



**CPMR Intermediterranean Commission Task Force on Fisheries & Aquaculture**

**TERMS OF REFERENCE**

The Intermediterranean Commission General Assembly approved last 30<sup>th</sup> June in Venice the launch of an ad hoc Task Force aiming to promote the competitiveness and sustainability of the Mediterranean fisheries and aquaculture sector. The Task Force will be set-up in the frame of the Intermediterranean Commission Working Group on “Transport & Integrated Maritime Policy”.

This document provides a non-exhaustive list of issues that should be covered by the Intermediterranean Commission Task Force. It also provides some ideas about the initiatives that could be implemented over the next two years.

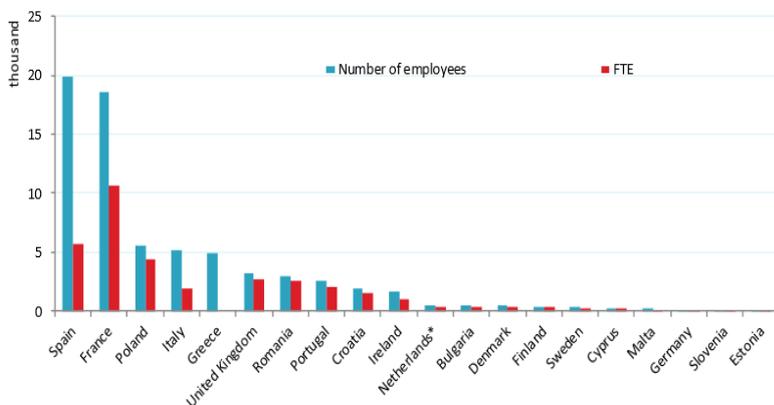
**GENERAL BACKGROUND**

Since 1970 the Common Fisheries Policy (CFP) and its financial instrument, the European Maritime and Fisheries Fund (EMFF), regulates the exploitation of the EU fish stocks as well as the aquaculture production in Europe. The CFP aims to ensure that fishing and aquaculture are environmentally, economically and socially sustainable and that they provide a source of healthy food for EU citizens.

Fisheries and aquaculture plays a strategic socio-economic role in Europe by ensuring employment, development and growth at territorial level. For instance:

According to last available data the EU fishing fleet<sup>1</sup>:

- registered in 2014 a net profit margin of 10,6 % (data do not cover Greece);
- directly employed 149,195 fishers in 2013, corresponding to 110,096 full-time employments (both figures exclude Cyprus). More specifically, five Member States fleets employed 77% of the total EU fishers, with the Spanish fleet employing 22%, followed by the Italian (18%), Greek (17%), Portuguese (12%), and UK (8%) fleets;
- generated €6.862 billion of revenue in 2013 (excluding



	GVA to revenue (%)	Gross profit margin (%)	Net profit margin (%)
BEL	42.8	8.7	3.4
BGR	49.0	0.9	28.1
CYP	10.7	1.5	22.1
DEU	52.8	17.6	4.8
DNK	61.8	34.0	9.6
ESP	52.4	22.0	16.5
EST	69.2	26.7	11.2
FIN	39.4	18.3	21.3
FRA	49.5	12.8	4.7
GBR	47.9	25.2	18.3
GRC	24.1	27.8	11.2
HRV	47.9	17.9	20.3
IRL	52.4	27.0	15.4
ITA	55.9	27.4	6.7
LTU	14.4	5.2	1.9
LVA	35.5	20.2	11.7
MLT	45.0	7.3	13.5
NLD	46.8	18.5	7.1
POL	45.2	12.7	1.8
PRT	64.5	27.3	10.9
ROU	60.4	18.1	5.4
SVN	82.5	49.0	35.7
SWE	48.1	19.1	0.7
<b>EU excl. GRC</b>	<b>51.5</b>	<b>21.9</b>	<b>10.6</b>
<b>% Δ to 2013</b>	<b>5.8%</b>	<b>13.6%</b>	<b>45.6%</b>

Greece due to no reported data; and excluding Bulgaria, Cyprus and Malta since data considered unreliable). This amount consisted of €6.736 billion in fish sales and €127 million in non-fishing income.

Aquaculture<sup>2</sup> covers over 20 % of the total EU fish production, producing around 1.2 million tonnes and EUR 4 billion in value.

It is estimated that the EU28 aquaculture sector directly employs around 80,000 workers.

The total value of sales (turnover) from the EU28 aquaculture sector is reported at 4.365 million Euros in 2012.

<sup>1</sup> The 2016 Annual Economic Report on the EU fishing Fleet, Scientific, Technical and Economic Committee (STECF).

<sup>2</sup> The Economic Performance of the EU Aquaculture Sector (STECF 14-18).

However, despite this positive general overview, today the EU fisheries and aquaculture sectors are at a crossroads facing challenging environmental issues as well as economic and social conditions.

In this contest, the Mediterranean fisheries and aquaculture sectors appeared to be particularly vulnerable to these challenges.

For instance, according to last available studies<sup>3</sup>, contrary to the evidence performed in other EU basins (e.g. North Sea and Baltic Sea), most commercial Mediterranean fish stocks seem to be overexploited.

Beyond the problem of overfishing, the Mediterranean fishing industry is affected by low levels of financial viability. Indeed, according to last available data<sup>4</sup>, 3 out of 8 MED fleets recorded positive net profit margin (Spain, Italy and Slovenia) while France, Cyprus, Croatia, Greece and Malta suffered net losses.

	Live weight of landings	as a % of total landed weight	Value of landings	as a % of total landed value	Revenue	Labour costs	Energy costs	Gross Value Added	GVA to revenue	Gross profit	Gross profit margin	Net profit	Net profit margin	Average GVA	GVA per FTE					
	(K tonnes)	(%)	(K €)	(%)	(K €)	(K €)	(K €)	(K €)	(%)	(K €)	(%)	(K €)	(%)	(K €)	(K €)					
Mediterranean Sea and Black Sea	BGR	7,897	100%	4,334	100%	5,488	2,736	1,508	2,687	49.0	-	48	-	0.9	-	1,543	-	28.1	2.4	5.0
	CYP	1,237	94%	6,819	91%	6,812	668	1,927	937	13.8	269	4.0	-	5,090	-	74.7	1.1	1.3		
	ESP	77,063	8%	249,400	12%	334,044	149,799	66,119	189,481	56.7	37,025	11.2	13,203	4.0	77.1	26.6				
	FRA	13,837	3%	56,142	5%	73,249	31,215	16,226	32,600	44.5	1,386	1.9	-	7,371	-	10.2	26.9	33.5		
	HRV	79,408	100%	60,841	100%	76,479	22,785	19,194	36,596	47.9	13,811	18.1	-	10,934	-	14.3	13.5	17.0		
	ITA	176,778	100%	813,320	100%	824,161	234,964	221,711	460,958	55.9	225,994	27.4	57,391	7.0	39.9	22.3				
	MLT	2,401	100%	10,453	100%	11,670	6,103	2,702	5,251	45.0	-	852	-	7.3	-	4,651	-	39.9	7.4	4.7
	ROU	2,200	100%	2,458	100%	2,458	1,041	554	1,485	60.4	445	18.1	135	5.5	12.1	39.2				
	SVN	254	100%	1,277	100%	2,741	918	232	2,261	82.5	1,343	49.0	1,012	36.9	24.8	28.2				
GRC	47,642	100%	278,651	100%	282,544	280,542	182,181	-126,698	-	44.8	-407,240	-	144.1	-477,999	-	169.2	-	9.3	-	3.1

With regards to Mediterranean aquaculture, although its socio-economic reality is different from that one of fishing, this sector needs for structural interventions in order to enhance its competitiveness in the EU fishing market.

In this respect efforts should be focused on technical performance together with a shift from production-oriented growth to market-oriented and consumer responsive approach.

In addition, a special issue concerning the Mediterranean EU countries is the lack of available credit due to financial crisis. This seems to be an important issue shared by these countries and is considered an important hindrance to the future development of the aquaculture sector.

## CPMR INTERMEDITERRANEAN COMMISSION POLITICAL AND TECHNICAL PRIORITIES

The task-force on fisheries and aquaculture will aim to cope with challenges mentioned above and to foster sustainable development of the fisheries and aquaculture sector in the Mediterranean region. It will work in close collaboration with the CPMR general secretariat and the other thematic working group of the other CPMR geographical commissions under the political framework of the CPMR's maritime agenda.

In this context, the CPMR Intermediterranean Commission Task Force will promote sound synergies among the Intermediterranean Commission members in order to:

- **MONITOR THE IMPLEMENTATION OF THE CFP**

In this respect, the Intermediterranean Commission Task Force will precisely focus on issues as follows:

- Enhancing selectivity of fishing practices and gears;
- Landing obligation of all catches and management of discards;
- Exploitation of Mediterranean fish stocks above the Maximum Sustainable Yield (MSY) levels;
- Design and implementation of National and Local multiannual management plans;

<sup>3</sup> Scientific Technical and Economic Committee for Fisheries (STECF) – Mediterranean Assessment part 1 & 2, Report EUR 27758 EN.

<sup>4</sup> The 2016 Annual Economic Report on the EU fishing Fleet, Scientific, Technical and Economic Committee (STECF)

- Introduction of quota and/or other management tools for MED commercial fisheries stocks;
- Diversification of fishing activities within the fishing sectors (e.g. pescaturism, ittiturismo, etc.);
- International dimension of the CFP : Joint agenda with non EU Countries (the whole Mediterranean area with a focus on Balkans, Tunisia and Morocco);
- Enhancing the development of “bio” aquaculture;
- Improving innovation and technological development in the aquaculture sector;
- Co-management and economic benefits of MED Maritime Protected Areas (MPAs);
- Need for a multi-level governance and role played by the Mediterranean Regional governments in the CFP’s regionalisation.

- **BOOST FINANCIAL SUPPORT TO THE FISHERIES AND AQUACULTURE SECTOR**

In this respect, the Intermediterranean Commission Task Force will precisely focus on:

- State of play of public and private investments in favour of Mediterranean fisheries and aquaculture sector. In this respect, special attention will be paid to the state of play of the EMFF’s implementation (identification of best practices, etc.);
- Synergies with European Structural Funds (e.g. links with Smart Specialisation Strategies and ERDF/ESF funds);
- Role played by financial instruments.

- **PROMOTE FISHERIES AND AQUACULTURE IN MEDITERRANEAN EMERGING STRATEGIES & INITIATIVES (EUSAIR AND WESTERN MED ON TOP).**

In this respect, the Intermediterranean Commission Task Force will precisely focus on:

- Transnational and cross border cooperation;
- Design of macro regional or flagship/pilot projects ideas;
- Identification of best practises.

- **DESIGN & IMPLEMENTATION OF TRANSNATIONAL AND CROSSBORDER PROJECTS.**

In this respect, the Intermediterranean Commission Task Force will promote technical exchange among the Intermediterranean Commission Regions in order to capitalise on their expertise and build on common initiatives/approach that could allow Mediterranean stakeholder to address challenges affecting the MED fishing and aquaculture sector. Specifically, the task force will promote the setting-up and implementation of project proposals under the main European and Mediterranean programmes:

- INTERREG V B (e.g. MED and ADRION) and ENI CBC programmes as a priority;
- INTERREG V A and C;
- IPA programmes;
- ERASMUS +;
- HORIZON 2020.

- **FOSTER EDUCATION AND TRAINING IN THE FISHERIES AND AQUACULTURE SECTOR**

In this respect, and in connection with the CPMR’s Vasco da Gama initiative, the task-force will promote the development of analysis and studies on the state of play of education and training in the fisheries and aquaculture sectors. The obtained results will be used in order to update the existing education and training services and/or to promote the design and implementation of new and innovative one.