures have impacted negatively on small-scale fisheries: the reduction to 50 euro/consumer (Control Reg.) of the amount that it is possible to sell in the port on landing (limiting direct sales cause reduction in income); the introduction of expensive new signal devices for the fishing gear (buoys with lights, etc. are additional costs); vessels over 10 meters, whatever the gear, are now obliged to compile the fishing logbook as well as the landing declaration even if it is just the paper version, to be completed before even landing even when there is no catch at all (time to compile this logbook is an additional operational costs). The requirement to prepare the catch, separating the species and dividing them into different cases, which is made more difficult by the lack of space on board as well as the extra work to be done by fishers, both at sea and on land (are other additional operational costs).

RELOCATION OF FISHERY OPERATORS, PESCA TOURISM

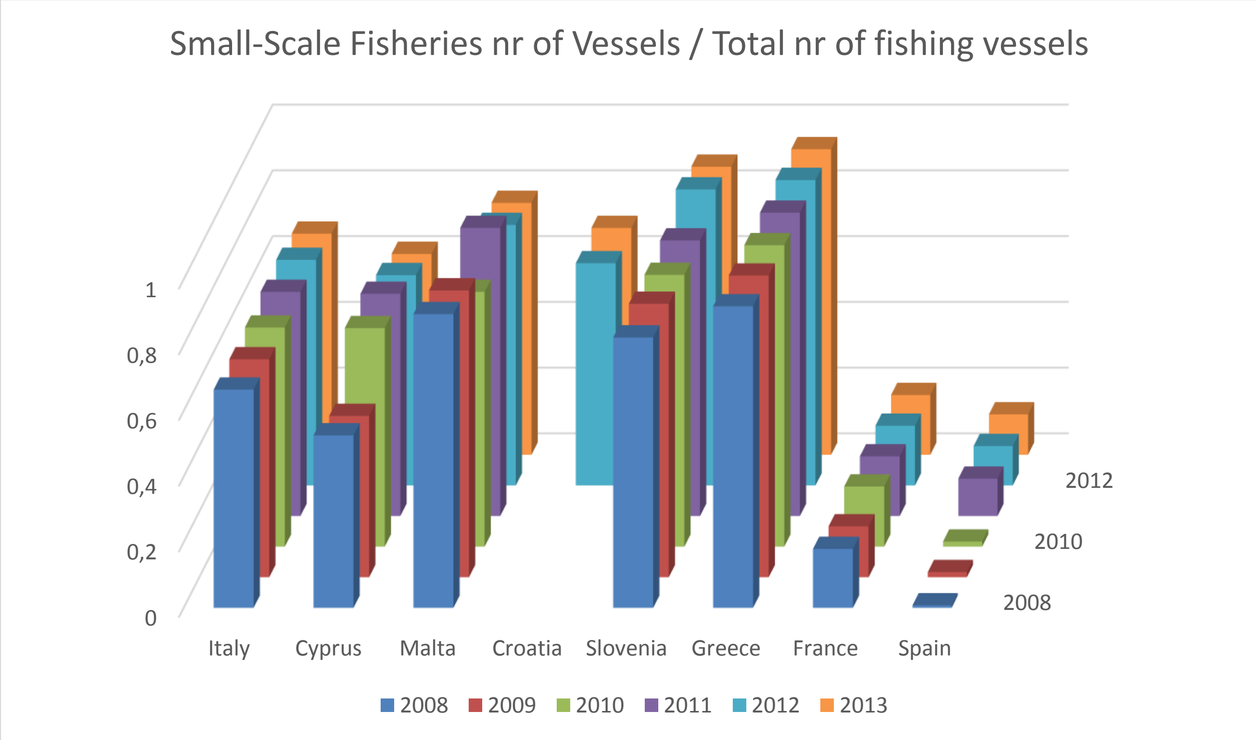
The development of pesca tourism should be favoured by the provisions of art. 30 of the EMFF (diversification and new forms of income) that envisages economic support for 50% of the initiative foreseen in the business plan, up to a maximum of 75 000 euro. In general, for activities that could be amplified in coastal areas and could relocate workers no longer employed in the fisheries sector (environmental services, marine park wardens, services to yachting, mariculture site wardens etc.), the EU has not shown particular interest, only reserving support for young people (who are unemployed) under 30 years old. (Art. 29, paragraph 1a support for human resources).

ENVIRONMENTAL PROBLEMS IN COASTAL AREAS

Small-scale fisheries are the first ones affected by deteriorating conditions in coastal areas due to industrial activities both on land and at sea (e.g. drilling/mining, leaks and spillages, high-impact fishing gears, uncontrolled anchoring on sensitive bottoms (posidonia etc.), as well as by changes in coastal sediments. These conditions have a major impact on the conservation of essential fish ecosystem and on the presence of certain target species (clams, carpet shells, cuttlefish, etc.), affecting their growth and reproduction (sardines and anchovies), and often also causing mortality or deformation among specimens. The EMFF includes intervention in the context of "environmental" problems with the activation of a fund (with a loss-sharing mechanism) addressing affected aquaculture producers (art. 57) and fishers (art. 35). The fund aims to make it possible to take out insurance to cover adverse events. Small-scale fishers are unlikely to be able to take out insurance given that the loss-sharing mechanism means that the fund's participation cannot exceed 50% of the insurance cost.

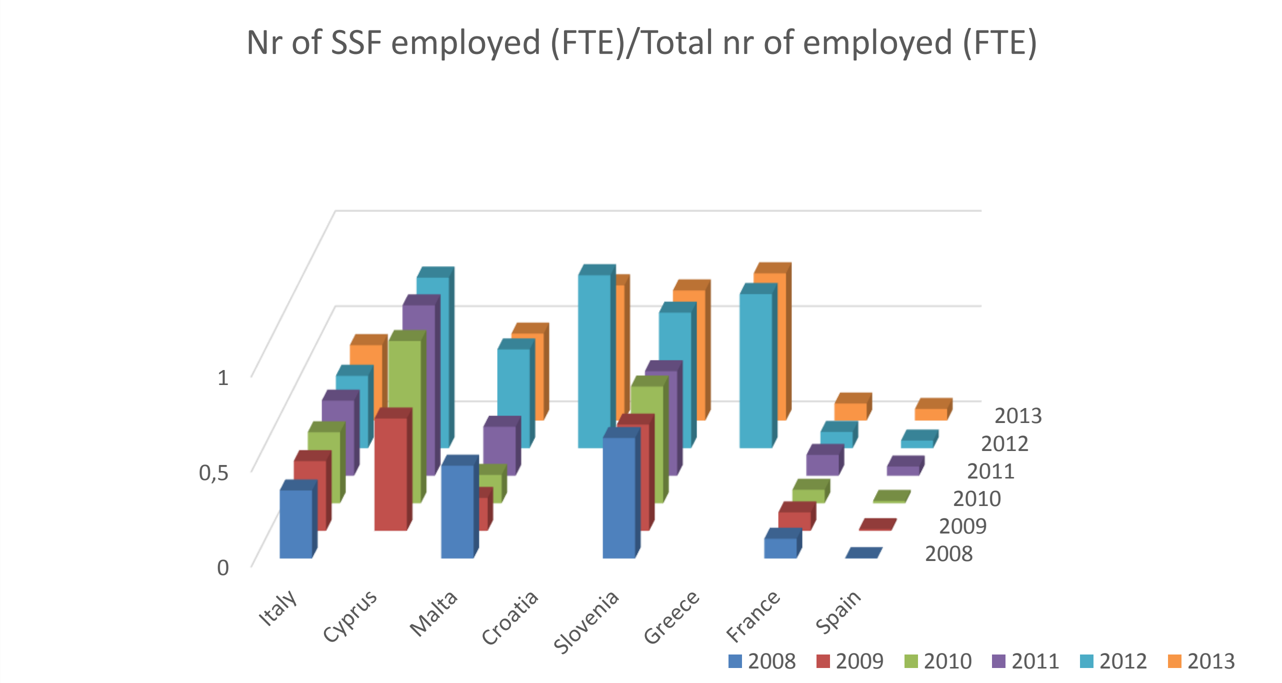
Annex I: Graphs and Tables

Graph. 1: Small-Scale fishing vessels over total number of registered fishing vessels in MS (2008-2013)



Source: "STECF 15-07_2015_EU Fleet Economic and Transversal data_fleet segment level", available at https://stecf.jrc.ec.europa.eu/data-reports.

Graph. 2: Nr of SSF employed (FTE) over total number of employed (FTE)



Source: "STECF 15-07_2015_EU Fleet Economic and Transversal data_fleet segment level", available at https://stecf.jrc.ec.europa.eu/data-reports.

Table 1: Nr of employed in the SSF sector, 2008-2013

	2.008	2.009	2.010	2.011	2012	2013
Italy	7.810,4	8.175,5	8.172,7	8.172,0	7.885,0	7.872,0
Cyprus	1.300,0	642,5	777,9	732,6	732,2	0,0
Malta	46,4	27,9	39,0	41,5	191,1	73,0
Croatia					2.300,5	1.773,9
Slovenia	48,8	46,1	49,9	42,4	44,7	51,3
Greece	n.a	n.a			19.395,7	17.440,0
France	815,0	880,7	598,0	849,6	612,7	642,2
Spain	40,8	325,4	432,8	1.616,9	1.213,4	1.763,3
TOT	10.061,4	10.098,1	10.070,2	11.455,0	32.375,2	29.615,7

Source: "STECF 15-07_2015_EU Fleet Economic and Transversal data_fleet segment level", available at https://stecf.jrc.ec.europa.eu/data-reports.

Table 2: Nr of SSF fishing vessels, 2008-2013

	2.008	2.009	2.010	2.011	2012	2013
Italy	8.887	8.834	8.800	8.810	8671,54	8537,52
Cyprus	743	877	876	942	886	894
Malta	1.177	970	862	953	840	797
Croatia					2847	3007
Slovenia	149	154	153	156	154	149
Greece	15.834	15.761	15.635	15.268	14927	14830
France	1.308	1.130	1.321	1.299	1298	1296
Spain	97	180	172	1.240	1265	1250
TOT	28.195	27.906	27.819	28.668	30.889	30.761

Source: "STECF 15-07_2015_EU Fleet Economic and Transversal data_fleet segment level", available at https://stecf.jrc.ec.europa.eu/data-reports.

Table 3: Total nr of registered vessels, 2008-2013

	2.008	2.009	2010	2.011	2.012	2013
Italy	13.470,3	13.374,0	13310,77	13.193,7	12.918,8	12634,75
Cyprus	1.414	1.785	1317	1.393	1.385	1463
Malta	1.316,0	1.111,0	1112	1.087,0	1.060,0	1040
Croatia					4.211	4358
Slovenia	181,0	185,0	185	186,0	181,0	171
Greece	17.248	17.168	17047	16.542	16.063	15954
France	7.919,0	7.290,0	7234	7.211,0	7.144,0	7125
Spain	13.115	11.501	11209	10.900	10.544	10167
TOT	54.663,3	52.414,0	51414,77	50.512,7	53.506,8	52912,75

Source: "STECF 15-07_2015_EU Fleet Economic and Transversal data_fleet segment level", available at https://stecf.jrc.ec.europa.eu/data-reports

Table 4: Total nr of employed persons (FTE), 2008-2013

	2.008	2.009	2010	2.011	2.012	2013
Italy	21.817,4	22.242,3	21838,35	20.664,6	20.716,1	19855
Cyprus	828	1.086	910,9	818	817	
Malta	95,0	161,0	261	161,0	368,0	159,81
Croatia					2.532	2495,54
Slovenia	76,9	82,4	81,12	77,0	62,7	75,07
Greece					23.944	22545,92
France	7.841,0	9.057,9	8403	7.750,0	7.180,0	7150
Spain	30.715	35.844	33678,32	33.210	30.302	28781,91
Tot	61.373,0	68.473,5	65172,69	62.680,3	85.921,2	81063,25

Source: "STECF 15-07_2015_EU Fleet Economic and Transversal data_fleet segment level", available at https://stecf.jrc.ec.europa.eu/data-reports