



*SCIENTIFIC COOPERATION TO SUPPORT
RESPONSIBLE FISHERIES IN THE ADRIATIC SEA*

MiPAF

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Agriculture
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The Albanian marine capture fisheries:
their social and economic aspects

Edited by

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Preface

The Regional Project “Scientific Cooperation to Support Responsible Fisheries in the Adriatic Sea” (AdriaMed) is executed by the Food and Agriculture Organization of the United Nations (FAO) and funded by the Italian Ministry of Agriculture and Forestry Policies (MiPAF).

AdriaMed was conceived to contribute to the promotion of cooperative fishery management among the participating countries (Republics of Albania, Croatia, Italy, Serbia-Montenegro and Slovenia), in line with the Code of Conduct for Responsible Fisheries adopted by the UN-FAO.

Particular attention is given to encouraging and sustaining a smooth process of international collaboration among the Adriatic Sea coastal countries in fishery management, planning and implementation. Consideration is also given to strengthening technical coordination between the national fishery research institutes and administrations, the fishery organizations and the other relevant stakeholders of the Adriatic countries.

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Preparation of this document

This document is the final version of the report of the FAO-AdriaMed research programme “AdriaMed Social Survey of Albanian Marine Fisheries” implemented to gain a detailed insight into the social context of the Albanian fisheries.

The social survey was executed in cooperation with the Albanian Fisheries Directorate and AdriaMed in 2003 with the aim of contributing to the establishment of the basis for planning and management of national capture fisheries by ensuring that their social context is properly known and understood.

The social survey initiative can be regarded, as far as the Adriatic Sea region is concerned, as a contribution in the context of social indicators for Mediterranean fisheries. However, it should be kept in mind that this AdriaMed Technical Document was taken principally from that survey and therefore changes that may have taken place since 2003 in the Albanian fisheries sector are not accounted for in this document.

The document aims to provide useful indications on the Albanian Marine Fisheries in 2003 in order to improve understanding of the fishery sector in the Adriatic Sea. The survey provided the fishery management authority with an analytical tool for the identification of the target groups and the livelihood of the fishers; the identification of the motivation of the resource users; the evaluation of the working conditions and fishing strategies; the understanding of the characteristics and the relations within and between the maritime districts; the business practices and strategies adhered to.

Moreover, this study allowed for an analysis of the intergenerational dynamics among fishers, the interrelation between the various roles within the crew structure and the perception of the sector’s strengths and weaknesses, both within each maritime district and among the districts.

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The Albanian marine capture fisheries: their social and economic aspects

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ABSTRACT

This document introduces the outcome of the AdriaMed Social Survey of Albanian Marine Fisheries that was carried out in 2003 in order to gain a detailed insight into the social context of the Albanian fisheries. The socio-economic aspects considered were assessed from three standpoints: (1) personal data, (2) maritime district characteristics and relations, and (3) crew working conditions and fishing strategies. One hundred and eighty-three fishers were interviewed (561 questionnaires) from 67 fishing vessels (30% coverage). The survey provided the Albanian fishery management authority with an analytical tool for the identification of the target groups and the livelihood of the fishers; the identification of the motivation of the resource users; the evaluation of the working conditions and fishing strategies; the understanding of the characteristics and the relations within and between the maritime districts; the business practices and strategy. Moreover, the study allowed for an analysis of the intergenerational dynamics between fishers, the interrelation of the various roles within the crew structure and the perception of strengths and weaknesses in the sector, within each maritime district and among the districts. The objectives, the methodological approach and the structure of the survey are presented. Some considerations of the methods used and results obtained are also given.

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1. Introduction

Fisheries management is not essentially about the management of fish. Fishery is an industry and fishing is a human activity, and it is through regulation of fishing that the viability of fish stocks is pursued (Jentoft, 1998). As obvious as it may seem, it is sometime overlooked that “fisheries are places where human activities are linked with marine ecosystems and renewable resources” (McGoodwin, 2001), and capture-fishery management is put into practice through people (Jentoft and McCay, 1995).

Fishery management should take into consideration, among other things, the social dimension of fishing communities; management success also depends on efficient communication among the different stakeholders, a knowledge of the fishing community and of how people operate in the fishery system is now considered a key aspect of fishery management (Kaplan and McCay, 2004; Salas and Gaertner, 2004). The comprehension of all the social aspects of fisheries is important, since it provides a more comprehensive understanding of the fishery system. The relevance of social issues is indicated in all 12 articles of the Code of Conduct for Responsible Fisheries (FAO, 1995). In a Sustainable Development Reference System (FAO, 1999) the social component is indicated as one of the main dimensions to be taken into consideration in the framework of the fishery system. The social component of fishery management consists not only of markets, efficiency and access to exploitable resources; it is also the social science of households, gender, communities, power, equity, democracy and knowledge (Jentoft, 1998).

Some of past failures in fishery development and management are believed to have been also due to the poor understanding and knowledge of the wide range of social and cultural aspects of the people involved in the fishery sector and of their effect on fishery interventions (Hilborn, 1985; Townsley, 1998). Among the causes of ineffective policy decisions in the past was, as is now recognized, the single-discipline approach that oversimplified complex and dynamic fishery systems (Preikshot, 1998). The importance of the fullest possible participation and involvement of the stakeholders in the fishery management process is recurrently evoked (Berkes, *et al.*, 2001), and the Adriatic Sea region is no exception (AdriaMed, 2002). Such involvement is expected to contribute significantly to the effectiveness of resource management. The basic step in participation is the identification of the stakeholders or actors. Managers need to know the fishery and also need to have a sound knowledge and understanding of the whole resource-user (stakeholder) system for the purpose of cooperation in conservation, consensus building, conflict resolution and not least fishery planning (Berkes, *et al.*, 2001).

It is highlighted in the mandate of the GFCM Scientific Advisory Committee (GFCM- SAC 1997) that the Committee must provide scientific, social and economic information, data or advice relating to the work of the Commission. The recommendation of the SAC to increase studies on the social component of fisheries, as well as the identification of some indicators for studies on Operational Units, has been adopted by the GFCM. In particular, at the opening of the First Session of the SAC it was underlined that “For any fisheries management to be sustainable it should take into consideration the social dimension of the fishing community. A purely scientific approach to fisheries management did not have any chance of success unless

it was accepted by all stakeholders. A balance between the scientific requirements for the conservation of the stocks and the socio-economic conditions prevailing in the areas concerned was the best guarantee for sustainable management of the fishery sector,” (GFCM, 1999; p. 1).

The FAO Regional Project AdriaMed “Scientific Cooperation to Support Responsible Fisheries in the Adriatic Sea”, in order to gain a detailed insight into the social context of the Albanian fisheries, implemented the research programme “AdriaMed Social Survey of Albanian Marine Fisheries”. This initiative was introduced during the fourth session of the Working Group on Socio-Economic Indicators of the SAC Sub-Committee on Economic and Social Sciences (SCESS), Barcelona, Spain, 15-17 March 2004 and during the fifth meeting of the SCESS, Málaga, Spain, 10-12 May 2004; it was considered a positive contribution in the context of social indicators for Mediterranean fisheries.

Sustainable fisheries and responsible fishery management are important issues in the Mediterranean. In Albania, since the late 1980s, fisheries has been a growing sector contributing to employment, nutrition, trade, foreign exchange earnings, etc. Albanian marine capture fisheries have drastically changed since the end of the 1980s (see next chapter), rapidly switching from a mainly small pelagic fishery to an almost entirely demersal trawl fishery, meanwhile undergoing the difficulties and hardship associated with the national transition from a centralized to a free-market economy. The Albanian society experienced major changes which also affected the social component of the fishery sector. However, such changes could be supposed but not assessed, owing to the lack of specific investigations resulting from a shortage of both financial resources and expertise. This gap in the knowledge of the fishing sector was identified as one of the priorities for fishery planning and management in Albania (AdriaMed, 2001). This constituted the rationale for a formal and complete survey such as this one.

The social survey was executed cooperatively by the Albanian Fisheries Directorate and AdriaMed in 2003 with the aim of contributing to the establishment of the basis for planning and management of national capture fisheries, by ensuring that their social context is properly known and understood.

2. Past and present situation of the Albanian marine capture fishery sector

Albania has considerable potential where aquatic resources are concerned and these offer great opportunities for the development of fishing. Albania is a coastal State on the Adriatic Sea as well as being endowed with inland waters: lakes, rivers and many lagoons. The Albanian coastline is 470 km long and its territorial waters extend up to 12 nautical miles, or 22 km, from the coast. The continental shelf in the north is more than 25 miles wide, but only 2-3 miles in the south. In the international waters, over 25 miles from the Albanian coast, the Adriatic Sea reaches a depth of over 1,000m. The seabed varies from north to south: in the north the shelf extends out to the 200m isobath and the seabed is smooth (mud and sand), whereas in the south the 200m isobath is very close to the shore and the seabed is stony (covered with pebbles and rocks).

Table 1. General data on the fishery sector in Albania and other Adriatic countries – 2001

	Albania	<i>Croatia</i>	<i>Italy</i>	<i>Serbia-Montenegro</i>	<i>Slovenia</i>
per caput fish supply (kg/year, 1997-99)	2.00	4.03	21.09	2.07	6.07
production (mt live weight)	2,324	24,523	512,097	9,190	3,218
non-food uses (mt live weight)	0	412	30,364	82	13
imports (mt live weight)	7,079	19,704	945,615	20,036	13,504
exports (mt live weight)	3,147	25,382	170,061	528	3,276
food supply (mt live weight)	6,261	19,832	1,257,287	28,616	13,433
imports (US\$ ×1,000)	5.240	64.708	2.722.414	35.275	28.227
exports (US\$ ×1,000)	6.890	63.895	381.928	272	5.820
net balance (exports–imports)	1.650	-812	-2.340.485	-35.002	-22.406
fishery exports as a percentage of agricultural exports (%)	23.05	7.07	11.05	10.07	3.09
fishery exports as a percentage of total merchandise exports (%)	2.03	0.08	1.02	0.07	0.03

Source: FAO Yearbook of Fishery Statistics – 2001

Marine fishery vessels reached Albania in 1945-1946. During the 1950s the situation in the fishery sector was very difficult as the nets were made of cotton and had low resistance, making tiring work for the fishers. The substitution of cotton nets by “perloni” nets started gradually in 1956 and 1957. The bulk production of “kaproni” nets was commenced in 1958-1959. This brought a noticeable technical improvement in sardine fishing and gave greater guarantees for fishing in heavy weather conditions.

The completion of the marine fishing fleet in Albania has been approximately as follows: in 1951-1952, three seiner type wooden boats of 140hp were activated; in 1951-1953, the construction of wooden boats of 80hp was started in Durres for sardine fishing; in 1956 ten trawler type metallic vessels of 80hp were acquired for trawling from the starboard side and for fishing with driftnets from the port side, where the wooden roller and other gear were located. To support this group of ten vessels, the qualification of master fishers, torchers, engine technicians and skippers, through courses and in schools in Albania and abroad was completed. In 1958 the first sardine-fishing vessels came from Romania and in the same year five new vessels of the seiner type of 140hp came from the former USSR and were used for two kinds of fishing: trawling and sardine seining. In 1959, ten metallic vessels of 80hp came from East Germany for sardine fishing. By the end of the year, two modern vessels arrived from Rostock, East Germany, of 300hp, which for decades remained the best vessels of the Albanian fishing fleet. Together with five or six wooden boats from the navy and six fishing vessels constructed in Italy, with 200hp engines of the Ansaldo type, the fishing fleet in the country at the beginning of the 1960s consisted of 30 vessels.

In 1967, the shipyard in Durres constructed the first metallic fishing boat of 80hp. In 1971, according to the plans, the construction of metallic fishing vessels of 408hp and, later on 575hp, started officially, mainly for the purpose of trawling; the number of vessels increased to 35. The old vessels were repaired, new engines were installed and, following this the construction of vessels of 300hp began in the shipyard. Such vessels will make up the future sardine fishing fleet of 20 vessels, replacing the existing obsolete vessels.

The sardine fishery developed significantly because it had much lower costs than those of demersal trawlers. This fleet was about 65 vessels, distributed as follows: 28 in Vlore, 12 in Durres, 17 in Shengjin and 8 in Sarande. The annual production of this fleet was 6,000 tons of sardines. For the industrialization of this production, new sardine-processing (conservation) plants were constructed. The processed sardine was destined for export, but also for the domestic market. The fishing of sardine with purse seiners out of Vlore had different phases of development; this had an effect on the improvement of the technology, the reduction of fishing time, improved conditions for the fishers, ability to fish in bad weather and, of course, on the increase in fish production.

At the beginning of 1972, significant technological improvements in trawl-fishing techniques were achieved. These consisted in the standardization of fishing gear and equipment so that they more closely resembled the Italian ones. At the same time, the construction of new trawlers began. It was ensured that the vertical net opening was bigger than the existing ones. Such improvements came as a result of the persistent work and of the necessity of fishing in depths over 200m, as the appropriate conditions were created by the construction of new vessels with engines of over 400hp.

At the start of the 1970s, the areas 160-180-200m north of Sazan Island were explored, where the mackerel resources during winter were very high. Based on experience, the extension of fishing grounds started in the north, from the region off Durres up to the Budva Cape, in depths of up to 350m. This necessitated an increase in fishing time, up to seven continuous days at sea; it also played a positive role in the protection and improvement of the fishery resources on the continental shelf, along with the qualification of fishers. The extension and enhancement of the fishing fleet continued, with 20 new vessels of over 400hp and, later, with other vessels of up to 575hp constructed in the shipyard in Durres. The years 1977-1979 were very productive and favourable for the marine fishery. In total, the most important species were: sardine, mackerel, gobies, etc. whereas the high-value species were still at a low level. A negative phenomenon of the period was that some important species, such as sepia, octopus, etc. still had a low level of consumption. During times of high production, such as that of sardine, after the completion by the processing factories and appropriate refrigerators in the market enterprises, the rest of the catch was utilized for flavouring. In spite of the developments, the fishery sector could not efficiently supply the population, although the per caput consumption was very low: 3.5-4 kg per year.

At the beginning of the 1980s, specific importance was given to the increase in the number of fishing vessels. This focused on the renewal of the existing old fleet of trawlers with 40 vessels of 400-575hp and the construction of 30 vessels of 300hp for sardine fishing, which would replace the almost obsolete sardine fleet in Vlore and Shengjin. After this project, the

construction of 20 small fishing boats would begin the modernization of the inshore artisanal fishery for all four marine fishing enterprises. Pelagic fishing by pair trawls vessels would be the main direction in the future.

The Italian experience was quickly applied to Albania. Within six months for pair trawlers, 12 pairs of boats were in operation. This resulted in an increase in production of 20%, and, most importantly, the cost was reduced by 30% in comparison with the traditional way of trawling. During these years, a new activity was started: the fishing of marine molluscs such as clams etc., based on the experience in Italy in 1982. Five specific vessels for this type of fishing were ordered. During the first year, the catch of one vessel here was five times more than the catches off the Italian coast. The export of molluscs to Italy reached its highest levels. The mussels of Butrinti rose to 10,000-12,000 kg/year; fish and other bivalves rose to 3,000-4,000 kg/year. With the aim of increasing the production of fish for the domestic market, the export of specific species, such as molluscs and high-value fish species, was increased by importing multiple amounts of some species that are consumed traditionally in Albania. The increase in the production for export allowed a reduction of the financial losses in the marine fisheries.

In the early 1990s, the difficult, rapid transition from a centralized to a free-market economy began. There was a change to an unfamiliar capitalist system, but with the absence of the necessary experience and a great lack of equipment etc. after the exodus in March and August 1991, the situation in the fishery enterprises was very difficult. During this time, the problems in obtaining necessary equipment and material, especially fuel, started. The fear of vessel high jacking brought a total shutdown of the fishing fleet.

At the beginning of 1993, the gradual privatisation of fishing vessels began. Some of the crew left, but they were compensated financially for the part of the vessel value that belonged to them. This value was increasing continuously, in line with monetary inflation. According to the clear policies and attention of the government, during this time several laws were approved, including ordinances and other legislative improvements for the development of common activities in the fishery sector. Advisory enterprises for the catching and processing of sea products were established. One of them was the Conservation in Durres, which organized the anchovy fishing, with the help of experts and equipment from Italy, and completed the industrialization of this species. At the same time, in Lezha, two processing lines for the anchovy were established and in the Kavaja farm the cultivation of shrimp was started and continues today.

The transition period brought essential changes in the structure of the fishing fleet. These changes included the replacement of the high fuel-consumption vessels, constructed in the shipyard, by smaller vessels with engines that consume less fuel. Of the 50 fishing vessels constructed in the shipyard with engine power 300-575hp, only 15 continue to work in the fisheries today: 12 of them, of 300hp and 3 of 408hp, while others were converted for transport and the rest were seized by neighbouring countries for illegal activity. Meanwhile, about 150 vessels of different types have been imported from Italy and, recently, from Greece, these are mainly trawlers and small boats with engines of 200-400hp. However, it

should be realized that this fleet is relatively old, over 25-30 years, and badly maintained, owing to the lack of infrastructure for the repair of fishing vessels.

In 1995, in order to complete the legal framework which had many gaps and absences for this important sector of the national economy, the Fishery Directorate issued a new law on fisheries. After many discussions, studies and contacts with various professionals, economists and legal experts, the Albanian parliament approved the law on 5 April 1995. This was a very important step for the organization and functioning of fisheries throughout Albania. In this law of 1995 and the relative by-laws and regulations, there are many articles that are linked to the protection of fishery resources and their rational and sustainable exploitation.

To support the law on fisheries and associated by-laws, a Fishery Inspectorate was organized by the Fishery Directorate in the Ministry. In spite of the work done and the organizational measures taken in compliance with the legislation during the transition period, it was not possible to avoid the damage already done to the country's fishery resources, especially during the first years. The greatest damage was caused inshore by illegal fishing methods using explosives. Lately, as a result of the measures taken, an improvement has begun in this direction, it is, however, far from achieving the protection of these waters not only from the illegal fishing, but also from the point of view of general environmental and biodiversity protection and the preservation of endangered species.

During the transition years, the marine fishery in Albania has faced many problems, notably those associated with production, socio-economic aspects, and those of an ecological nature etc. The reasons for such a situation are related to various factors and circumstances, such as: structural changes in the fishing fleet during the transition period, new ways of management and marketing, total absence of the necessary infrastructure to support the fisheries and lack of qualifications for the employees in the sector.

Today, the fishing fleet consists of 212 vessels, concentrated in four ports: Durres, 85; Vlore, 72; Shengjin, 30; Sarande, 25. The main fishing method is trawling, which covers about 85% of marine fisheries; a small-scale inshore fishery with small boats that cover 10-12% of the sardine fishing and with very small boats that cover only 2% of total catches. During these years, the fishing fleet has made evident structural changes, switching from big metallic vessels constructed in the shipyard of Durres, to small boats of 200-hp, which consume less fuel per unit time than the big vessels.

The change in the fleet structure was also accompanied by the substitution of moderate-size trawl nets by much larger ones, which, together with other factors such as fishing inshore, intensive fishing during the reproduction period, abusive fishing with dynamite and other forbidden equipment, etc., resulted in the depletion of some of the main fish species in the Albanian inshore waters; this included dentex, sea-bream, barbel, and others. Nowadays, in the fishing fleets of all four ports, about 600 fishers are employed, this activity being the only source of income for their families.

This important fishery also provides employment for about 300 other individuals involved with wholesale markets or retail shops, vessel repair, mechanics, electricians, net makers,

carpenters, and so forth, as well as those who invest time in the construction of fishery establishments, the centres for the collection, processing, storage and selling in the domestic market and for export in accordance with the EU standards. Additionally, there have been open workshops for the repair and servicing of fishing vessels.

The main problems of present concern to the marine fisheries are the high price of the fuel used by fishing vessels, the absence of facilities for the repair of fishing vessels, such as slipways and dry docks, the absence of wholesale markets for selling the fish, and the total absence of technical and professional standards.

The fuel price is being solved, which will have a positive impact on the economics of marine fisheries. The lack of facilities in Albania for the repair of fishing vessels forces such repairs to be made in Italy or Greece, draining not only foreign currency but also time. The repair services in the shipyard in Durres are currently 40-50% higher than those ones in the yards of Italy and Greece. On the other hand, there are plans to construct wholesale markets, which are mandatory facilities because in these markets the fish reach realistic values. Tax evasion and uncontrolled and unlicensed fishing can thus be avoided.

In particular, a real problem for the fishing fleet in Durres is the lack of a final decision on the site where the fishing port will be constructed. This is an obstacle for the quayside mooring of the vessels, the repair and processing of the vessels and above all the technical guarantees for people and equipment. This is causing a delay in the implementation of the World Bank project for the construction of some port infrastructure facilities in Durres. Implementation of this project has proceeded in the ports of Vlore and Sarande, and for the coming year actions are planned in Durres and Shengjin. The project is based on some important amendments in the existing law. Essentially, the project has responsibilities that should make the fishing communities (owners and fishers) the administrators of fishing ports as well as of fishery resources in the available fishing grounds. All this will become possible through the foundation and consolidation of Fishery Management Organizations. As of today, organizations in Vlore, Sarande and Shengjin have been established and the one in Durres is in process. The Ministry of Agriculture and Food, with financing from the World Bank, will intervene in the development of the existing quay wall, the construction of refuelling facilities, the construction of the centre for the corresponding organization, with the necessary space, vessel repair and maintenance workshops, etc. The implementation of this project would be of great help to all fishers.

Another very important problem that is facing the fishery sector is the total absence of technical and professional standards. A lot of private businesses cannot operate, owing to the lack of qualified fishers, notably skippers, master fishers, who are the most important members of a crew on board a fishing vessel (from a technical point of view), chief mechanics and engine specialists, who should have knowledge not only of the main equipment, such as the engine, winch, etc., but also of electrical and electronic problems. It is obvious that the gaps that currently exist in this field directly and adversely affect the production rate in the fishery, thereby reducing the effective fishing time etc.; this is the main cause of the increase in the production costs which are paid by the boat owners. It is proposed that the Ministry of Education and Science should open specific courses at the professional

high schools, beginning with two or three professions as stated above: skippers, master fishers and engineers for a period of two to three years. There are currently very few people or institutions providing such training. Within the fishing fleets, not many people are employed as part-time teachers and some have completely quit this activity. The objective should be to complete repairs on board, with the exception of the construction of new equipment and major repairs, which should be done out of the water. In order to achieve this, viable conditions for the construction of the working spaces should be created and teachers of theoretical and practical lessons should be given support.

Although the data on catches during the last ten years are not very precise, owing largely to the unlicensed fishing and undeclared catch (judged from the calculations for specific ships/boats monitored in different seasons of the year), results show that the production today on the country-wide level is half of that before the 1990s. Before the 1990s, the best annual production was in the marine fisheries, but only in the trawler fishery (leaving out the purse-seiners of which 60 of 400-575hp were employed in the whole country), the catch was about 50,000 kg/year; nowadays, with about 100 trawlers of 200-600hp operating, the catches are approximately 25,000-30,000 kg/year. The number of fishing vessels that are operating in depths of more than 200m is very low. The main reasons for this are that fishing in great depths requires the highest technical and professional qualification, good technical security of the vessels and the organizational measures for fishing in groups of vessels, in order to increase the safety for the vessel and the crew when fishing under bad weather conditions. Another requirement is for advanced equipment on board, mainly refrigerators and cold storage, as well as ice machines; such equipment is, as of today, still not present.

Table 2 Albania: catches (tonnes)

Category	2001	2002
Marine catch, of which	1466	1956
trawl	1190	1721
pelagic	120	80
purse seiners	156	155
Inshore fisheries	116	90
Coastal-lagoon fisheries	240	235
Inland waters	1588	1373
Aquaculture	35	108
Molluscs	150	350
Total catch	3595	4112

Source: FAO, Fishery Country Profile

3 Socio-economic survey of the Albanian marine fisheries: objectives and methodologies

3.1 Objectives of the study

The main objective of the study was to determine the principal socio-economic characteristics of the fishing sector at the national and regional levels. This aim arose from a series of preliminary considerations. First, it is important to gain insight into the social aspects of the fisheries, not only at a local level, but also in the national and international contexts. A key issue is the awareness of the importance of the fishery sector, the resulting strong inter-relations among, and the conditioning of, the social, structural, economic and political profiles of the region, as well as of the management and effectiveness of local and regional assistance.

The main objective of the study was to determine the principal socio-economic characteristics of the fishery sector at national and regional level. This aim arose from a series of preliminary considerations: firstly, the well-documented importance of gaining an insight into the social aspects of the fisheries not only at local level, but also in national and international contexts. Further key issues are an awareness of the significance of the fishery sector, in terms of the dynamics of the inter-relations between the social, structural, economic and political profiles of the region, as well as how these work to condition the fishery sector; another aspect to be considered is fishery management and the effectiveness of local and regional assistance.

In the past, social aspects of the fishery sector have often been neglected; the complexity and interdependence of the social, economic and political profiles proved somewhat difficult to grasp. More recently, an awareness of the importance of this aspect of the fishery sector has grown in national and international contexts, thus determining a need for deeper knowledge and for further investigation which has promoted the development of research in this field. It is within this context that the analysis of Albanian fisheries is to be found. This study, the intention of which is to fill a knowledge gap found in most developed countries and not typical just of Albania, aims at tackling a work initiative with progressive improvement, with a view to placing Albania in an advanced situation in an international perspective.

The socio-economic aspects considered relevant were characterized under three headings:

- The individual fisher, the basic sampling unit of the survey
- The crew, as a second level of social aggregation
- The maritime district

For each field, the study sought to point out the characteristics of each unit therein; i.e. the interactions of units within the same field. To exemplify, it was necessary to know both the social and economic characteristics of each fisher and the forms and methods with which this individual interacts with other local fishers. The same procedure was used for the crew and the maritime district. The emphasis placed on the interactions requiring attention in the study stems from the difficulty to reconstruct the systematic relations from the aggregation of the results with respect to each unit examined only on the basis of their individual characteristics.

After the fields of study were defined, the next consideration was to decide the precise socio-economic information to be collected. The individualization of such information was a result of a preliminary listing of all possible socio-economic manifestations of the different points of study. A selection of relevant information followed, the least important or redundant being eliminated, given the purpose of the analysis or the availability of the information from other sources.

Such a selection was also made on the basis of the need to control the duration and the complexity of the interviews, thus avoiding natural fallibilities in the replies and the possibilities of error. The following boxes present the main information considered pertinent at the three levels of study.

Box 1. Fishers: personal data

- Age
- Educational level (highest academic degree; correlation between educational level and work activity)
- Task, position in the crew
- Previous job/future job
- Part-time job (sector of activity, time spent, reason, % of income etc.)
- Family heritage
- Household members, by number, age, gender, job
- Minimum earnings devoted to family livelihood (share of savings on salary)

Box 2. Crew: working conditions and fishing strategy

Working conditions

- Number of relatives in the crew
- Kind of payment (salary, % of sales, etc.)
- Time of payment (week/month; beginning/end of period)
- Shared cost
- Risks at sea
- Occupational diseases, insurance and pension
- Employment contract
- Foreign people on board

Fishing strategy

- Decision level (community, vessel owner, crew members, etc.)
- Objectives (profit, household survival, cost efficiency, etc.)
- Household survival

Box 3. Maritime district: characteristic and relationships

Strength and weakness factors

- Type (owner association, trust union, co-operatives, other local institution)

Membership

- Type (owner association, trust union, co-operatives, other local institution)
- Purposes, activities, frequency, degree of satisfaction, etc.
- Decision-making (mechanism, power, enforcement, etc.)
- Local community identity and cohesion (places, occasion, institutions)
- Non-fishery local institution (frequency and kind of relation, etc.)

Market and sales

- Channels
- Market information
- Trade relationship (formal/informal, customary relation, etc.)

Inter-maritime district relationship

- Kind of relationship (co-operation, competition)
- Factors in relation (labour emigration and immigration (from, towards), information, common association, shipyard, repair, services, trade market)

3.2 The methodology of direct survey

During the 3rd AdriaMed meeting on socio-economic aspects of the Adriatic Sea Fishery¹ it was agreed to define content and methodological aspects of the socio-economic data collection. Because of their structural characteristics, many socio-economic phenomena do not change in the short run; so collection of the same data is not required as frequently as for the other economic surveys. Moreover, the reviews made by experts from all the countries participating in the AdriaMed Project reveal that the problem does not, at this stage, lie in the frequency of the analysis but in the lack of analysis of this kind.

To fulfil all the objectives of the research, instead of repeating the collection of data for all the phenomena concerned, it has been useful to carry out surveys on the different fields for which information relating to the specific socio-economic phenomena involved is required; that is:

- a survey on *Personal data*
- a survey on *Crew working conditions and fishing strategy*
- a survey on *Maritime district characteristics and relationships*.

For each of the three themes, a questionnaire that interviewers could use to obtain socio-economic data was prepared (see Annex I). For the questionnaire to be well designed and to

¹ See Forleo M, 2001.

allow a high level of valid answers, it was tested with local fishing operatives and experts, and the questionnaire structure was modified according to the responses received.

Even if there are different questionnaire structures, the person interviewed is the same with respect to the three fields, so as to allow pooling of the data on each theme. For the choice of people to be interviewed, it is important to stress that they are fishing operatives, especially ship owners and crew members, and not others figures, such as consultants or accountants.

The sample was based on 30% of the total population of fleet and fishers and drawn from the Albanian Fleet Register in 2001; overall 30% amounted to 59 vessels and 212 fishers.

The selection of people interviewed (both ship owners and crew members) for each Albanian fishing port was intended to guarantee that all strata (from small enterprises –catches of vessels less than 12 Mt, to industrial fisheries) were included. Annex II explains the methodology of the sample design and presents some descriptive statistics of the sample.

For the success of the survey (in terms of a high rate of valid answers and good quality of the information), experience suggests that particular care can be given to choosing the interviewers and to their experience with fisheries. Interviewers were chosen among people belonging to the local fishery sector or who were well known to the local community as being well informed about the subjects of the survey. For the same reason, before starting the survey, the whole project was introduced to the local fishery community by a key local expert who clarified the aim of the research, being of exclusively scientific nature, and the commitments, namely time and care to be taken with the questionnaire, required of those interviewed. Besides that, the questionnaires were tested on the same fishing operatives.

Data collected were organized in a data base structured to insert, modify and browse information and to extract some basic statistical analysis and advanced statistical management of the archive according to the questionnaire structures (for more details about the data base see Annex III). The data collected were analysed for each phase on the basis of the more common descriptive statistics and on the correlations among variables. At the end of the three-step data collection process, the results of each step are interrelated to produce a complex socio-economic profile of each maritime district and of the fishery sector overall in Albania.

4. Socio-economic aspects of the Albanian marine fishery sector: main results

The following paragraphs are dedicated to the presentation of the results that have emerged from the direct enquiries made of the sample group of Albanian marine fishery operatives. The data are first analysed at a preliminary level on the whole sample, highlighting the main results with respect to the individual, the crew and the maritime district, according to the structure of the interview questionnaire that is given in Annex I.

A more articulated analysis of the data follows, considering the professional roles; results are presented when interesting differences are found between the professional categories

identified, still with reference to the three areas of enquiry; individual, crew and maritime district.

In section 5 a reading of the data for each fishing port is given in order to outline the individual characteristics of each and to highlight similarities and differences among the Albanian maritime districts.

One hundred and eighty-seven fishery operatives replied effectively to the questionnaire; these are specified by maritime district, the role in the crew and the vessel dimensions, so as to guarantee that the sample is representative in each stratum (see Annexes). In order to comprehend how representative the sample is, one can refer to the official data provided by the Albanian Fleet Register, in which 198 vessels and 706 operatives are registered for the year 2001. It is difficult to quantify² the existence of segments of the fishery sector that are not detected through the official register and this clearly makes the sample less representative. This knowledge does not make the enquiry less valid; however, it should be taken into consideration and some caution is required in the reading of the results that emerge.

4.1 The profile of fishers in Albania

The study of the personal characteristics of the fishery operatives within the Albanian marine fishery sector begins with the study of the professional roles held by the 187 operatives interviewed. The role within the crew is not simply information that is useful to understand the competences of the professionals observed in the maritime districts, it also represents a variable that explains the diverse attitudes and opinions of the units studied, both in the individual sphere and in the collective spheres of crew and maritime district.

Table 3. Crew position, frequency and percentage of the whole sample

Owner not operator	14	7.5%
Owner operator	47	25.1%
Master-fisher	32	17.1%
Motor mechanic	30	16.0%
Deck hand	64	34.2%

In order to have a wider representation of the professional roles, the sampling units were constructed so as to include the main roles within the fishing industry: besides the vessel owners, the sample covers the roles of the crew on board, the master-fisher, the motor mechanic and the deck hand. In the category “vessel owner” there are two clearly separate cases: that of the director of a fishing enterprise who is responsible for the factors relative to the company’s productivity and who takes the risks relative to the company, but who does not

² In particular, this problem is noticeable in the small-scale fishery sector and for the presence of foreign vessels that operate without a licence. The presence of vessels that are not registered also has an impact on the data concerning employment within the sector that is difficult to quantify beyond the official data. *The fishery industry in Albania*. FAO EASTFISH, Fishery Industry Profile, Vol. 15, 2000.

take part in the fishing activity, and who is called the owner-entrepreneur or owner-not operator; and that of the owner of the fishing enterprise who also works on board, undertaking fishing activities, who is called the owner-operator.

Table 3 shows the breakdown of the sample into the individual positions within the crew³. The division of the sample is quite well balanced between the two owner roles, the two intermediate figures of master-fisher and motor mechanic and the lowest role in the crew, that of deck hand. This balance in the representation of the roles in the sample guarantees that the overall results of the direct survey are not conditioned by the prevalence of one professional role over another.

The study of the individual profile of the fishery operatives proceeds with the disclosure of some personal statistics. The division into age groups shows that the prevailing range is between 36 and 55 years old (73%). The numbers of individuals at the two ends of the age range, the oldest and the youngest, are fairly well balanced. Altogether, the demographic breakdown of the sample of fishery operatives would not appear to demonstrate a problem of an ageing workforce. For the most part, those interviewed were married with children.

Table 4. Crew by age class			Table 5. Status			Table 6. Number of children		
<i>Age class</i>	<i>Freq.</i>	<i>%</i>	<i>Status</i>	<i>Freq.</i>	<i>%</i>	<i>No. of children</i>	<i>Freq.</i>	<i>%</i>
18-25	14	7.5	Married	161	86.1	0	26	14.0
26-35	28	15.0	Single	24	12.8	1	26	16.0
36-45	67	35.8	No answer	2	1.1	2	79	48.8
46-55	68	36.4				3	43	26.5
Over 55	10	5.3				4 or more	13	8.0
	187	100		187	100		187	100.0

Considering the status and the age of the fishers together, the group of unmarried fishers has an average age of 26.2 years, while the married fishers are on average 44.9 years old. The average age of those interviewed who are not married was lower than the average age of marriage, which was 29.3 years for men in the year 2001, according to the data provided by the Albanian National Statistics Institute. However, about a third of the group of unmarried individuals was over 29 years of age, while only 2% of those who were married were under 29.

The level of education of the fishers interviewed was rather low. Fifty-five per cent of the fishers only have a primary level qualification and over 43% only have a secondary level qualification⁴; just 3% have a university degree.

³ In the case of operators with several roles in the crew, the highest position in the hierarchy was assigned.

⁴ Data provided by the Albanian National Statistics Institute indicate that, in the public sector, the percentage of individuals with secondary education is 50%, 37% have a degree, and the remaining 13% of the employees have the lowest level of education. It is not possible to compare the level of education of fishery sector workers with public sector workers because the latter sector uses means of selection based on the level of education. It would be more opportune to compare the fishery sector with other private sectors, in particular agriculture, if these data were available, for the purpose of making a comparative evaluation of the educational level of the workforce between the fishery sector and others.

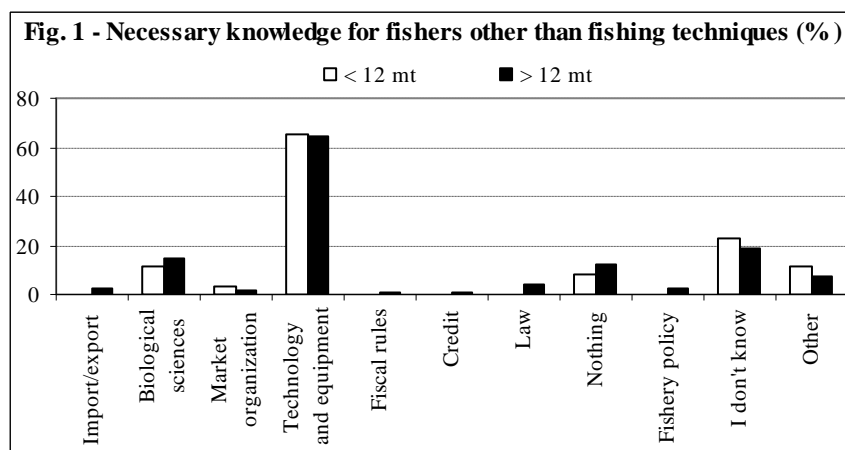
As may be expected, the work of the fishers does not end with the operations at sea on board the vessel; it also includes further activities on shore: routine vessel maintenance (58% of those interviewed), engine maintenance (39%), cleaning of the vessel (27%) and unscheduled vessel maintenance (13%).

Because of the multiplicity of tasks on board and on the quayside, fishing requires knowledge other than that of fishing techniques. About 90% of the sample group agreed with this statement, while the remainder did not believe that other skills or knowledge were necessary (Table 7). Although the opinion concerning the need for knowledge other than of fishing techniques was widely held, it should be underlined that the additional skills required are very closely bound to fishing; indeed the main need felt by 65% of the individuals was for knowledge of the fishing techniques and gear on board. Other elements of knowledge were considered relatively unimportant, such as marine biology, aspects of management concerning the industrial processing, markets and policies. The main reason for this is that these latter elements concern above all the owner; on the other hand it also shows that those interviewed have a limited vision of the knowledge necessary to carry out fishing and of their role in the crew to which they belong. Moreover, one fifth of the fishers were not able to give a clear reply to this question in spite of the wide range of knowledge fields put forward.

Table 7 Skills, other than fishing techniques required

<i>Skills</i>	<i>%</i>
Technology and equipment	64.7
Biological sciences	13.9
Law	3.2
Import/export	2.1
Fishery policy	2.1
Market channel and organization	1.6
Fiscal rules	0.5
Credit	0.5
Other	8.0
I don't know	19.8
Nothing	11.2

As can be seen in Figure 1, there are negligible differences in weight given to the single skills and knowledge areas according to the dimensions of the vessel on which the interviewee works.



It may also be noted that the small-scale fishery operatives gave replies that only covered three of the knowledge areas; technology, biology and markets. The fishers on large vessels gave a slightly more articulated view of the knowledge needed, although the most important areas are not different from those identified by the previous group.

A further matter that warrants reflection, as already mentioned, was the high percentage of those interviewed that did not have an opinion, or those who felt that only knowledge of fishing techniques was necessary. In these two cases the enquiry went into greater depth in order to understand the reasons that lead these interviewees not to have an opinion or to think that knowledge of fishing techniques alone was sufficient: the main reason for 72% of the fishers was the possibility of learning on the job; around half considered the exchange of experience and knowledge between fishers as important, while 28% of fishers believed they could learn the job by themselves. Finally, a not insignificant percentage of interviewees (31%) was convinced that no additional knowledge was required to carry out fishing.

An analysis of the replies given to this question confirmed the impression expressed above of the limited vision of those interviewed concerning the knowledge required for fishing to be carried out, considering both the narrow range of knowledge areas indicated and the opinions that excluded the necessity of further knowledge relative to the fishing techniques (Table 8).

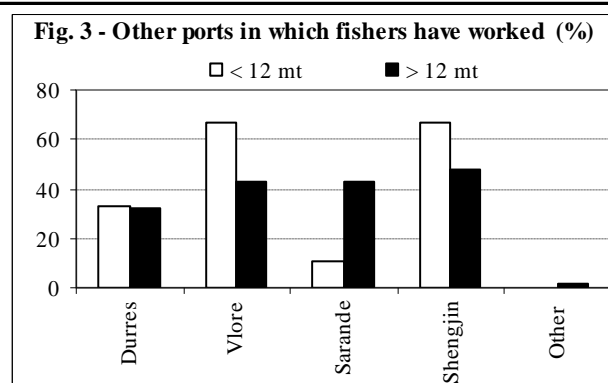
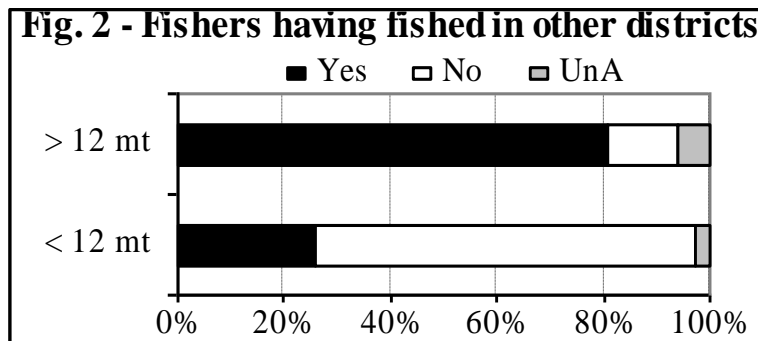
Table 8. Reasons for not considering useful skills other than fishing techniques

Reasons (in case of no other skills necessary or "I don't know" response)	% (on nothing or I don't know answer)
Sufficient on-the-job training is available	72.4
You can ask other fishers	46.6
It is not necessary to know anything else	31.0
You can learn by yourself	27.6
You can pay consultants	0
You can ask fishing associations	0

The limited vision compromises both the perceived qualification required for the proper discharge of each role within the crew and the possibilities for change or improvement in the role considered. Moreover, this result is in contrast with the need to qualify the workforce of the Albanian fishery sector which was highlighted in section 1 and underlined in the analysis of the data that emerged from the questionnaire. It is probable that the interviewees looked at the problem of professional qualification through a kind of bifocal lens, which does not bring the issue into focus when it concerns themselves, though it identifies the need when the problem is viewed from the outside. This is an important phenomenon that should be considered in the implementation of the necessary professional education development policies, in order to make the operatives in the sector aware of the need to learn and to involve them in the training programmes.

The survey revealed a reasonable level of mobility of the interviewees among the various maritime districts (Figure 2). In 75% of the valid replies (5% in the survey did not reply) fishing activity had been carried out in a maritime district other than that in which the fisher was working at the time the survey was carried out. Moreover, the data indicated that more

than two-thirds of those who had carried out their activities in a different maritime district from the one they were in at the time of the survey have in fact changed maritime district more than once. Small-scale fishers are more closely tied to their fishing areas than the fishers who work on large vessels.



Only 26% of small-scale fishers have worked in other maritime districts, compared to 86% of fishers on large vessels. In almost all cases, mobility among the four Albanian maritime districts was observed, with the greatest frequencies being those of Shengjin and Vlore (Table 9). Amongst those interviewed who had changed maritime district, the small-scale fishers had worked more frequently in Shengjin and Vlore, whereas fishers on large vessels had moved among all the maritime districts without preference (Figure 3). High inter-district mobility was not comparable with inter-sector mobility; for 68 % of the interviewees, the job as a fisher was the first job held; however, as already commented, the age within the sample group was quite high, suggesting that this was not the beginning of the fishers' working lives.

Place	Freq.	% of YES answers
Durrës	43	32.6
Vlorë	59	44.7
Sarandë	54	40.9
Shengjin	65	49.2
Other	2	1.5

⁵ The total of the frequencies is clearly greater than the number of individuals in the sample, because some have carried out fishing activities in more than one maritime district.

The fact that, for many of the individuals interviewed, their job as fishers is the only job they have held is only partly due to family tradition. Indeed only 30% of the interviewees had the same job as one or other parent, while the remaining 70% did not take on their father's job which was in another production sector, not in fishing.

Considering the data in Table 10, it is clear (from the percentages along the main diagonal) that there is no strong link between the first working experience and the generational transfer: 27% of the interviewees began working as fishers as a first job, following in the footsteps of a parent; 41% of the fishers, even though their first working experience was in the fishery sector, had not followed on from parental activity; finally 29% of fishers were not fishing as a first job experience and did not have a family tradition in the sector.

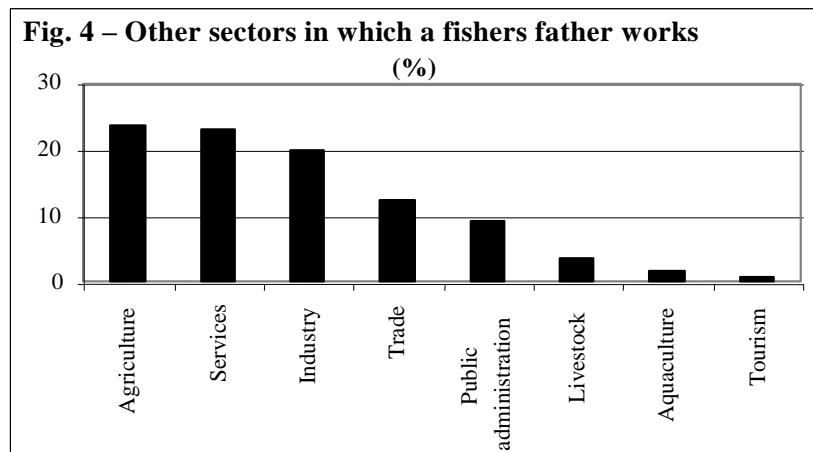
Table 10 Work experience and tradition (% of total)			
Same job as father's (fisher)			
First job	Yes	No	Total
Yes	26.9	41.4	68.3
No	2.7	29.0	31.7
Total	29.6	70.4	100

The greatest continuity in the working traditions within the fishery sector can be seen in Table 11 with reference to the roles of master-fisher (38%) and deck hand (34%).

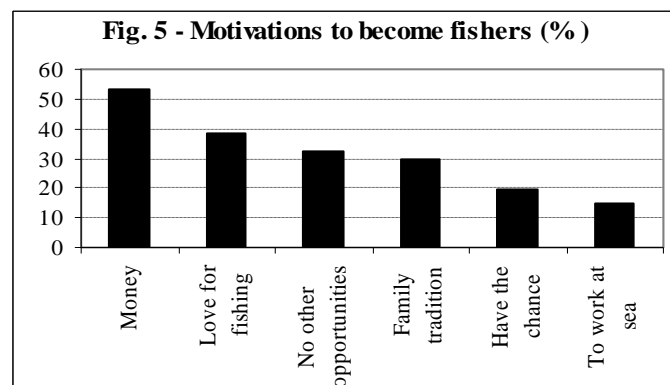
Table 11 Work experience and tradition, by crew position															
Same job as father (fisher)															
First job	Owner not operator			Owner-operator			Master-fisher			Motor mechanic			Deck hand		
	Yes	No	Total	Yes	No	Total	Yes	No	Total	Yes	No	Total	Yes	No	Total
Yes	14.3	35.7	50.0	19.6	39.1	58.7	34.4	43.8	78.1	20.0	53.3	73.3	34.4	37.5	71.9
No	7.1	42.9	50.0	4.3	37.0	41.3	3.1	18.8	21.9	3.3	23.3	26.7	0.0	28.1	28.1
Total	21.4	78.6	100	23.9	76.1	100	37.5	62.5	100	23.3	76.7	100	34.4	65.6	100

Where the continuity of a family fishing tradition is concerned, a difference emerged, albeit a small one, between the types of boat on which the interviewees worked; 34% of small-scale fishers and 28% of fishery operatives on large vessels "inherited" the paternal activity. This difference could be due to the nature of the vessel management which is more frequently at family level for small-scale enterprises than is the case for larger-scale operations. It cannot be treated just as a bequest solely for economic reasons, the investment of capital in the company, for example. The small amount of capital needed to invest in a small-scale fishing unit makes the establishment of an enterprise easier for persons who are not part of a fishing family. Vice-versa, the greater capital investment required for a large vessel can be a barrier to the entry into or the exit from the sector; on one hand, it can be a difficult legacy to pass on to an unknown person, on the other, a financial burden for a third party to acquire it.

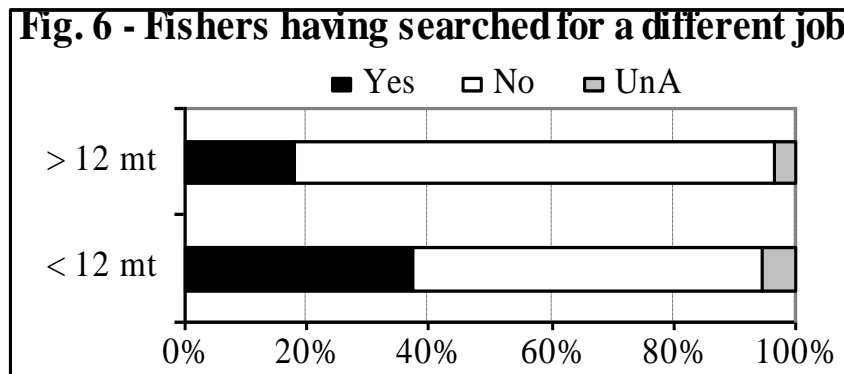
In addition to the limited influence that the family link has in passing on the profession of fisher, there is the lack of a strong inter-sectorial link between the fishery sector in which the interviewees are currently employed and the other economic sectors in which their parents are involved and which are, in more or less equal measure, agriculture, services and industry. (Figure 4).



The phenomena observed in relation to the reduced inter-sectorial mobility and the job of fisher as the first and only employment of those interviewed can be linked to the moment of entry into the sector. In the case of an intergenerational legacy, all individuals began to work in the fishery sector quite young, between 11 and 20 years old, thus gathering such specific knowledge over the years that leaving the sector becomes difficult. Among the motivations stated for beginning to work in the sector, the most common are purely economic, tending to be personal reasons associated with the socio-economic fragility of the fishers' environment (Figure 5). Economic reasons prevailed among those interviewed (54%); next there are two reasons that can be considered personal: a love of fishing (39%) and of the sea (15%). Family tradition was the reason for 30% of the interviewees, those who have inherited the job from their parents, as already discussed. Further important reasons were more socio-economic than personal; these see the individual as passive in the choice of employment: in these cases the interviewees were fishers either because there was no other opportunity (32%) or, on the contrary, because they were given the chance to do this (19%).

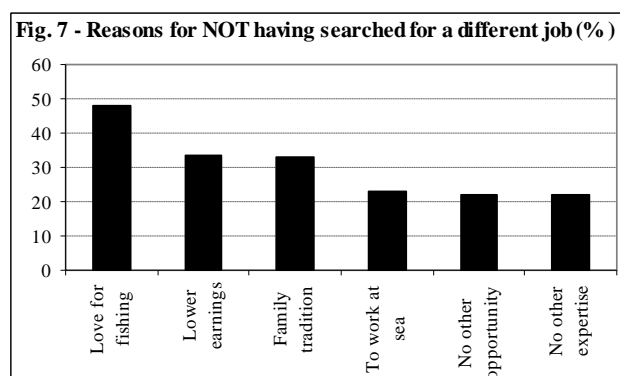


For whatever reasons the individuals interviewed chose the role of fisher as a job; 75% of them have never looked for different employment. The situation differed more or less according to the size of the vessel on which the interviewees were working (Figure 6): 17% of those who worked on large vessels had looked for alternative employment, compared to about 37% of those who were fishing from small vessels.



This difference could be due to the greater stability of the crews on a large vessel. Moreover, it should be considered that the lower economic security of small-scale fishers may drive them more readily to search for other employment. Both interpretations should however be verified, and sound conclusions in this respect cannot be drawn from the results of this survey.

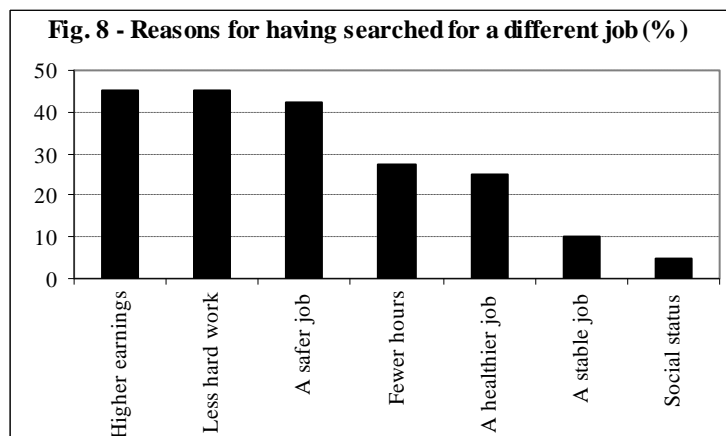
It is interesting to examine the reasons that lead to the two opposite attitudes of the fishers interviewed, (i.e. those who had attempted to change jobs and those who had not). Looking at the presence or absence of a stimulus to search for alternative employment, the negative and positive aspects, the strengths and weaknesses of the job of fisher from the point of view of the fishers interviewed can be deduced. Furthermore, the reasons for not looking for another job and the reasons for choosing this profession in the first place can give some indications as to the satisfaction of expectation or the frustration of these expectations that is felt by the operatives in the fishery sector. The first of the factors that represents a curb on the search for a different job is the personal love of fishing expressed by many interviewees (Figure 7); following this, there were two further factors of similar importance: the perceived reduction in income caused by abandoning the profession of fisher; and the need to follow family tradition in the sector. In the opinion of those interviewed, these three factors could therefore be considered as strengths of the profession of fisher in the maritime districts surveyed.



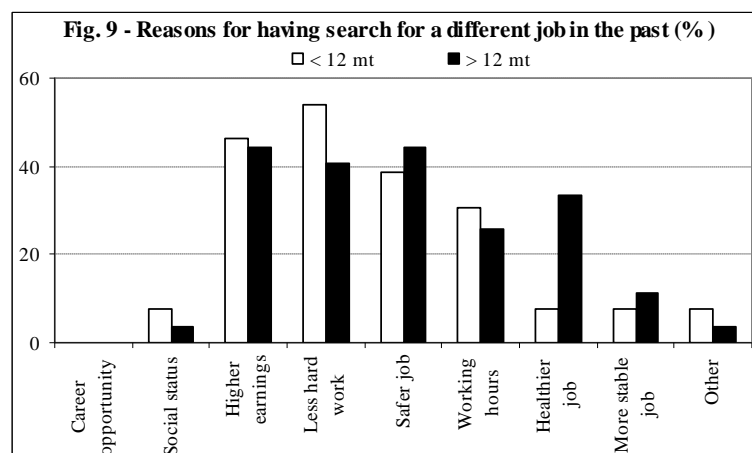
Such motivations, even though with a different order of importance, confirmed the interviewees' expectations at the beginning of the fishing job. On the other hand, among the

reasons for not having searched for a different job, importance was given also to the lack of other job opportunities, as well as to the lack of skills different from those acquired in the exercise of fishing. Such factors revealed a fragile situation in respect of the labour market in which the interviewees were placed and a passive attitude of the employee with regard to this context. These are not factors that weaken the fishing profession or the fishery sector which offers job opportunities and a good income to such individuals; it is the local socio-economic context which places the workers in a situation of dependence on the trends in the fishery sector and forces them to continue in the same job.

The factors of weakness in the fisher's job could be considered the ones that lead to the search for a different job in the past (Figure 8).



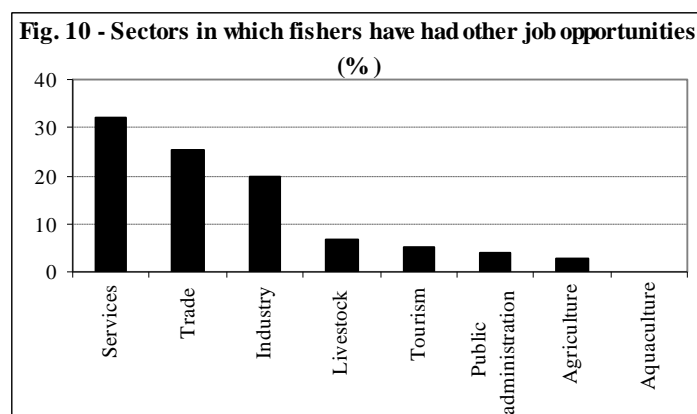
Besides the prospect of better earnings (noticed by 45% of the interviewees who had tried to modify their own work experience), reasons of a similar importance and leading to the search for a different job are linked to other peculiarities of the fisher's profession: a hard job in physical endeavour and time required; a source of significant risks to personal safety and health. Lesser reasons for searching for a different job are: higher job stability and higher social status. Splitting the answers according to vessel size (<12 m and >12 m), it is possible to identify some peculiarities in the reasons that could have lead the small-scale fishers and those working on big vessels to search for a different job in the past (Figure 9).



A difference in the attitude of the two groups of fishers emerged in respect of the health motivation which was noted more by the fishers on the big vessels than by those on the small-scale ones; the former were more sensitive to the problem of safety at work. On the

contrary the small-scale fishery operatives have been lead to search for alternative employment for reasons connected above all to the physical difficulties of the job (intensive and heavy physical work).

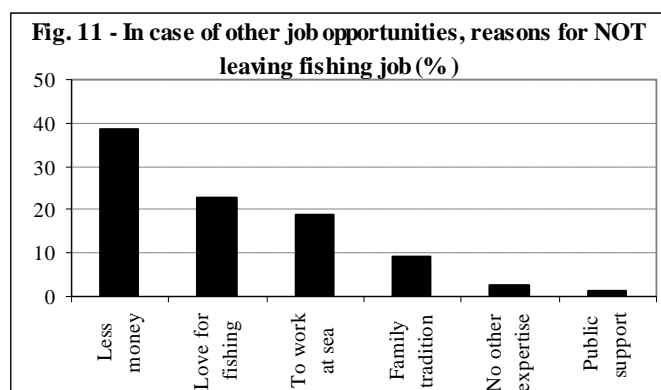
The problem of the unavailability of employment alternatives, already discussed, was further confirmed by the high percentage of fishers who have not had other possibilities in their working background, a percentage a bit less than 60% of the sample. For the remaining 40% of the fishers, job opportunities were mainly in the sectors of services, trade and industry, whereas the possibilities offered by other sectors, that is the public administration and agriculture (Figure 10), were irrelevant.



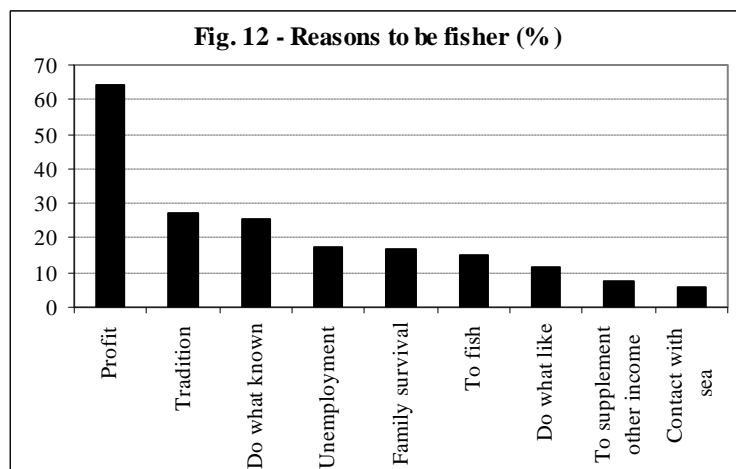
One can note the marginal role of the agricultural sector, even though this primary economic sector is the main economic sector of fisher's family origin.

To complete the picture of the fishers' expectations, satisfactions and difficulties in the exercise of their profession, it is necessary to deepen the inquiry into the reasons why the fishers who have had further employment opportunities, did not want to leave the fishery sector.

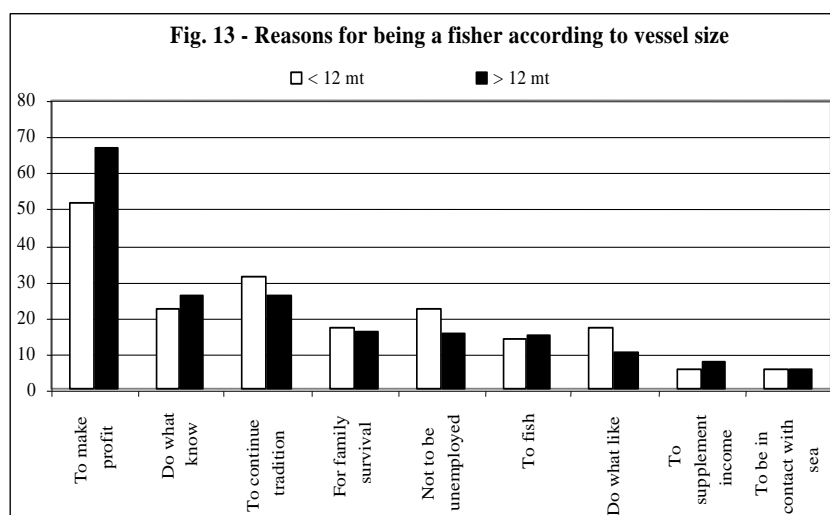
Figure 11 indicates that income satisfaction is the principal motive that retains in the fishing sector those individuals who had other job opportunities in the past. It may be redundant to say that income satisfactions has to be evaluated in relative terms, with regard to further job opportunities in the local market, and not in absolute terms. The passion for catching fish and the contact with the sea follow the economic motivation in the decision not to leave the fishery sector.



The reasons to continue fishing confirm the picture of the initial expectations and of the motivations for not abandoning the sector: Figure 12 also shows the strength of economic motivation (64% of the sample) as the main reason to exercise the fisher's job.



Such economic reason is followed by two groups of motivation of much less importance; in descending order of importance: the need to continue the family tradition (27%) and the fact of exercising a known job (26%), followed by the fear of being unemployed (17%), the requirement to ensure the family's survival (17%) and the passion for fishing (15%). The reasons for being a fisher are not so different when the small-scale and the large-vessel fisheries are distinguished (Figure 13).

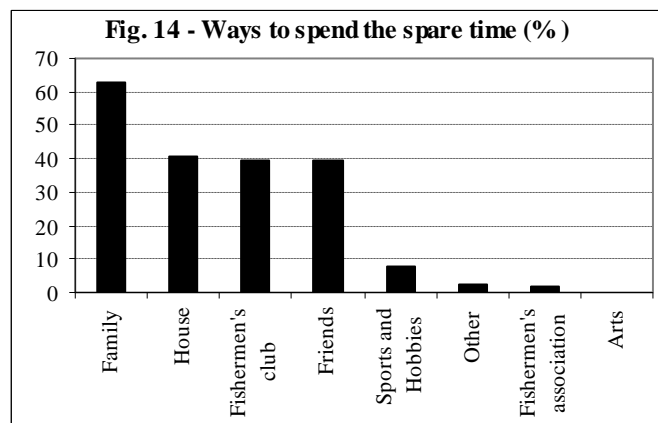


Although the economic motivation is the most important in both cases, an important difference emerges that each group attributes to all the reasons considered: the economic motive is more extensive among the interviewees who worked on big fishery vessels (67%) than among those on small ones (51%).

The fear of being unemployed, the exercising of a profession that is liked and the following of the tradition have relatively more importance amongst the workers of the small-scale fishery. Such motivations are based on strongly subjective reasons, which, on one hand, represent elements of strength, and, on the other, elements of weakness of the small-scale fishery sector, which leads to a greater attachment to the activity performed.

Full-time fishing was carried out by the majority of the interviewees; only 8% of the total number of fishers engaged in other, part-time⁶ activities. Those engaged were mainly in the trade sector (53%), hence in the services and tourism sectors. The reasons for the alternative employment were mainly linked to the economic aspects; the part-time activity embodies integration and an increased assurance of personal income stability. The possibility to better allocate the working time between the principal and the optional activities was found to be low.

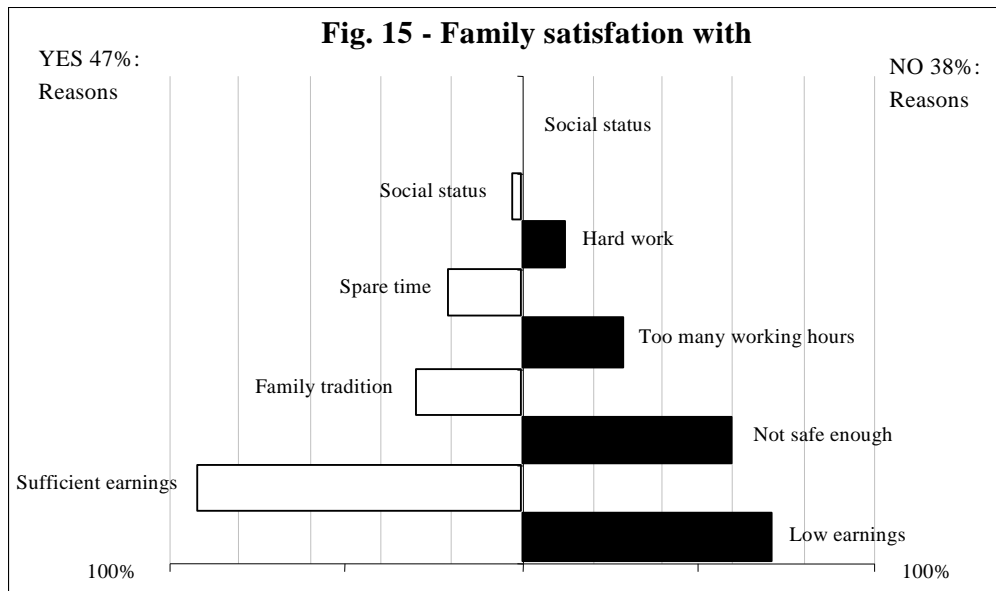
The spare time available to the interviewees was dedicated to different activities which the questionnaire referred to as the individual, family and social spheres (Figure-14). The results of the survey put the family sphere first, both in terms of taking care of the family (over 63% of those interviewed) and of the domestic environment in general. Social pastimes follow, with participation in the activities of workers' clubs and relations with friends. However, this social sphere was limited to relations within a circle close to each individual interviewed since the participation in the activities of professional associations or other activities was not indicated by the fishers who took part in the survey. The spare time dedicated to personal interests (sport, hobbies, art and cultural activities) was also marginal.



As far as the family was concerned, there were few cases in which the spouse worked outside the home. Such circumstances (about 25% of those interviewed) were, in almost all cases, the result of the need to improve the family's economic situation by the diversification of sources of income. With further reference to family life, the fishers were asked how they perceived the satisfaction within the family towards their profession; 15% of the individuals did not have a reply to this question, while a significant number (38%) thought that their family was not satisfied. Only 47% of the fishers interviewed believed that their job pleased their families.

⁶ 7% of the large-scale fishing vessels and 14% of the small-scale fishing vessels.

Figure 15 illustrates the reasons given, both by those who considered their family satisfied with the profession of fisher and those who did not.



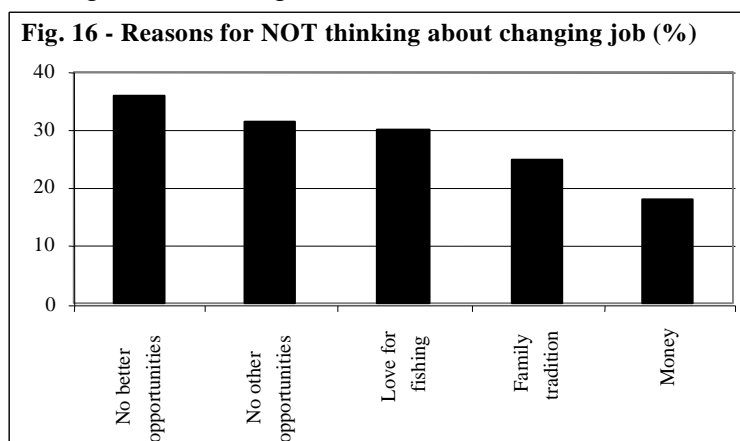
The income level was the most important factor in the assessment of family satisfaction and was among the reasons given by both groups; on one side there were those who considered that their families were content with the income and, on the other, those who felt that the lack of appreciation for their jobs as fishers was due to the low earnings. The income factor, however, had a different level of importance within the list of reasons given by each group; this consideration derived from two ways of reading the data that emerged from the replies to this question. Firstly it is important to note that the issue of income was of greater significance for those who judged the family’s appreciation positively; 92% of those who held this belief indicated that this was due to sufficient earnings, whereas the income was considered to be low by 72% of those whose family was thought not to appreciate the job held.

The same conclusion was reached if the importance given to the second reason specified by the two groups was considered. For those who were “satisfied” this was also due to continuity of tradition which comes in second place to the income factor, at 30%. For the “unsatisfied” group, the second reason for which the family was not satisfied was the insufficient level of job security and this reason was close in importance to that of the earnings; 61% against 72%. Following on from this in the order of reasons, was the amount of free time and the social status, which were both appreciated by the fishers’ families; on the other hand the commitment required by the fisher was perceived as a further reason for family dissatisfaction.

After having investigated the past and present situation, the future prospects were contemplated. In the medium term, the probability of staying in the fishery sector was very

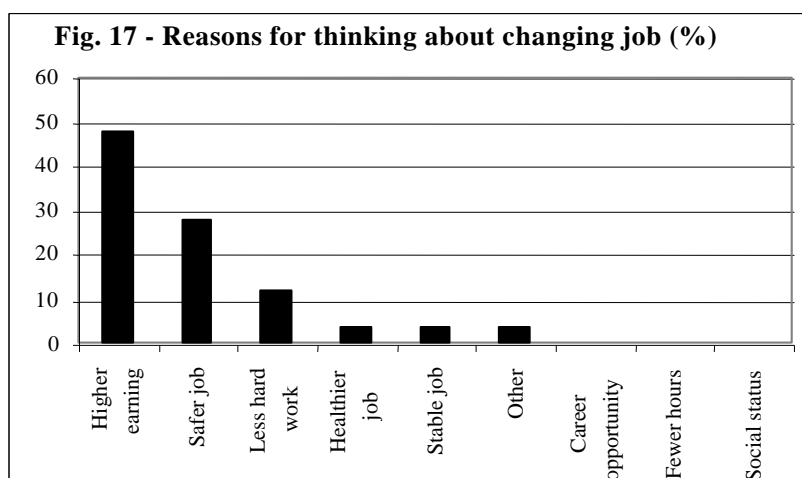
high: 81% of those interviewed did not expect to change jobs in the future, 12% were unsure, while only 7% had this expectation. Commerce, tourism and services were the areas towards which those who expected to change their profession would move.

The apparently positive picture of fishers who were attached to their job that emerged from the previous considerations is disputed by the reasons given by those interviewed who did not expect to change their job in the future. As Figure 16 highlights, the two main reasons for staying in the sector were the absence of better opportunities (36% of the interviewees) and, worse still, the absence of any other opportunity (31% of the interviewees). However, on the positive side, given the lack of alternatives, continuation in the sector was also motivated by a love of fishing. Furthermore, for a quarter of those interviewed, the family tradition was a reason to feel a strong link to fishing.



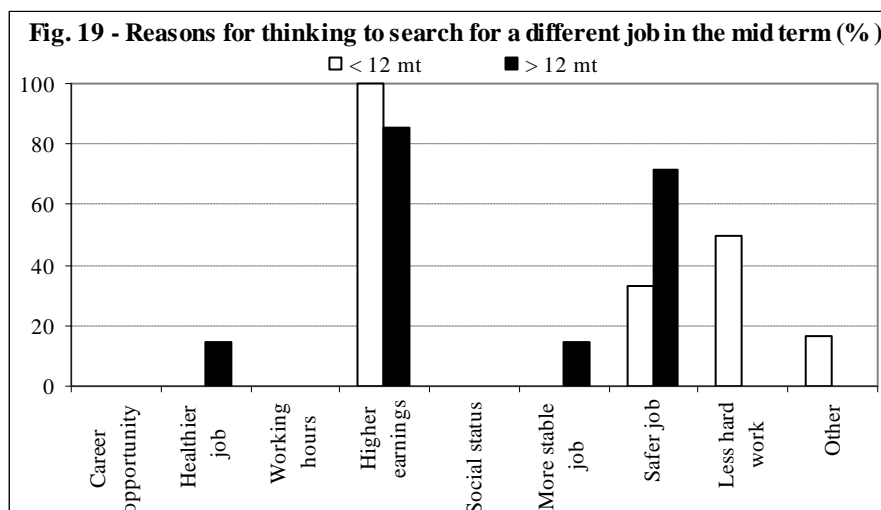
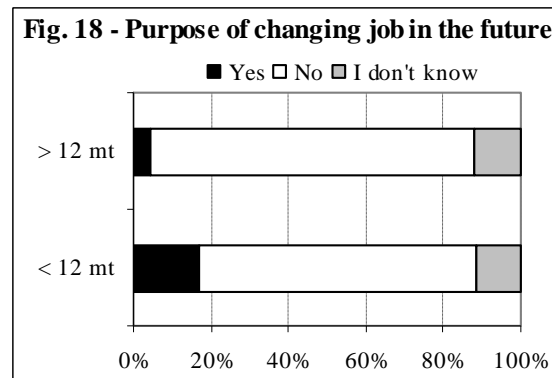
Finally, economic satisfaction, as indicated by 18% of those interviewed, was one of the reasons for which they were not planning to change jobs.

The individuals who were thinking about a change in career, although a small percentage of the sample group (7%), were driven by the desire to improve their income and by reasons linked to job security (Figure 17).



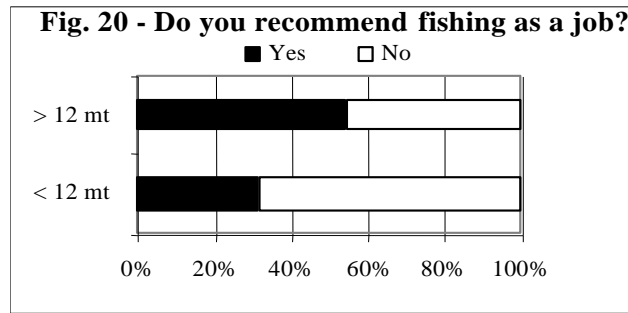
The picture of the interviewees' prospects for job change looked rather different when discriminated according to the size of the vessel and the company for which they were

working, (Figure 18). It can be seen that a much smaller percentage of the fishers that were working aboard large vessels planned to change jobs in the future (5%), compared to those who were working in small scale fisheries (17%). This result was coherent with the answers given on the issue of the search for alternative employment in the past by small-scale fishers (Figure 6), and is a further sign of the instability of work in the small scale fishery sector and of the difficulties faced by these fishers.

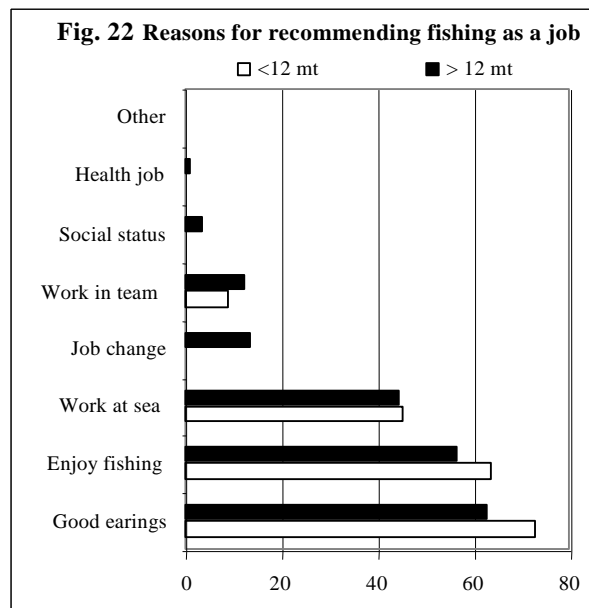
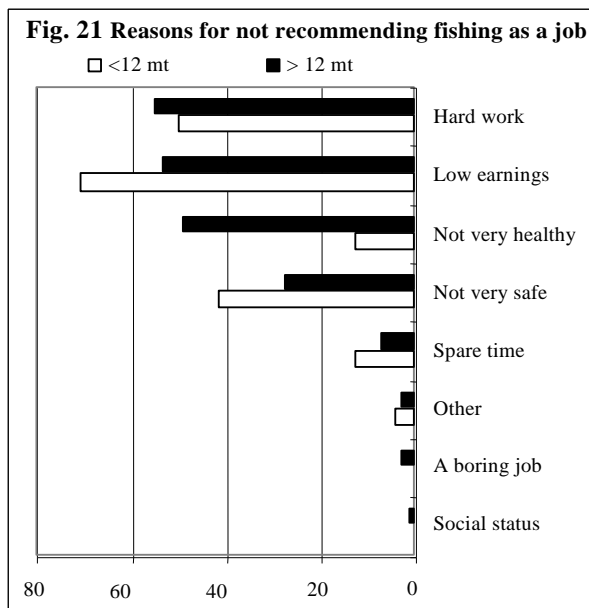


Regarding the reasons for thinking of a job change, the only significant difference between operatives on small or large vessels was that the need for greater safety on board was felt above all by those individuals that work on large vessels (Figure 19), while the improvement in earnings and the demanding work were the main reasons for small scale fishers.

As a conclusion to the examination of the profile of the Albanian fisher, the survey asked the sample group whether they would recommend the job to another individual. The answers to this question were divided exactly in half: yes/no. The reasons stated for and against this choice referred back to those indicated above on the issue of abandoning the sector or not. The replies were not so well balanced when the sample was divided on the basis of the vessel size (Figure 20); the small-scale fishers appear much more critical (70%) than those working on the large vessels (46%).



There are different reasons for this; Figures 21 and 22 set out the reasons for and against the job of fisher, based on the vessel dimensions. When the reasons for not recommending this career to others were considered, those on large vessels indicated above all the health and safety risks, whereas the small-scale fishers cited the low job security and income. On the other hand, when looking at the reasons to recommend becoming a fisher the differences in opinion according to the size of the vessel were less marked: the small-scale fishers considered income and love of fishing somewhat more important than did the other operatives.

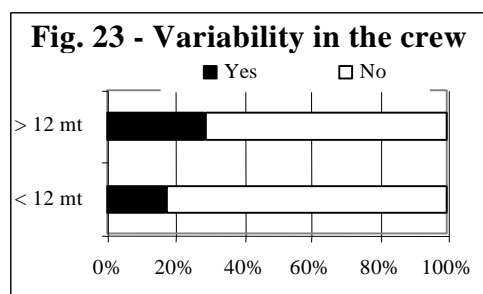


4.2 The crew: working conditions, fishing strategy and economic relations

4.2.1 Crew working conditions

The second part of the questionnaire drew attention to the crews and their working conditions.

Crews remain predominantly the same size throughout the year: 74% of the interviewees excluded exceptional situations affecting the number of the crew members. Some differences were obvious when the responses were discriminated by vessel size (Figure 23)



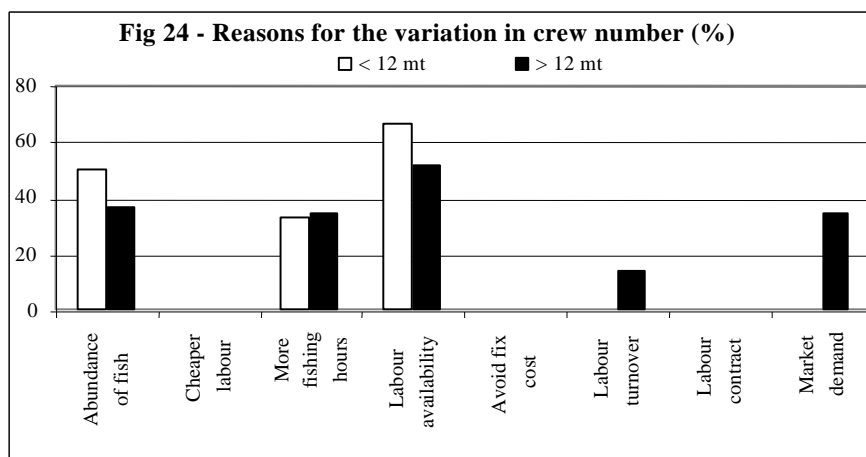
The crews of the vessels <12 m were numerically more consistent than the crews of the vessels >12 m; indeed, for the large vessels, there was no variation, according to little more than 70% of the interviewees, while for the small vessels, the percentage rose to 83%.

Table 12. Reasons for variation in crew number

<i>Reasons</i>	<i>% of YES answers</i>
Availability of labour	53.1
Abundance of fish	38.8
Increase in fishing time	34.7
Increase in market demand	30.6
Labour turn-over	12.2
Availability of cheaper labour	0
To avoid fixed cost	0
To avoid labour contract	0

In the cases of variation in crew number (26% of the interviewees), the reasons were attributable to a change in the availability of work, to the seasonality of the catch, to the variations in the fishing effort and to the increase in the demand for fish, which incited an increase in the fishing effort and landings (Table 12).

Also with regard to the motivations that lead to variation in crew size, differences emerged when vessel size was considered. As Figure 24 shows, there were only three reasons given for the variation in crew size on small vessels: labour availability, abundance of resources, increase in fishing effort; whereas for the large vessels, besides the three reasons just mentioned, an increase in the demand for fish and labour turnover were given as reasons.

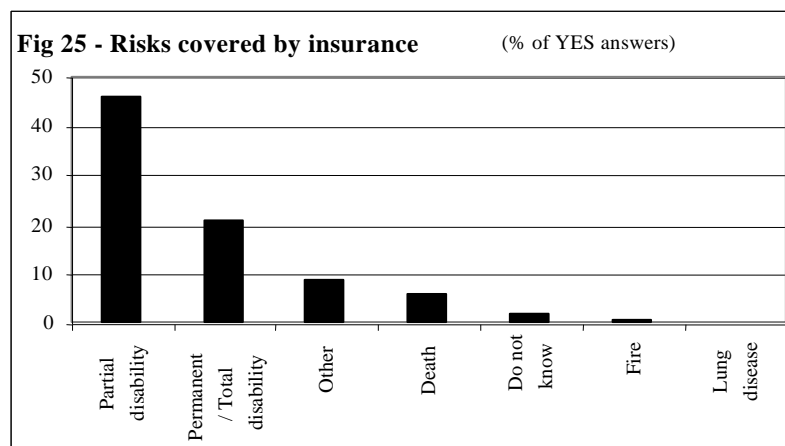


The major importance attributed by the sub sample of interviewees from small vessels to the availability of labour and fish resources, rather than to market demand, could be interpreted as follows: the greater adaptability of the fishing intensity by the small-vessel crews may be linked to factors on the supply side; the choice of level of input within the capacity constraints more than to factors on the demand side.

Fishing does not effectively make space for the involvement of women, since none of the interviewees declared the presence of women on board neither considers preferable to have them as crew member. The same was considered to hold for the presence of teenagers in the fishing crews.

Fishing did not seem to have caused big problems of occupational health: 95% of the interviewees declared that they had never had any illness linked to their work as fisher.

The spread of insurance coverage of the risks of fishing did not turn out to be higher: only one third of the fishers declared ownership of an insurance policy against such risks.



The risks predominantly covered by insurance (Figure 25) are partial, permanent or total disability. None of the interviewees answered the questions on the nature – public or private – of the insurance scheme by which they were covered.

The remaining two-thirds of the interviewees stated that they did not have any insurance related to their work. Since such insurance was obligatory, this reply could be due to the operatives' lack of information on this matter or to an illegal work situation. The main reason for the lack of insurance coverage was the excessive financial burden of such insurance (for 53% of the individuals; Figure 26). The fact that 19% did not consider an insurance policy necessary, and that 16% did not give any answer to the question, was considered a matter of major seriousness.

Only 7 out of 187 interviewees declared having a pension, five of which had an old-age pension.

The system of social-security contributions is onerous and such contributions should be declared; several explanations can be found that may be true for the fishing areas surveyed, although it is difficult to detect them or to measure their relative importance. The first

hypothesis is that, even though the contributions to the system are obligatory and, in part, the responsibility of the employers, the burden of the payment falls all or mainly on the fisher on board and especially on those in their first work experience or on those who change crew. A second hypothesis could be the presence of undeclared work, which cannot be excluded in the Albanian fishery sector. Undeclared work impacts negatively on correctly regulated work, since it exercises a form of competition that translates into economic and, above all, contractual conditions that are less favourable for those who work under law-abiding contracts.

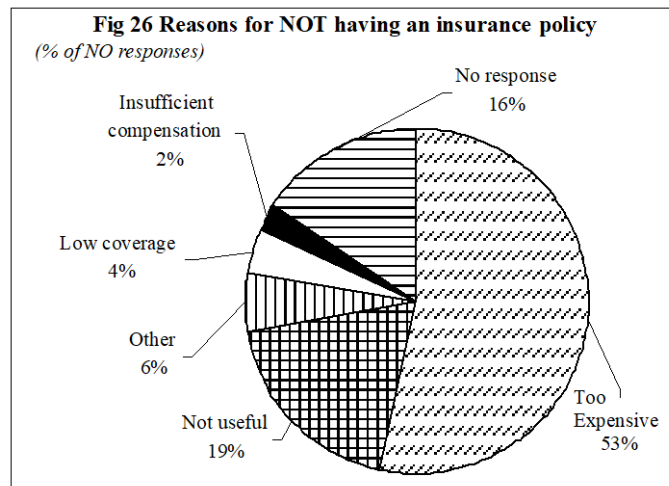
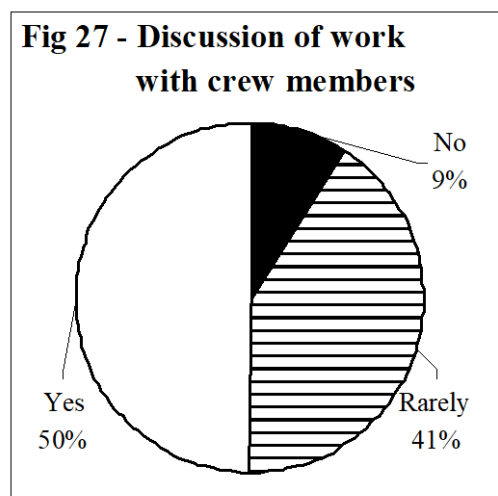


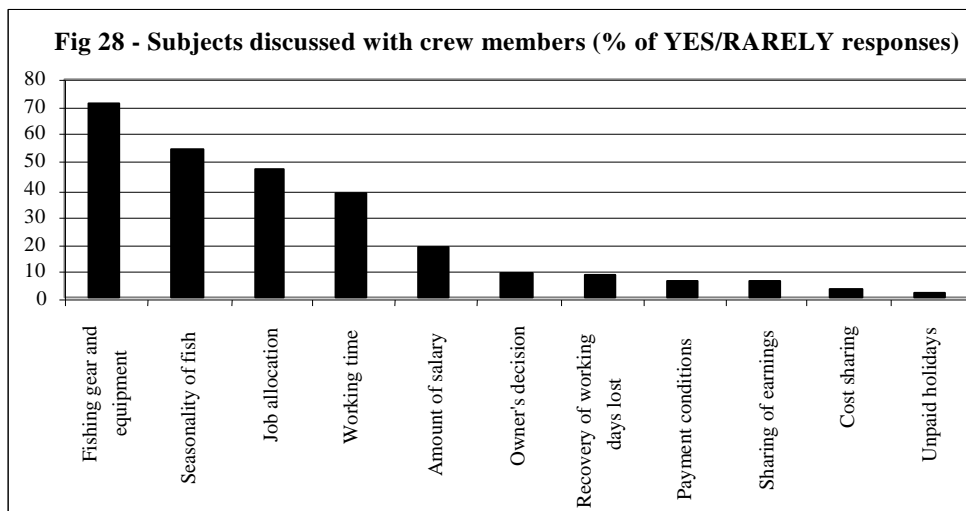
Figure 27 shows the proportions of fishers with whom their employer discussed the working conditions (yes) or only did so rarely or never.



The participation of the crew members in the decisions taken by the fishing company was sufficiently widespread among the fishers interviewed (Figure 27): 46% stated that the questions about the work were normal subjects of discussion with the crew members; 38% declared that such discussions took place, albeit rarely. The participation of the crew in decision-making was considered important not so much for the fact that it represented democratic management, but because it was linked to the sharing of the company's economic returns by the crew in the same way that the costs are shared, as will be discussed later on.

Discriminating the answers between small or big vessels, there emerged only a slight difference in the percentage of the answers attributed to the two modalities: YES—

discussions with the crew member was reported by 46% of the interviewees from small vessels, and 51%, from large vessels; NO—there was no discussion reported by 14% of the interviewees from vessels, and 8%, from large vessels.



In the opinion of about 80% of those interviewed, the main issues that should be discussed with the crew (Figure 28) were of a technical nature and concerned the deck equipment and fishing gear.

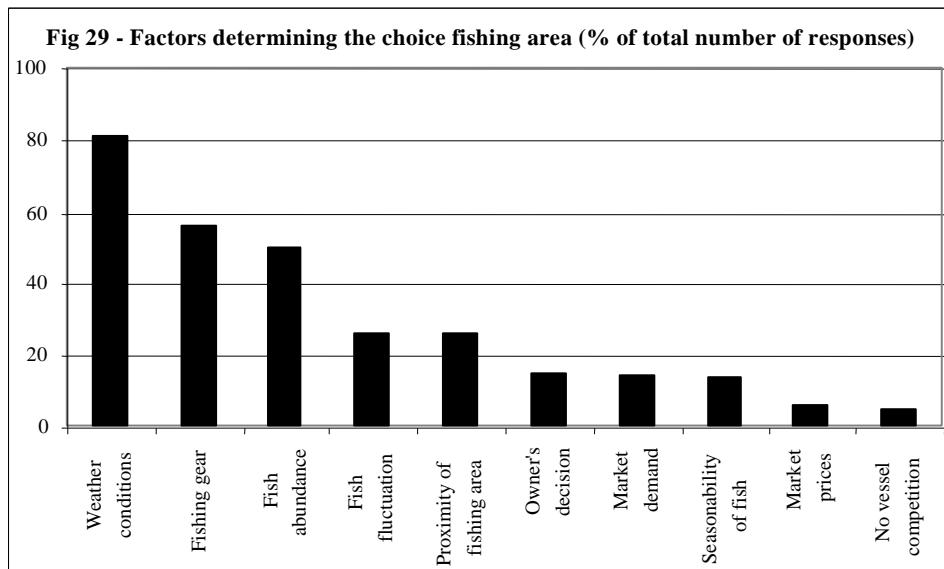
The seasonality and availability of the fishery resources and species was also considered an important subject of discussion, closely linked to the one mentioned above. In decreasing order of importance, the subjects of concern were the allocation of tasks among crew members, and the working time. The remaining subjects were considered to be much less important: the contractual relationship between owner and crew member, the level and sharing of earnings, modality of payment and cost sharing among crew members, etc.

The quality of communication among crew members did not therefore seem to be problematic, although it is clear that there were different attitudes concerning technical matters and economic relations. Moving on from the moment of communication to that of decision-making, within the crew, consideration of two key areas for the fishing enterprise revealed not only the quality of social relations on board, but also their strong economic impact: the decisions concerning the fishing areas and the intensity of fishing effort.

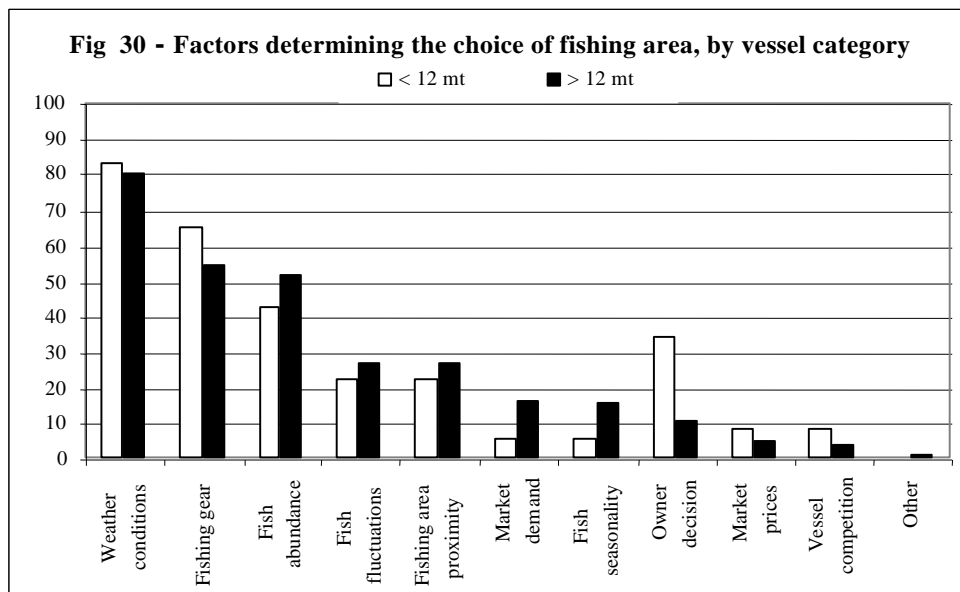
The choice of the fishing area was affected by a variety of factors (Figure 29).

Among these, the most important in the opinion of more than 80% of the fishers interviewed was the weather conditions; other factors which helped to determine the choice of 7% of the interviewees was the fishing equipment available to them and the type of fishing that was to be carried out. One obviously important factor was the abundance of fish in the fishing area. Other factors were of less importance relative to the three factors mentioned above; in decreasing order of importance, they were: following the fluctuation in the abundance of fish and the proximity of the fishing area to the port. Of marginal importance were two factors on the demand side - the requirements of the fish buyers and the market prices of the fish - as

well as on the supply side. the importance of the owner’s power of decision being modest, and the competitive pressure from other vessels in the fishing area.



Vessel size was an important variable in the definition of factors relevant to the choice of the fishing area, since it affected the nature of the answer and the ranking of the modalities (Figure 30).



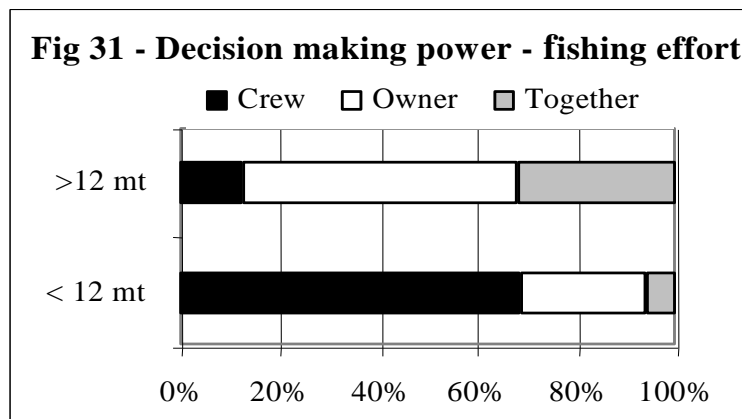
A first difference concerns the decision-making role of the owner, which was of major importance in the sub sample from the interviewees from small vessels⁷, in comparison to the sub sample from the large vessels. Owner power is the factor on which there was a major difference between the importance given to this by both groups: an importance of 34% in the

⁷ With regard to the importance given here to the decision-making power on the small vessels, it is stressed that this does not contradict the major percentage of the answers attributing the decision-making power to the crew in respect of the fishing effort.

small-vessel sample and 10% in the large-vessel group.⁸ Another factor to which the two groups of interviewees attributed a different importance was the strictness in deciding the proper scale of activity; this was considered to be determined by such factors as the type of fishing equipment, the abundance of the fish resources and the seasonality of the target species, and the level of demand. The small-scale vessels adapt to these factors only with much difficulty, compared to the large vessels: the small-scale vessels are structurally more restricted by certain production factors which do not allow them big modifications in their level of activity in order to react to changes of an economic and/or biological nature.

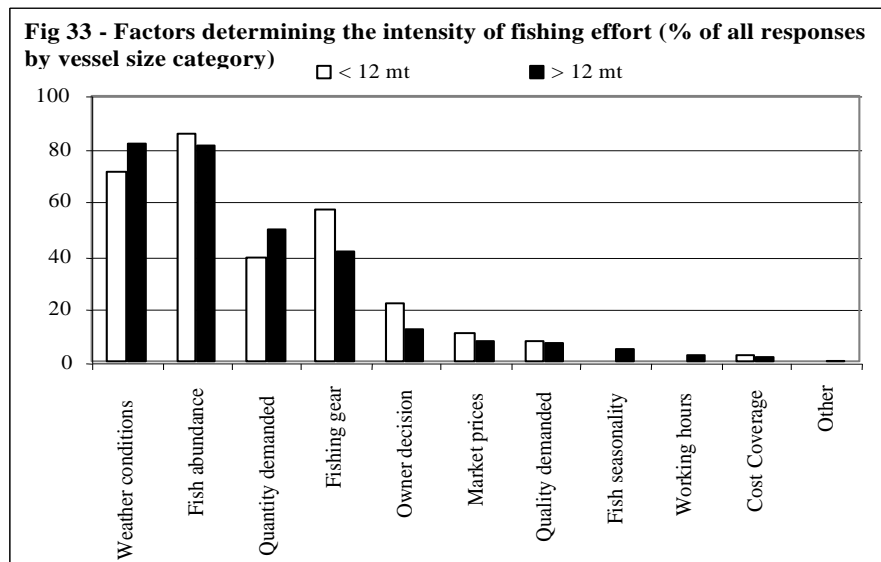
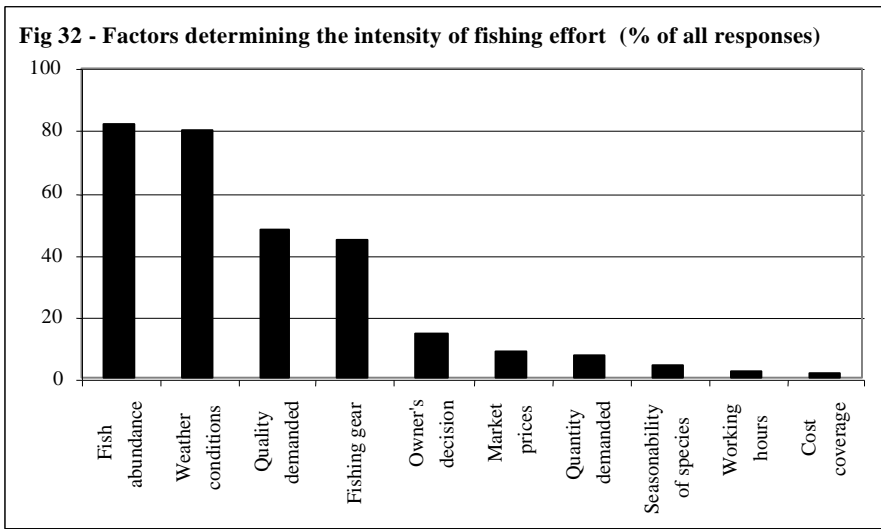
The choice of intensity of the fishing effort seem to be shared between crew and owner: 50% of the interviewees stated that such decisions were taken by both the owner and the crew; 27%, by the crew alone; and the remaining 23%, by the owner alone. Among the crew members, the master-fisher and the motor mechanic played a very important role in deciding the intensity of the effort.

The decision-making power seems to be differently stated by interviewees from the small-scale and large-scale vessels (Figure 31). The crew's role in setting the intensity of fishing effort is more determinant in the small vessels than in the larger ones: the percentage decreases from 69 % for the small vessels to 12 % for the large. In the latter, the decision-making power is mainly in the hands of the owner, rather than of owner and crew together. This difference is probably due to the greater difference between the two roles (those of the owner and of the crew in the large vessels, while in the small ones, the distinction is usually more vague.



In determining the intensity of the fishing effort, the identification of the relevant factors is even more selective than for the choice of the fishing areas. The first two factors, relevant for 80% of the interviewees, were the abundance of the resource and weather conditions; following, with a percentage of 45% of respondents, was the quality of the species in demand and the type of fishing equipment. The other factors, as Figure 32 shows, have far lower levels of importance.

⁸ Regarding the decision on the fishing areas, the view of the owner is greater than it is when the intensity of fishing effort is decided. It should also be noted that there is a difference in respect of the owner's in the decision concerning the fishing areas, according to vessel size: it is more weighty in the small-scale vessels. This difference is less marked with respect to the intensity of fishing effort. This difference can be attributed to the greater freedom that an owner has in the decision of where to fish than of how much to fish, in the small-scale sector compared to the larger-scale commercial fisheries.



Comparing Figure 32 (relative to the entire sample) and Figure 33 (the same but discriminated by vessel size category), it is possible to identify the factors according to which the opinion of those who work on small vessels and those who work on large vessels differs.

Specifically, the factors are the type of fishing gear and the decision-making power of the owner (which were more important to the sample from the small vessels), and the weather conditions and fluctuations in the demand for fish (which were more important to the sample from the large vessels).

It was therefore about differences that, as the analysis of the factors conditioning the choice of the fishing area showed, related to the flexibility of the small-scale vessels for modifying their level of fishing activity.

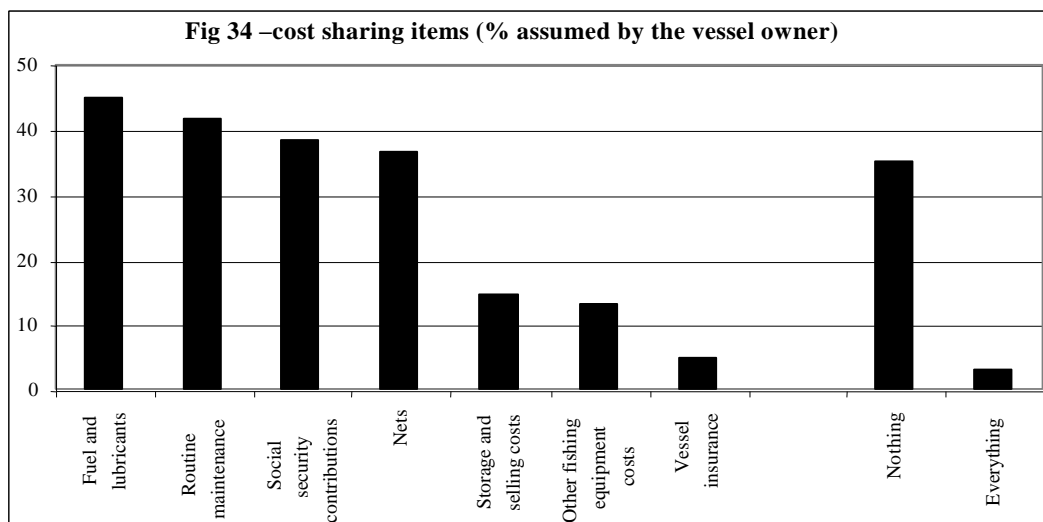
In the light of the results concerning the two decision-making areas (fishing areas and fishing effort), and not forgetting those who make these decisions (owner and crew), the factors that emerged are useful elements of knowledge for the implementation of management policies and for the control of fishing activity.

4.2.2 Economic relations among crew members

In the last part of the questionnaire referring to crews, two issues were addressed in the sphere of economic relations and, in particular cost-sharing, earnings and dissatisfaction with the working conditions.

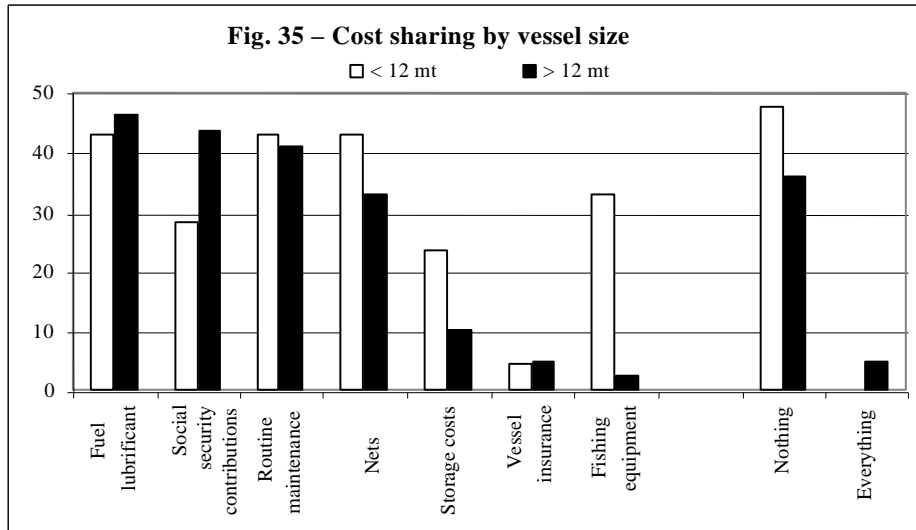
As regards cost-sharing related to the fishing activity, first of all it should be noted that, according to 35% of the interviewees, there was no cost-sharing between the owner and the crew, and there were only two cases of total cost-sharing (Figure 34).

Besides these two exclusive response groups, the principal elements of cost-sharing between the owner and crew were: fuel and lubricant consumption and other routine maintenance costs, the social-security contributions and the cost of nets.

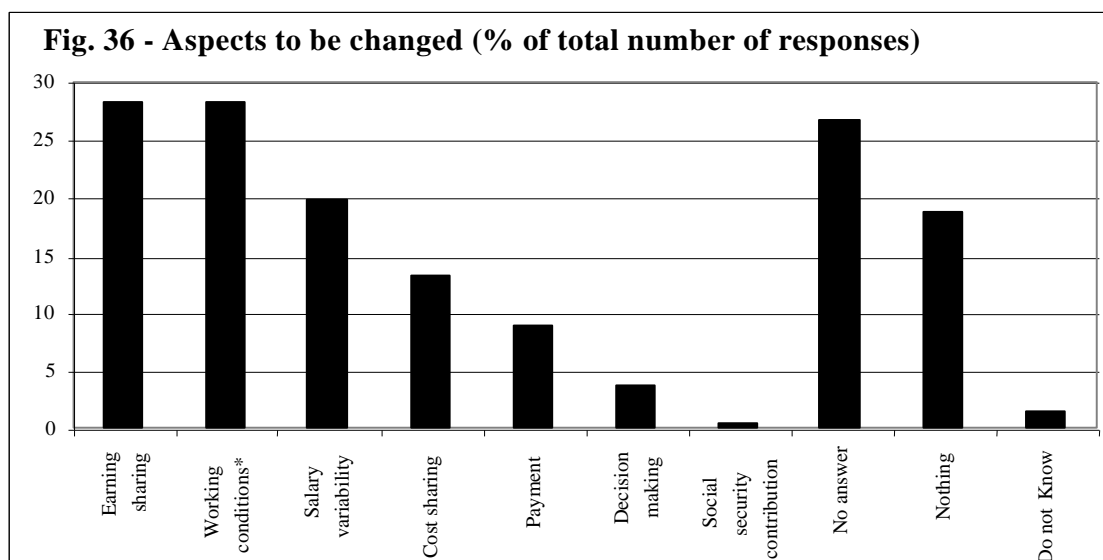


There were big differences in cost sharing according to vessel size (Figure 35). Cost-sharing between the owner and the crew was 48% for the small-scale fishery and 36% for the large vessels.

Other differences between small vessels and large vessels were the cost of fishing gear and materials: in particular, there was a higher level of cost-sharing between the owner and the crew for the equipment, nets and for the maintenance of the product, according to the sample from the small vessels, whereas the sharing of the social-security contributions was significantly more frequent for the sample from the large vessels.



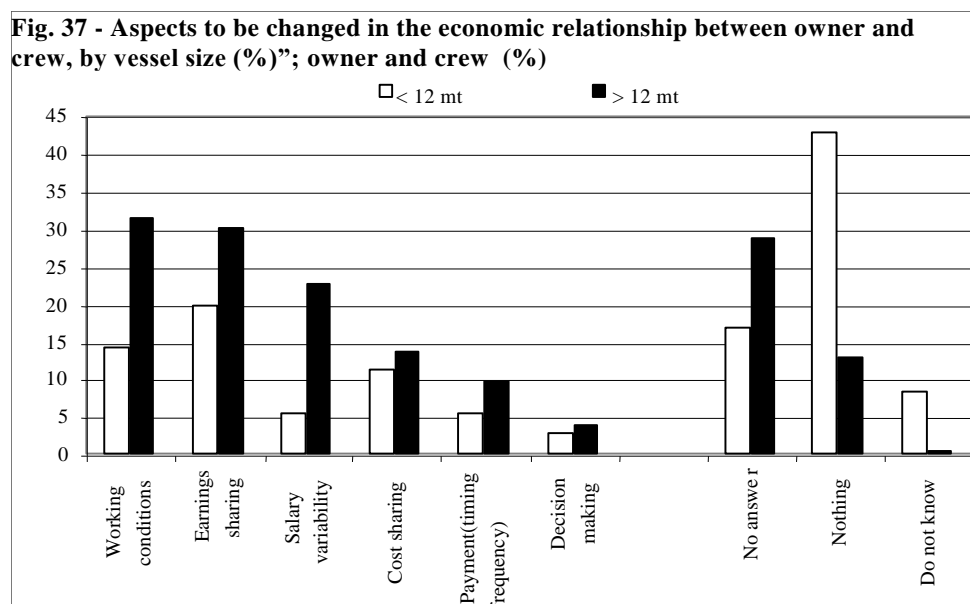
Passing from the sharing of the costs to the sharing of the profits, it should first be recalled that the crewmembers' earnings are a fixed percentage of the sale of the landings. The way the earnings are shared is the principal aspect that the interviewees would modify, depending on the economic conditions which in turn determine the working relationship (Figure 36). Another aspect, on the same level as division of earnings, that it could be considered necessary to modify concerns the working conditions, particularly the duration of the work and holidays. Depending on the mechanism for determination of the share of earnings, there were different specific situations in the level of earnings, which the interviewees put third among the elements of the working relationship which they would like to see modified. However, 20% of the interviewees declared their satisfaction with their economic treatment, which would not require any changes in the modalities of the relevant regulation.



A certain importance was given to two other issues in the ranking of the economic aspects to be modified; they were: cost-sharing between the owner and the crew members, and the modality of payment in terms of timing and frequency.

There was a significant proportion (%) of “No answers” to this question, but this should not be interpreted as an expression of generic dissatisfaction on the part of the fishers.⁹

There were strong differences in the answers given by those working on small vessels and by those on large vessels; they could be a symptom of a higher degree of satisfaction in the working relation that characterizes those from small vessels more than it does those from large vessels (Figure 37): 43% of the sample from the small-scale vessels considered that no aspect needed to be modified, whereas only 13% of the sample from the large vessels did so. No answers were less frequent in the small-scale sample than in the large-scale one. The latter stressed modifications in the working relation in respect of variation in earnings, working conditions and sharing of the utilities¹⁰.



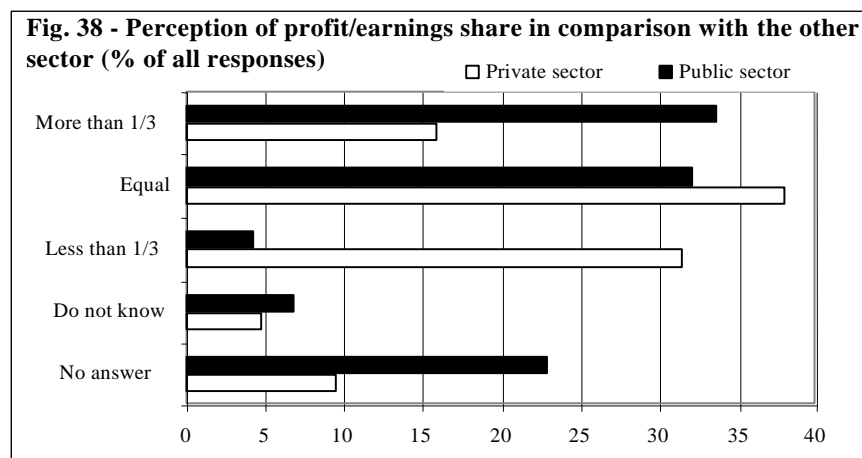
Regarding the remuneration from fishing, in the form of income, a question was asked on the importance that the interviewees attached to the income from fishing in comparison to that from other jobs, whether in the private or public sectors (Figure 38). The objective was to evaluate the interviewees’ perception of the proper level of incomes in comparison to an *average working situation* in other economic sectors, and, indirectly, their opinion on the remuneration of labour in the fishery sector.

Twenty-three per cent of the interviewees from the public sector did not answer the question, and another 7% stated that they did not know whether the incomes were higher, equal to or lower than those in the private sector (see black bars in Figure 38). Nearly 10% of the interviewees from the private sector did not answer the question, and 5% were not able to make an evaluation. As regards the remaining three options—more than one third, equal, less than one third—the answers were variable with respect to public-sector or private-sector jobs.

⁹ This could be due to the fact that the interviewees could have made a different choice, by selecting “Nothing” or “Do not know” or by giving alternatives to the replies offered on the questionnaire.

¹⁰ The higher frequency of the “No answers” category in the sample from the large fishing vessels leaves a question mark about the reasons for such a high frequency: the “all” or “none” elements of the working relationship? Or what other motivations? The analysis of the data does not allow a hypothesis on this matter; nevertheless, there was a high frequency of “none” answers in the sample from the small vessels.

Thirty-two per cent of the interviewees from the private sector thought that incomes were equal to those in the public sector, and 38% from the public sector thought they were equal to those in the private sector.



Significant differences emerged in the answers to the two other propositions—that the incomes from fishing were higher than one third or less than one third than those earned either in the public or the private sector: 33% of the interviewees from the public sector considered that the income from fishing was more than one-third higher than incomes earned either in the public or in the private sector, and 16% of the interviewees from the private sector did not think so. The other proposition—that the income from fishing was one-third less than the incomes in the other sector—was considered correct by 4% of the interviewees from the public sector, in comparison to the incomes from private-sector jobs, and 32% of the interviewees from the private sector considered the proposition to be true for the incomes from public-sector jobs.

Therefore, leaving aside the “No answers” and the “Do not know answers” and the “No difference answers”, fishers perceived their incomes from fishing to be higher than those in public-sector jobs.

When both the public and the private sectors are compared, both opinions—greater and lesser remuneration—are expressed, although the latter was more frequently stated for the fishery sector than for the private sector.

This difference of opinion, when the public sector and the other private sectors were compared, was coherent with the greater variety of professional and remunerative situations that the private sector as a whole presents, compared to the public sector.

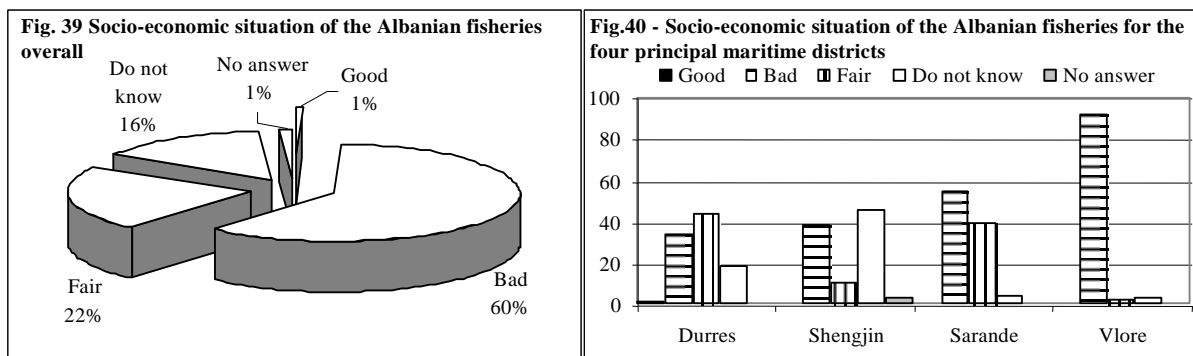
4.3 Maritime districts: characteristics and relations – current situation and future trends

The last part of the questionnaire covers the third field of interest in the research: the social environment of the maritime districts and their relations with other fishing entities. The

investigation attempted to establish the nature and content of the difficulties within and between the Albanian maritime districts and the fishing communities.

The interviewees' perception of the economic situation of their maritime district was rather negative: more than 60% of the interviewees were highly critical and another 22% considered them adequate. Some 16% were not able to make any evaluation of the issue¹¹(Figure 39).

Examining the responses to the question by maritime district (Figure 40), the most critical situation seems to be that of Vlore, for which a negative judgement was expressed almost unanimously by the interviewees. The remaining maritime districts also presented a critical picture, with the negative evaluations of the economic situation predominate, as in the maritime districts of Sarande and Shengjin, or for which "Do not know" responses were significant, as in the maritime districts of Shengjin and Durres. The latter port, nevertheless, was one of the four maritime districts on which there were some positive judgements, albeit only a few.



The major difficulties, on which the comprehensively negative judgement of local fishing economy depends, lie mainly in the sphere of sectoral policies, followed by the fishery resources and then marketing of the landings (Figure 41).

Regarding fishing policies, just under 20% of the interviewees gave a supportive answer; 82%) considered that the principal source of difficulty was the lack of public support for the sector, while 18% considered it to be the lack or inadequacy of regulation and controls.

Problems linked to the fishery resources themselves are of three types. Firstly, the most important is linked to the availability of resources (scarce or reduced) which lowers the quantity of landings and raises the cost of fishing. The second is linked to the poor quality of the available resources, which lowers the market prices. The third may be attributed to the unavailability of suitable fish stocks, qualitatively and quantitatively: the presently available stocks have been seriously damaged by abusive or illegal fishing practices.

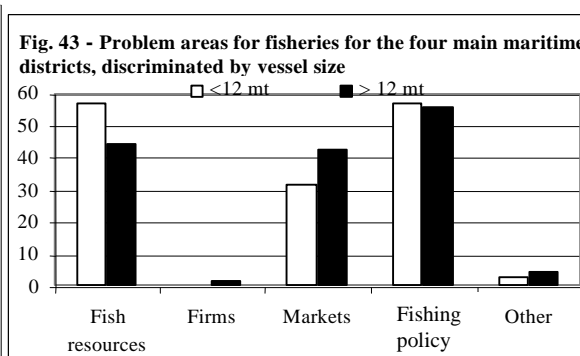
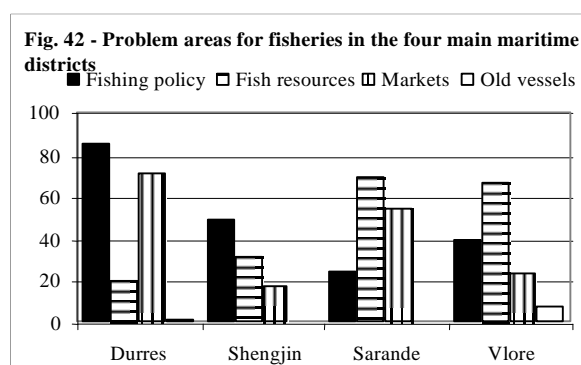
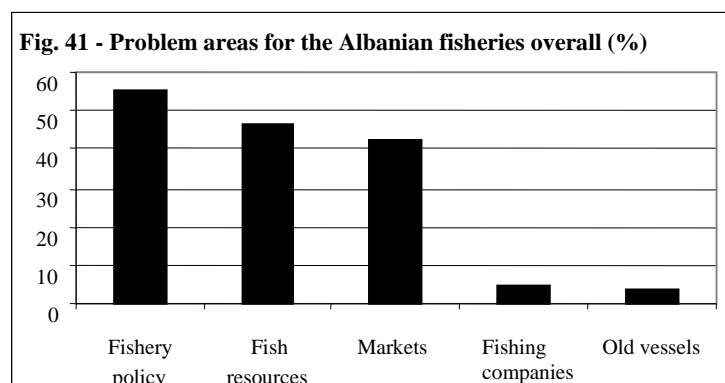
Regarding the market, several interviewees considered it a source of difficulties for the economic situation of the fishery sector, although there was a noticeable uncertainty in the reasons on which such an evaluation was based. Indeed, only in a few cases, which cannot be

¹¹ Sixty-six per cent of the small-scale fishers rated the overall socio-economic situation of the maritime districts as being good, compared to 61% of those working on large fishing vessels. The corresponding values for those interviewees who considered the situation to be only fair were 17% and 23%, respectively.

regarded as being significant, were arguments given explicitly with regard to the prices and to the competition from imports.

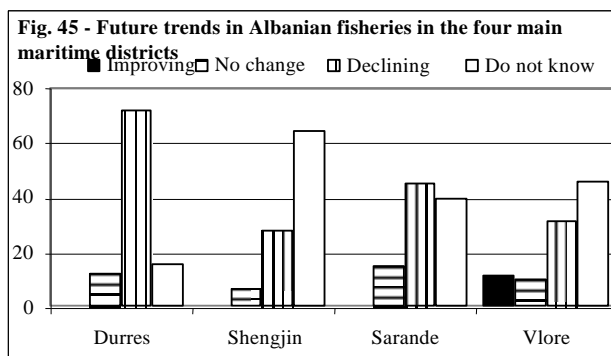
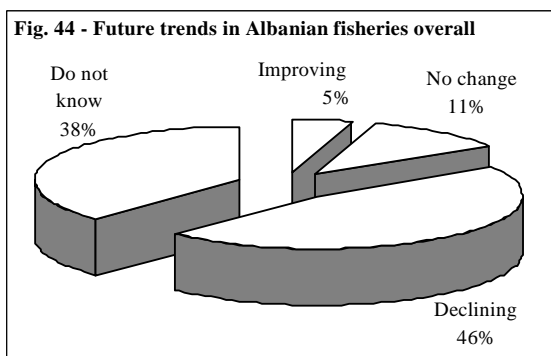
Relative to the information obtained for each problem-area for each maritime district, some peculiarities emerged (Figure 42): the problem of the availability of the resources was more strongly felt in the Sarande and Vlore maritime districts; in the policy sphere, the interviewees from the Durres and Shengjin maritime districts were less optimistic than those from the other districts; problems linked to the market were perceived mainly by the interviewees from the Durres and Sarande maritime districts; and the problem of vessel age was most strongly felt by the interviewees from Vlore.

Regarding vessel size (Figure 43), the differences perceived by the two groups of interviewees—those working aboard vessels less than 12 m in length, and those on vessels greater than 12 m in length—were, on one hand, the availability of resources, which was the most important consideration for the small-scale fishers, and, on the other hand, the greater relevance of the market problems for fishers working on the large vessels.



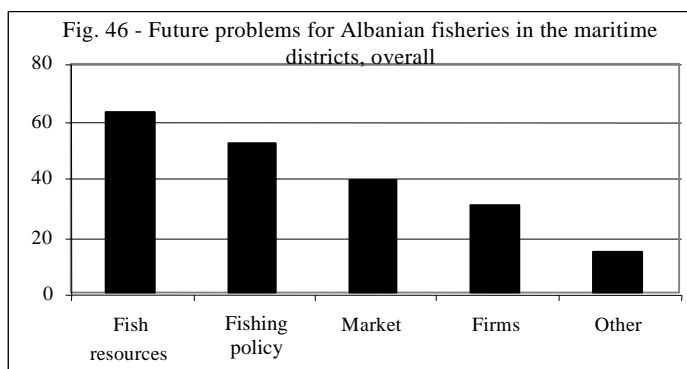
The future of the Albanian fisheries is presently affected negatively by the current perception of the sector's socio-economic situation. Indeed, 46% of the interviewees foresaw a continuing decline; only 5% considered recovery possible, and 11% evaluated the future situation as remaining stationary¹². Nevertheless, 38% of the interviewees did not know (Figure 44).

¹² The perception of future decline in the fishery sector was somewhat higher (51%) for the group of interviewees from the small-scale fishery, compared to those from the large-vessel fishery (45%). There were no significant differences between the two groups with respect to the other evaluations.



For the maritime districts the prospect of socio-economic recovery was only considered likely in the maritime district of Vlore, whereas the forecast of a decline in the sector was strongly supported by the interviewees from the Durres maritime district; in the two remaining maritime districts, the scenarios considered most likely were those of decline and of uncertainty in the direction of development of the fishery sector (Figure 45).

The answers to the question on the sector's future were weighted differently¹³ from those on the problems in the present situation (Figure 46).



In decreasing order of importance, the future problems of the Albanian marine fishery sector, in the view of the fishery workers interviewed were: the availability of fishery resources; governmental intervention in the sector; and the market, hence the policies adopted by the fishing companies.

Regarding the availability of the fishery resources and the fishing policies adopted, the motivations given by the interviewees were substantially similar to the those for the present situation. The problems in the market sphere arise firstly from the low prices for the landings, then from the lack of wholesale markets, and the dependence of the fishers on the wholesaler in the determination of the market prices. With regard to foreign exchange, the fishers complain of the competition from the imported fish products and the low prices available on the foreign markets; the market for sardines was considered to be particularly difficult.

¹³ It should be noted that, as for the present situation, the percentage of the answers on the future development of the sector were calculated with reference to the total number of interviewees for each maritime district. Moreover, while, for the maritime districts of Shengjin and Sarande there were no "no answers", in the remaining two maritime areas, particularly that of Durres, many interviewees did not give an answer to the question on the sector's future. On the other hand, it should be noted the question was of the multiple-answer type; for these reasons the total percentage was not equal to 100.

A significant difference between the perception of the present situation and the future relates to the major importance given to the behaviour of the fishing companies as source of future problems for the fishing sector. In particular, the problem was considered to arise from their violation of the fishing regulations, the resort to abusive fishing and, in general, the lack of criteria and rules in the conduct of fishing, which leads to excessive and hazardous fishing.

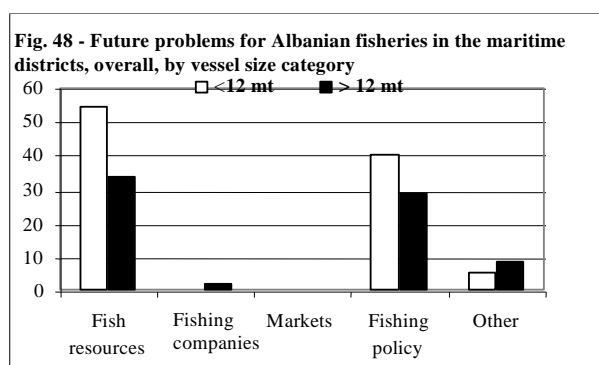
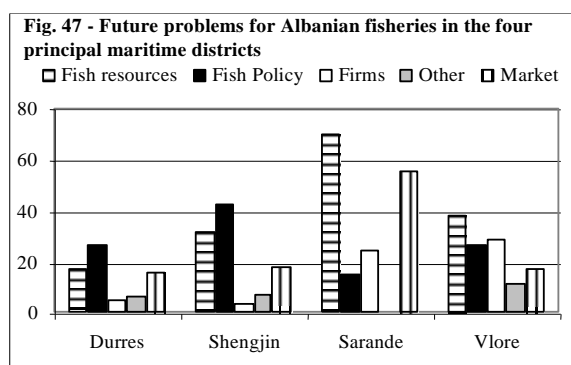
Finally, significant importance was given to the increasing cost of fuel and to the lack of and the cost of services for the maintenance of the vessels.

At the level of each maritime area (Figure 47), certain ports have specific problems and there are some problems common to all the ports in terms of the future of the fisheries. The fishers from the Shengjin maritime area identified two specific sources of future problems: the availability of the resources and the fishing policies. In the Sarande maritime district, the availability of the resources is the principal problem, which puts the recovery of the sector at risk; market problems were also considered significant.

Finally, the small-scale fishers were more sensitive to the future problems associated with the scarcity of resources (54% of the sample group compared to 34% of those working on large vessels), as was already seen from the responses to the previous question about the main current problems, To this must be added the greater perception of the problems linked to the sectoral politics.

For the interviewees from the Vlore maritime district, all the problem areas were considered important and were given quite similar weight with respect to the future of the fishery sector in the Vlore maritime district in order, they were: the availability of the resources; the fishing companies and policies; and, in the last position, the markets and services. The fishing companies' policies represents a problem mainly in the maritime areas of Vlore and Sarande.

Considering the difference in the answers according to vessel size (Figure 48), as previously noticed, fishers working on small vessels were concerned with future problems linked to the scarcity of the resources (54% of the sample, compared to 34% of those working on large vessels); also, they perceived fishing policy as a source of problems more than fishers aboard large vessels.

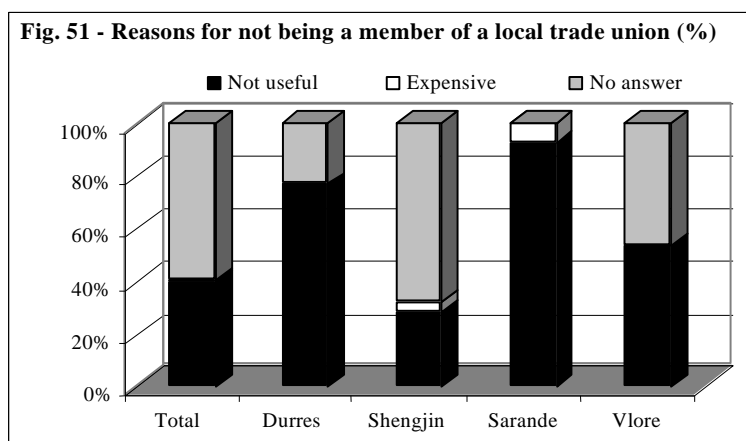
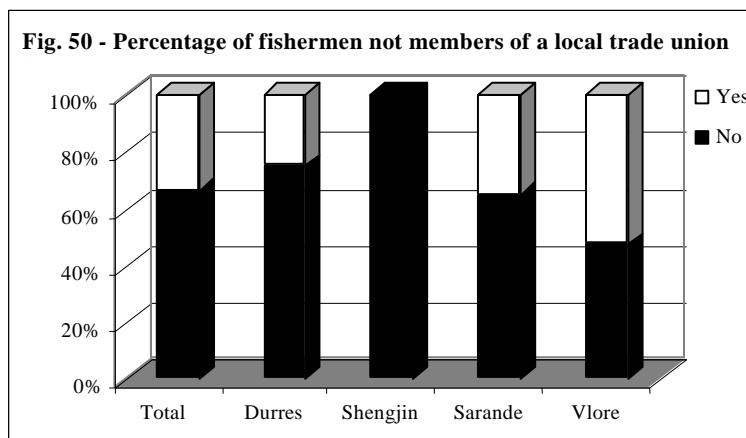


4.3.1 Labour trade union

When the social and economic situation of a productive sector is described, important aspects are the existence of bodies that represent and protect the interests of the fishers, the role of these bodies and the fishers' perception of their utility.

With regard to the existence of fisher's trade unions, less than 30% of the interviewees affirmed that there were no such associations in their own maritime district. In the Sarande district nearly 40% affirmed that they were members of a local trade union. In the remaining two maritime districts, dissimilar answers were given. In the Durres maritime district, about 30% of the interviewees declared that they were members of a local trade union. In the Vlore maritime district, about 56% said they were members of a local trade union.

Nevertheless, overall, about two thirds of the interviewees were not members of any local association (Figure 50)¹⁴.

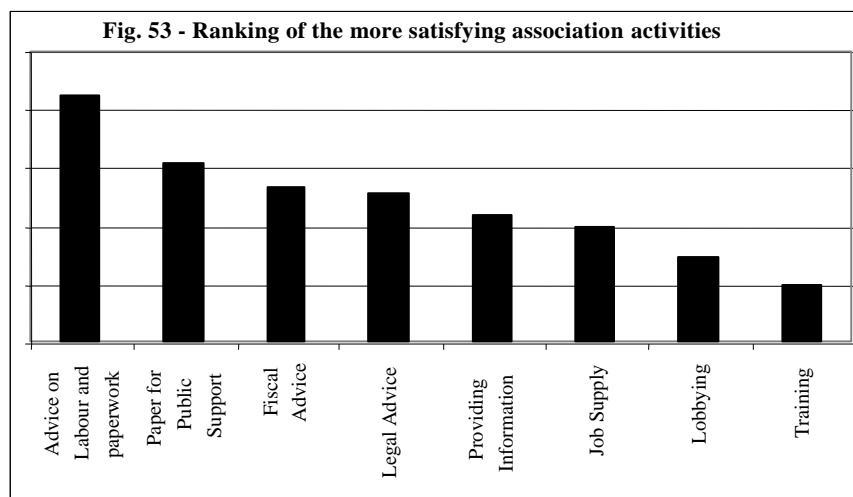
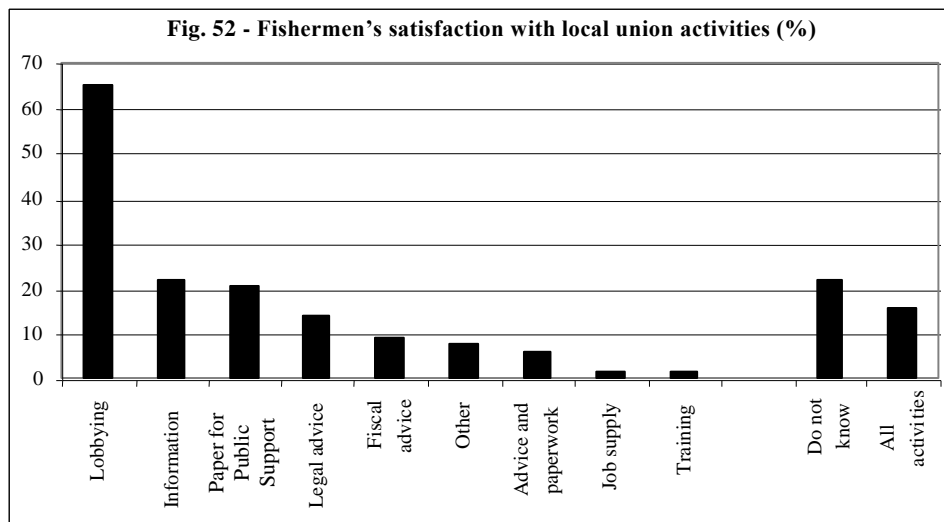


The percentage of those interviewees who did not give any reason for not being a member of a local trade union was high, both overall and for each maritime district.

¹⁴ In this context, it may be noted that the corresponding proportion was 80% for the small-vessel fishers and 63% for those working on large vessels.

Among the reasons given, the most obvious was that it was not useful to join such a union. On the other hand, even who are members of a local union indicated that their contact with the union was infrequent. Figure 52 shows which union activities satisfied them the most.

Among the union activities, lobbying was considered the most relevant; the provision and updating of information were considered to be much less relevant to the interviewees. In addition, more than 20% of the fishers did not know what the activities of their own trade union were, and another 16% declared that their own union was currently in a state of inactivity.



The ranking of the trade union activities by the interviewees is another important aspect (Figure 53).

Lobbying, although it was the most frequent response relative to preferences, is near the end of the rankings, probably because it is not translated into direct proof of services provided, hence a motive of satisfaction for the workers. The activities that result in the provision of

services such assistance in working practices, in the provision of public funding, in fiscal and legal consultancy, provision of information services and assistance in job seeking.

The difference between the activities perceived and those enjoyed, besides providing the basis for reflection on the need for assistance and care felt by the fishers, also indicates the direction in which the trade unions could move in order to fulfil more completely their role in supporting the fishers and as an interface with the public-sector and private-sector interlocutors.

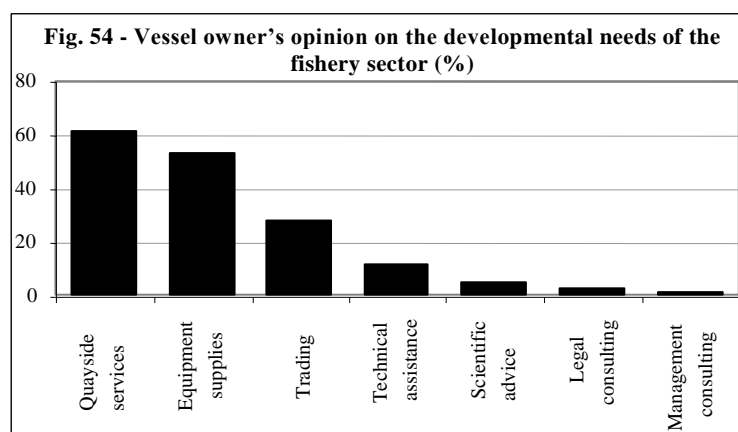
Given the low union participation, clubs and harbour authorities give fishers some opportunities of meeting each other to discuss common issues, to exchange personal experience and to occupy their spare time relaxing.

The local fishing community does not seem to develop any initiative to keep in touch with other such communities in the same area.

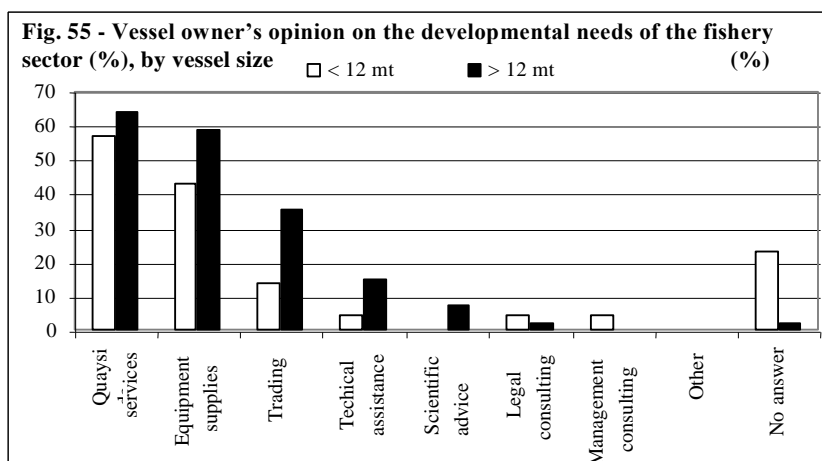
4.3.2 The maritime district: the lack of services

To deepen the analysis of the characteristics of maritime districts, the vessel owners were asked some specific questions, aimed at identifying the strategic services that are lacking and those provided by the local maritime district.

In order to develop the fishing, and besides the fishing companies' equipment and other resources – above all the capital and human resources – the owners indicated the need for other services and equipment (Figure 54). The most important were services closely linked to fishing, notably the availability of quayside services and the provision of the necessary fishing equipment.



Overall, the greatest importance given to the two above-mentioned services is not surprising; nor is the low frequency of the answers given for the other kinds of services, notably those related to the commercialization of fish products and, even more so, to technical assistance and scientific advice, as well as the very little weight the owners gave to the availability of business consultancy services, of the legal-administrative and the managerial types.



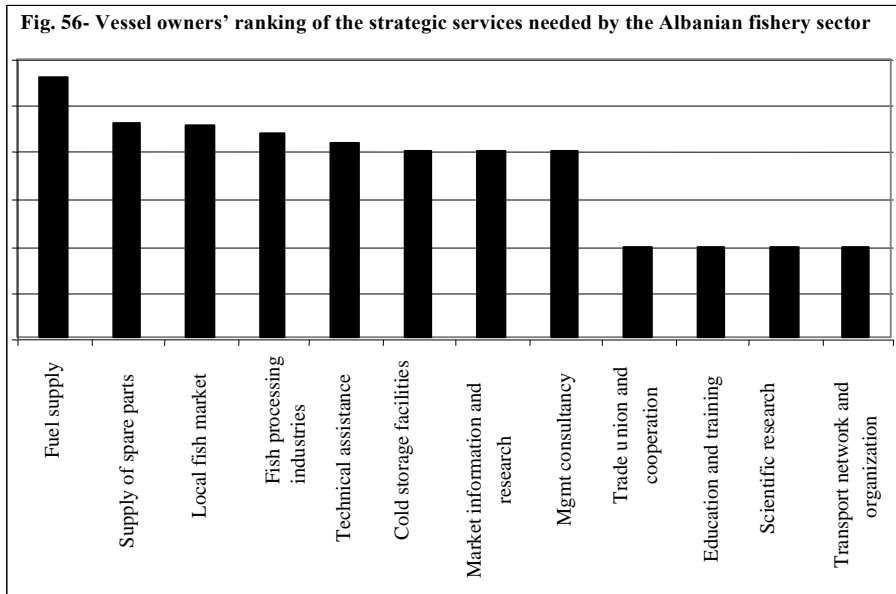
The need felt for services was higher among owners of large vessels (>12 m) than among those of small vessels (<12 m). The latter were more reticent in giving the answers and seemed to feel more the need for traditional legal and company management consultancy services (Figure 55).

As regards the strategic services considered to be needed for the functioning of the fishing companies, the answers given by the owners focussed on four aspects (Table 13).

The first aspect was fuel supply which, as it has emerged before in other answers to the questionnaire, represented an issue of particular importance for the owners at the time of the survey. The second aspect judged to be strategic was the presence of a local fish market, the supply of spare parts and technical assistance services. The percentage frequencies of the answers are given in Table 11 and the ranking of the needed services is given in Figure 56.

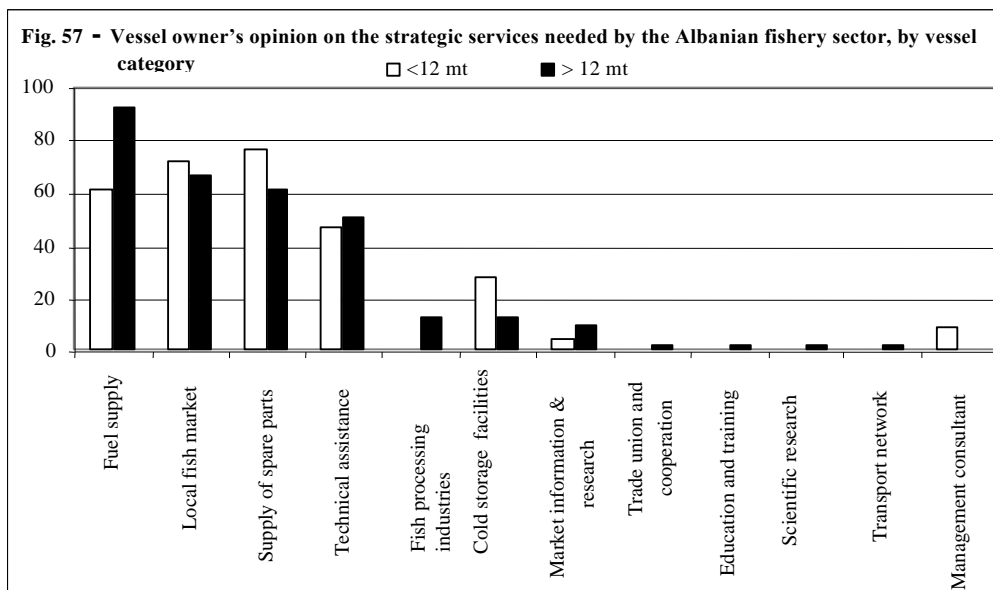
Table 13 - Strategic services

<i>Services</i>	<i>%</i>
Fuel supply	76.6
Local fish market	64.1
Supply of spare parts	62.5
Technical assistance and vessel services	46.9
Cold-storage facilities	17.2
Market information and research	7.8
Fish-processing industries	7.8
Management consultancy	3.1
Trade union and cooperation	1.6
Education and training	1.6
Scientific research	1.6
Transport network and organization	1.6



The data given in Figure 56 seem less concentrated on a few services considered as being strategic in comparison to the distribution of the frequencies. The order of importance given to each service is only in part different from the one deriving from the distribution of the frequencies: the most important aspects are still the availability of fuel, vessel spare parts and fishing equipment, and the presence of a fish market. At the lower end of the frequency distribution in Table 13 and in ranking in Figure 56 are the presence of an effective transport network, the scientific and biological research, the personnel training, and the possibility of cooperation and association.

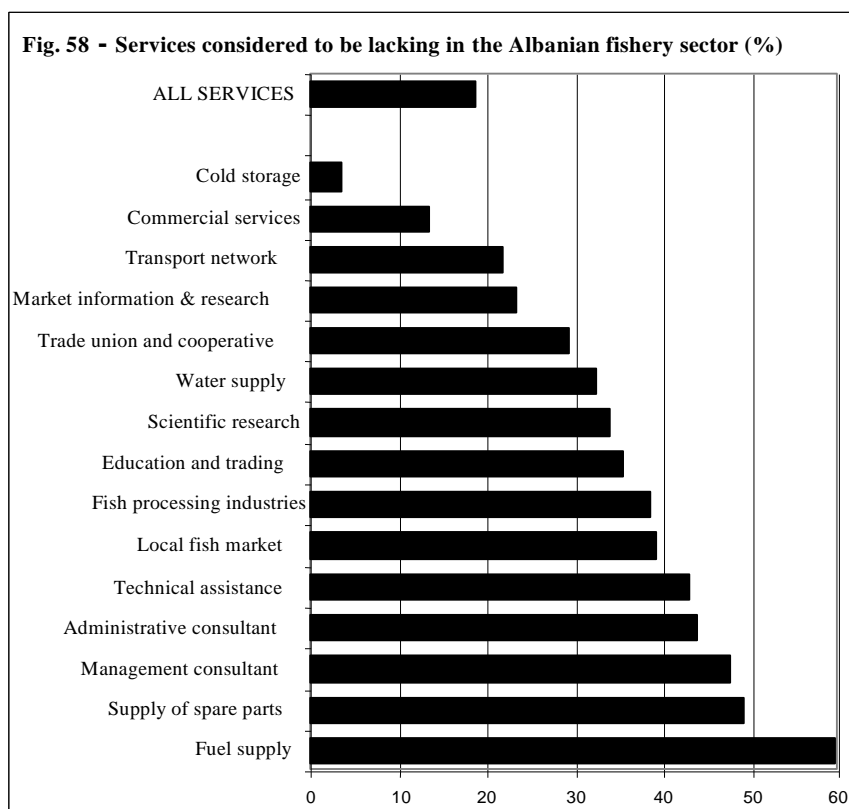
Figure 57 shows the answers according to vessel size.



The frequency of responses from the two groups of owners was significantly different for some services, although the ranking of the important services was not significantly changed¹⁵. Over 90% of large-vessel owners considered the fuel-supply problem to be the most important, whereas only 60% of the small-vessel owners did so. By contrast, the latter considered the supply of spare parts and of cold storage space for the conservation of the fish product more important than did the large-vessel owners.

The responses on this group of questions provide a negative evaluation on the state of the maritime districts investigated: instead of *strategic* services—undoubtedly important for the long-term development of the sector—the immediate problem is with *primary* essential services which are urgently needed by the fishery sector.

With regard to the services considered *strategic*, their lack has an adverse impact on the fishing, according to the interviewees (Figure 58). In spite of the wide range of services proposed to the interviewees—services to the fishing company, vessel-support services, services for product handling—20% of the interviewees, belonging above all to the Vlore maritime district, stated that they worked in a situation of total lack of such services. In the evaluation of those who indicated specific lacks, the answers given were often selected from a multiple-choice list¹⁶ proposed in the interview.

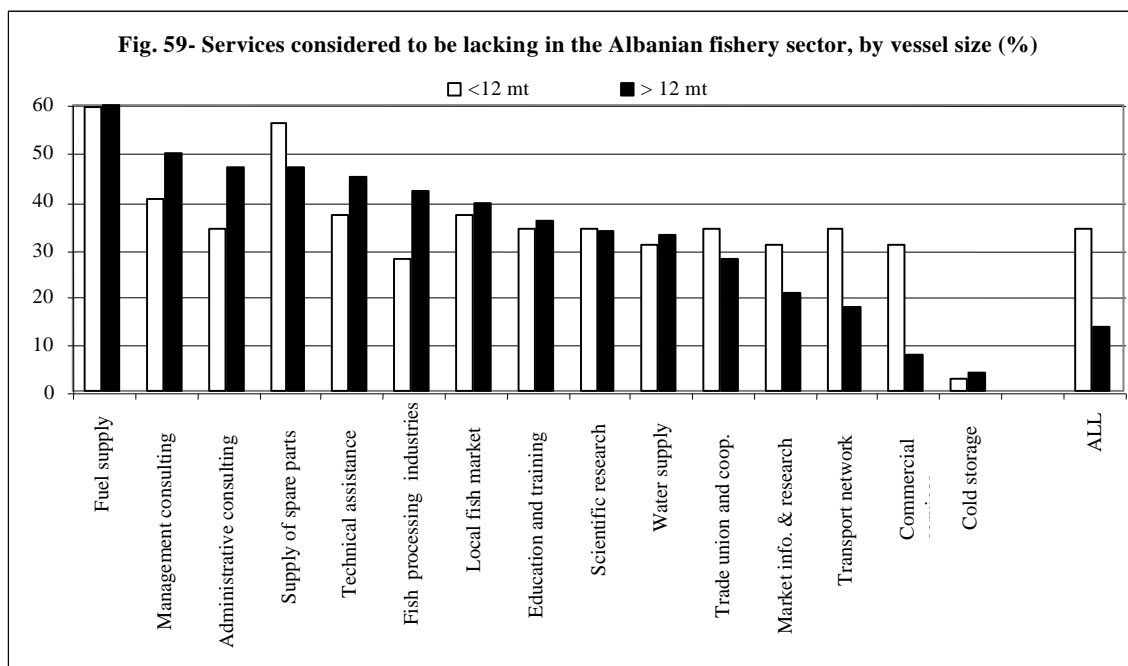


¹⁵ The ranking of the first three strategic factors by the large-vessel owners is in inverse order to that of the small-vessel owners; but this does not alter the perception of their importance by both groups of owners.

¹⁶ Less than 20% of the interviewees—above all those from the Sarande maritime district—who answered the question selected more than 10 services they considered to be lacking, from among those proposed; and another 20% selected between 5 and 10 such services they considered lacking; 30% of the interviewees—the majority from the Vlore maritime district—did not answer the question.

For some services, the answers objectively reflect a real lack, but for some there appeared to be a subjective judgment about services felt to be more or less insufficiently available in the corresponding maritime district. As seen previously, the principal problems concern the fuel supply and the availability of the spare parts for the fishing equipment, which, objectively, make fishing difficult. The lack of management consultancy services and assistance from the public administration is increasingly felt in the maritime districts. On the other hand, the lack of services for the conservation of the fish product or for its commercialization were considered to be of minor importance by the owners, rather than a reflection of the actual presence of services in the fishing areas.

The lack of some services was more strongly felt by the small-vessel owners than by the large-vessel owners (Figure 59). The problem of fuel availability was the most critical issue for both groups. The two groups also had a similar perception of the lack of services related to the education and training of the human resources, to the scientific research, to water supply, cold storage for the fish. The services most lacking, in the view of the small-vessel owners, compared to the other group, were linked to distribution and marketing of the product (i.e. services commercialization, market research and information, transport network) and to the supply of spare parts for vessel maintenance.



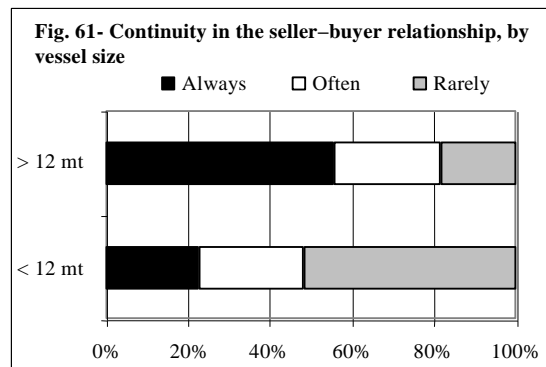
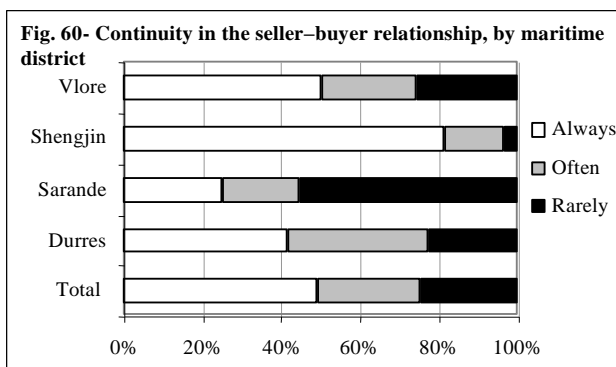
The services most lacking, in the view of the interviewees from large vessels, compared to those from small vessels, were linked to the services of management consultancy and to the lack of fish-processing industries.

To face the present lack of certain services in their own maritime districts, the fishers turn to other maritime districts in Albania (mainly Durres, 72% of the answers) or in Greece (16%) and in Italy (3%).

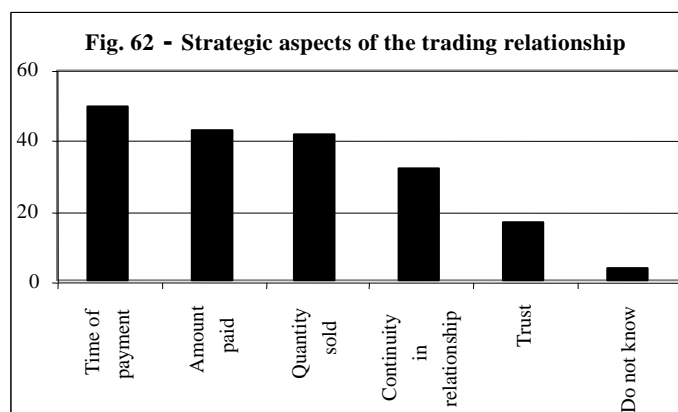
4.3.3 Trade and markets

The relationship between the fishing companies and the market is very stable (Figure 60): less than one quarter of the interviewees stated that they sell their fish product very *rarely* to the same buyer; 50% sell their fish *always* to the same buyer, and the remaining 26% *often* sell to the same buyer.

The stability in the seller–buyer relationship seems to be above all true for the large-vessel fishers rather than the small-vessel fishers: 55% of the interviewees from large vessels stated that they sell their fish always to the same purchaser, whereas only 23% of those from small vessels did so.



Although continuity in the seller–buyer relationship was not considered to be the principal aspect of trading relations, it was nevertheless given a significant weight (Figure 62). Strengthening the continuity in the seller–buyer relationship is the basis of the seller’s confidence in the buyer.



The most important aspect, however, was the timing of payment; this was followed by the amount of payment and the quantity sold. Table 14 shows the percentage frequency of the answers referred to a single option (in bold along the diagonal)¹⁷ and to all the possible pairs of aspects considered important (in the remaining cells). Among the interviewees who selected only one option, the sales volume and the continuity of the seller–buyer relationship

¹⁷ The question foresaw the possibility of indicating as far as possible the two aspects considered important, based on the trading relationship.

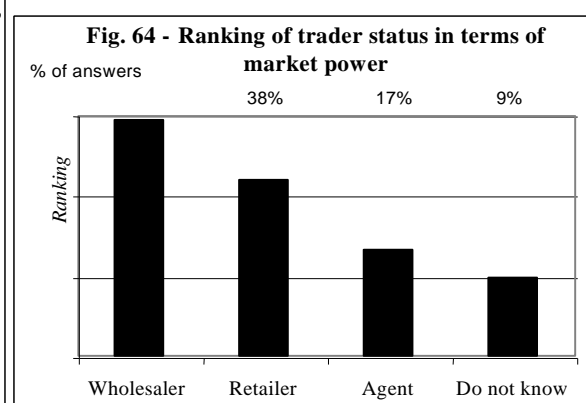
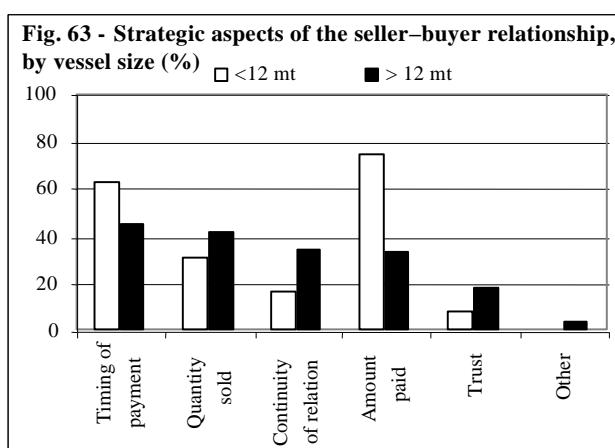
were the only ones with a determinant role in the relationship, followed by the price level and the confidence in the buyer.

Table 14 - Strategic aspects considered important in the trading relationship

	Trust	Time of payment	Quantity sold	Continuity	Amount
Trust	8.3				
Time of payment	5.7	0			
Quantity sold	1.3	19.5	25.0		
Continuity	7.5	11.3	7.5	25.0	
Amount	3.8	20.8	15.7	6.9	12.5

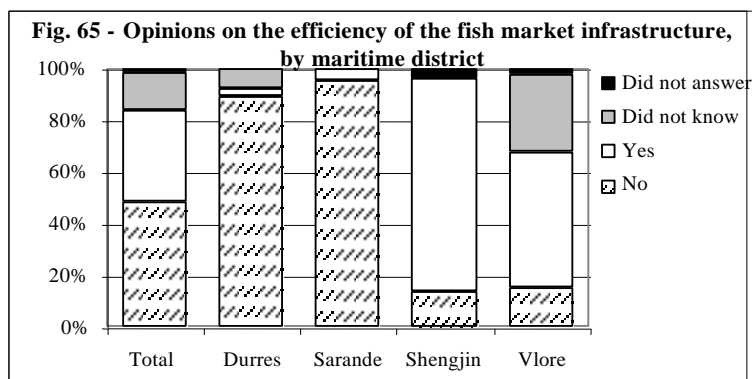
Comparing the percentage on the diagonal, for each strategic aspect, with the percentages relative to the other options with which each aspect is linked, it becomes clear that the continuity of the seller–buyer relationship and the confidence in the relationship are the only elements that some of the interviewees considered to be crucial in this context (the percentage in the diagonal exceeds those in the remaining cells of the column); the volumes bought and sold and the amount of payment are also important aspects alone as well as jointly with others (mainly between themselves and with the timing of payment). The timing of payment was not, on its own, considered an important element in the transactions, but represented an important aspect if associated with the selling price or to the volume sold.

Among the aspects considered strategic in trade relations (Figure 24), the operatives of the small fishery are more sensible to the modalities of payment, both in the amount as well as in the time of payment; in contrast, the operatives of the big vessel give a major importance to other elements of exchange, among which the stability of the relation, the confidence bases and the volumes exchanged.



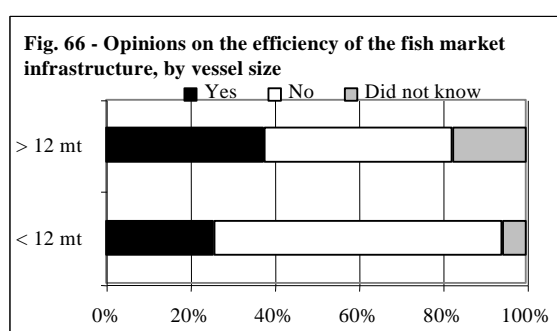
Still referring to the trading relationship, it was sought to determine the contractual position of the fishers relative to the different categories of buyer. The fishers felt they had the least contractual power vis-à-vis the wholesalers; this was true both in terms of the frequency of the answers (82%) and in terms of ranking (Figure 64).

The interviewees' opinion of the efficiency of the local fish-marketing infrastructures was, on the whole, not very good (Figure 65). Around 50% of the sample gives a negative evaluation, while the 35% consider the official market to be effective.



The situation appears to differ considerably among the four maritime districts: in the Durres and Sarande maritime districts, 90% of the fisher's interviewed expressed a negative opinion on the efficiency of the local markets; in the Shengjin and Vlore districts, on the other hand, a positive opinion emerged on the efficiency of the local markets (82% and 52% of the sample, respectively). However, in the Vlore maritime district, more than 30% of the fishers did not give an answer on the fish-marketing infrastructure.

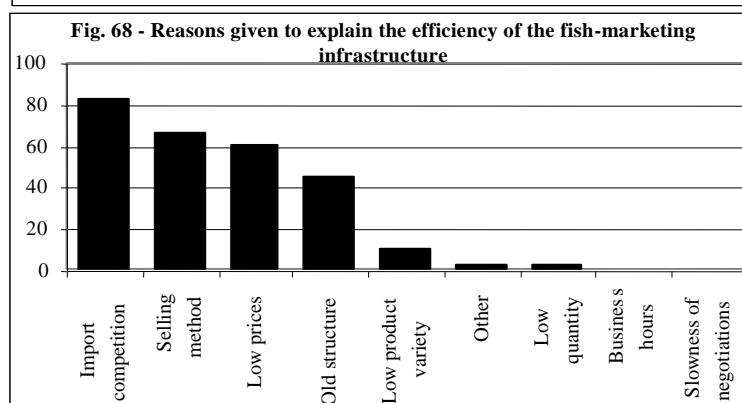
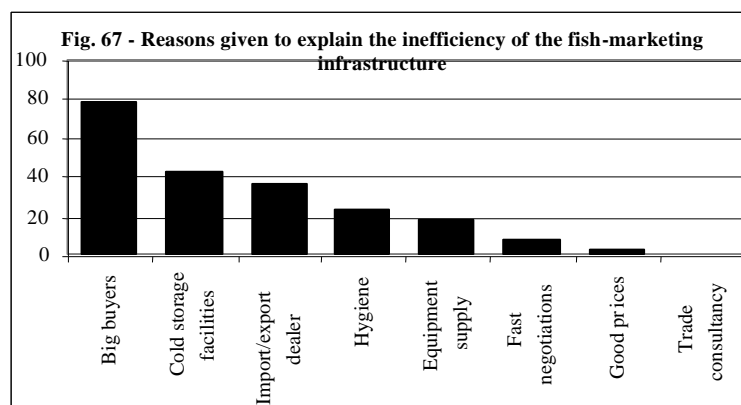
The interviewees from small vessels were more severe than those from large vessels: 69% of the former had a negative opinion of the efficiency of the local fish-marketing infrastructure, compared to 44% for the latter (Figure 66). Besides this, the group of the uncertain operatives is more considerable in the segment of the big fishery (6%) in comparison to the complimentary segment (17%).



Both these aspects have to be considered in the context of the degree of utilization of the local fish-marketing infrastructure for selling of the fish product; this degree was higher for the small-vessel fishers than for the large-vessel fishers, and this also depended on the kind of market: for the producer, for the consumer or for both. The commercial channels leading to local retail tend to be important for the small-scale fishers segment; these comprise distribution to restaurants or to consumers, whereas the presence of small-scale fishers in the wholesale markets is limited, especially if such markets are dedicated to import-export.

The main reasons supporting the positive opinion of market efficiency were given by the interviewees who participate in the market transactions. The reasons were: first of all, the presence of big purchasers and then of brokers and import–export traders; and, in terms of the presence of the services in the marketing infrastructure, mainly cold-storage facilities (Figure 67)¹⁸.

Those who expressed a negative opinion (inefficiency of the local fish-marketing infrastructure) indicated as the principal problems the competition from imported fish products, the modalities of sale, the low price levels, and the obsolescence of the market infrastructure (Figure 68).

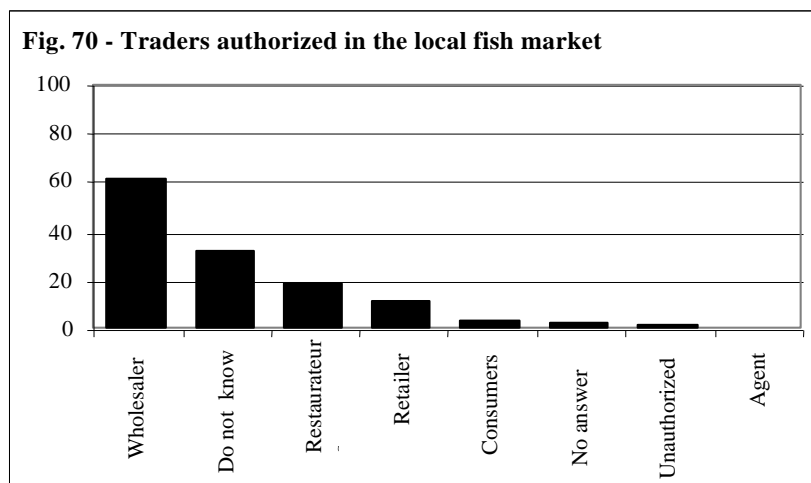
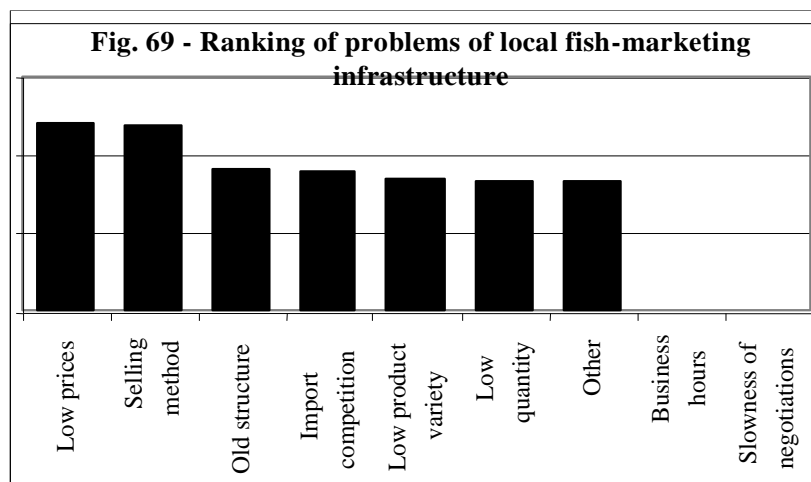


Regarding competition from foreign fish products, it should be remembered that the export flow tends favour products that are of high commercial value and for which the Albanian fishers complain that their remuneration is not adequate. On the other hand, imports bring low-value and low-priced products to the internal market; in this case, the local products suffer from competition both in terms of quality and price, owing to the difficulties in differentiating between the imported and the local products.

¹⁸ In particular, comparing the replies given according to the segment of the fishery sector, the large-vessel operators considered relevant the presence of cold-storage facilities and the availability of equipment, whereas the small-scale fishers made a positive judgment of market efficiency where there were commercial intermediaries for foreign markets and for determining price levels.

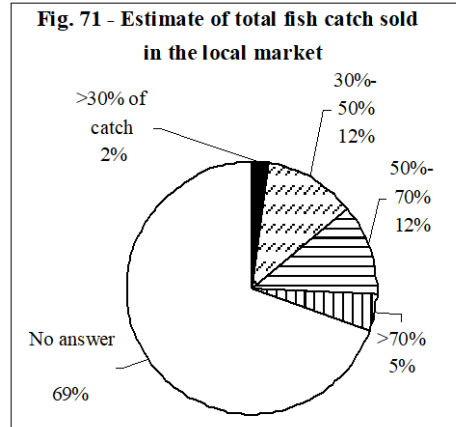
The most serious problems in the ranking were the price levels of prices and the selling modalities; they may be a strongly interrelated (Figure 69). These were followed by the problems of old infrastructure, the competition from imported fish, the low variety and the low quantity of the fish products on offer, and finally a number of other less specific problems perceived by the interviewees.

With regard to the types of traders authorized to operate in the fish market structures, the wholesaler is predominant (according to more than 60% of the interviewees); the other operators (restaurateurs, retailers, consumers) were considered to be of marginal importance (Figure 70).



One-third of the interviewees gave no answer on the types of operator in the local fish market.

Figure 71 shows the interviewees' estimate of the total fish catch that is sold in the local fish market.



The high percentage (69%) of “No answer” responses, did not, *a priori*, allow a reliable evaluation; several hypotheses are possible (e.g. an expression of a total ignorance on the subject, or a difficulty to estimate the quantity of local fish sold in the market, or some other reluctance on the question).

Only 5% of the interviewees considered that more than 70% of the local catch was sold in the local fish market; 12% considered that the quantity was between 50% and 70%; and another 12% considered that it was between 30% and 50%; and only 2% thought it was less than 30%.

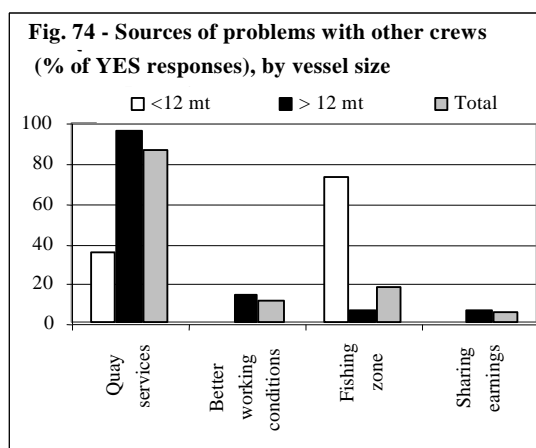
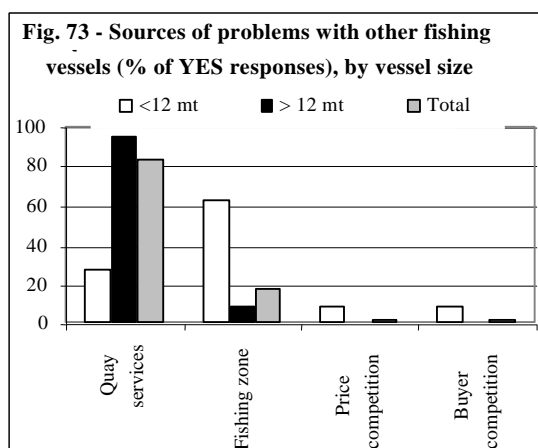
The effect of a low percentage of the local fish product sold in the local market on the perceived inefficiency of the fish-market infrastructure, indicated above, probably creates a vicious circle between the two factors (volume sold and market efficiency).

The perceived low relevance of the official market was also to be seen in the responses to the question on the sources of information the interviewees considered useful in order to know the trends in the main economic sector variables (Figure 72).

From this line of inquiry, the importance of the wholesalers again emerges, inasmuch as they are a source of information to the local fishery operators; this is also another sign of the contractual power that such negotiators have in controlling the information on the principal market variables, among which, the most important is the price level. There did not seem to be a marked presence of foreign in the Albanian fish markets: only 25% of the interviewees answered affirmatively, compared to 43% who gave a negative answer to this question; the remaining 32% did not give any answer. The majority of traders came from the Albanian maritime districts of Durres and Vlore; they were mainly wholesalers attracted by the variety and quantity of the local fish product.

The relations with other crews and vessels did not seem to constitute a significant source of problems (Figures 73 and 74): referring to both aspects, only around 35% of the interviewees state that the relations with other workers and vessels feed certain problems¹⁹.

¹⁹ There was a low spread in the answers when vessel size was taken into account: 31% of the small-scale fishers and 37% of those from large vessels stated that relations with other crews and other vessels were problematical.



The fishing itself does not seem to create problems among the vessels in the Albanian fisheries; 60% of the interviewees supported this view. The problematic situations that emerged most often related almost exclusively to the use of the quay services (84% of the positive answers) and to the fishing areas (18% of the answers); these situations were linked to competition in the access to the fishing resources and to the fishing company services. Competition linked to the market place were not considered important, either in the form of price competition or of competition among the buyers.

Similar considerations could be applied to the matter of problems with other crews, maybe because interviewees did not distinguish the two aspects—vessels and crews—that the question was intended to reveal. Some 65% of the interviewees did not indicate the existence of problematic situations in the relationship with other crews; where such situations existed, the two principal motivations were similar to those mentioned previously: quayside services and fishing areas.

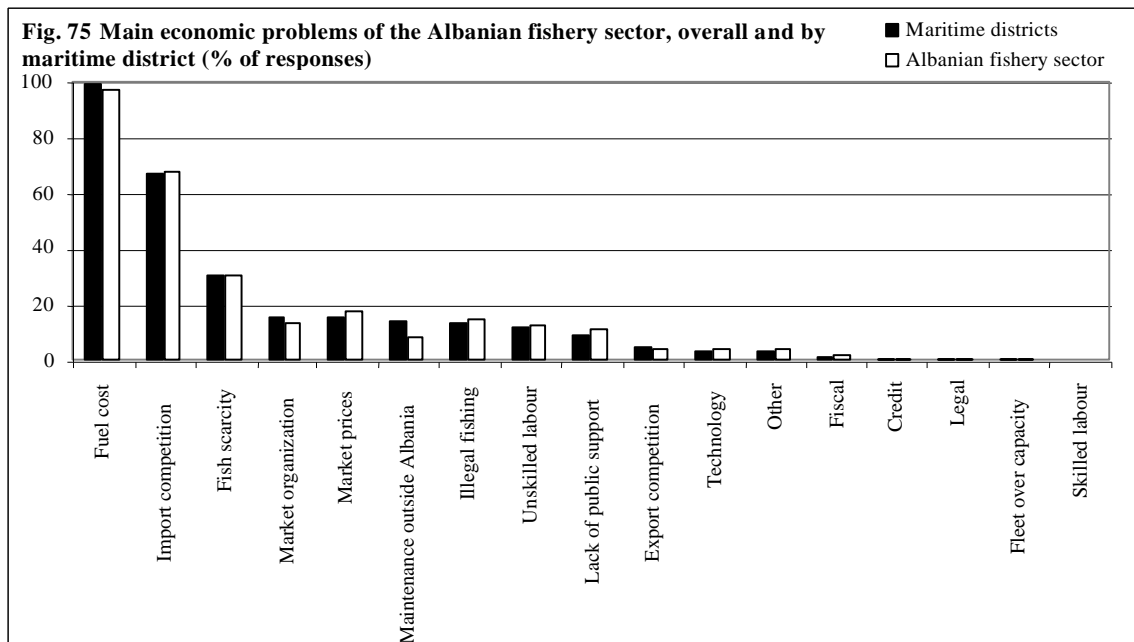
Two other aspects were considered to be of marginal importance, 12% of the interviewees indicated the working conditions (12%), and 6% indicated the method of sharing the earnings from the fishing.

The problem of access to quayside services was considered important in the relations between the crews as well as between the vessels, but it had a much higher importance for the fishers aboard large vessels than for those from small vessel fishery; for the latter, the principal issue was the access to fishing areas. Regarding the problems between the vessels, the competition for prices and buyers was identified only by fishers from the small vessels, but nevertheless it remained a problem of moderate relevance.

With regard to the relations with other crews, only fishers from large vessels indicated two further problems, even if of minor importance: one was the competition on working conditions and the other, about the modalities of sharing the earnings among the crew members according to their positions in the crew.

4.3.4 Problems and opportunities, strengths and weaknesses

The perception of the fishery problems was the object of some questions put to the Albanian fishers in order to identify the principal economic problems, the strengths and weaknesses of the sector overall, and each maritime district (Figure 36).



At first sight it seemed that the fishers were not able to distinguish the national level from the local one: the specification of the principal economic problems of the fishery sector by maritime district led to a distribution of frequencies almost identical to that of Albanian fishery sector as a whole.

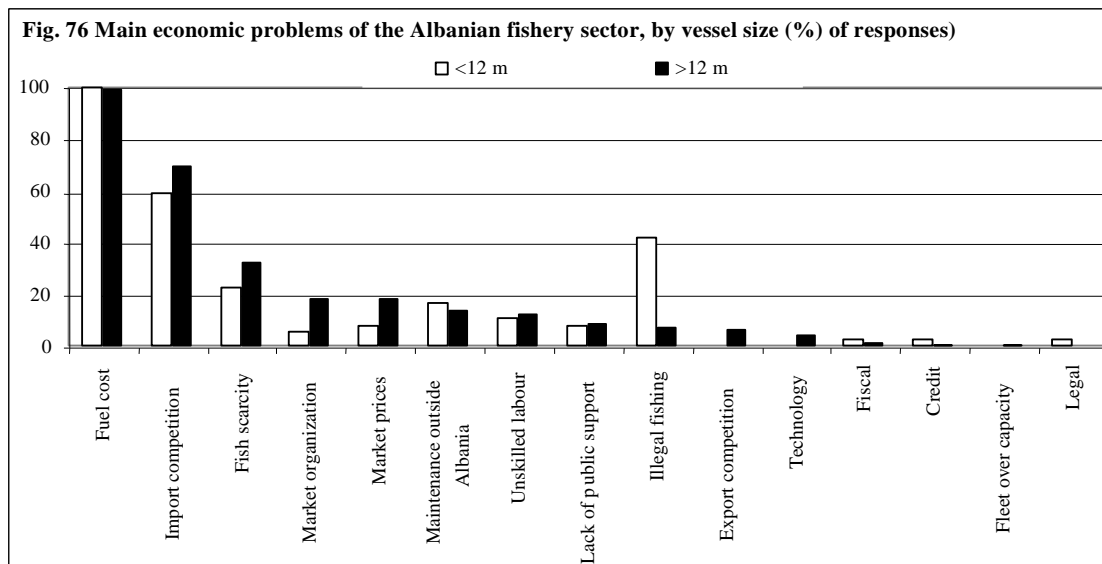
Although the close similarity of the results may not imply an identity of situations, it may be that the fishers considered that the local problems had to be addressed at the national level from the local one, without a view of the entire sector being necessary.

There was a general consensus on a few specific problems. The main one, indicated by almost all the interviewees, was the high cost of fuel, which has a negative impact on the income of the fishing companies, as has already been discussed. The second economic problem was with the markets: one-third of the interviewees indicated the competition from imported products being sold on the local market. Following these two main problems, only 31% of the interviewees mentioned the scarcity of fish resources; and the frequency of responses to the remaining questions was much lower still²⁰.

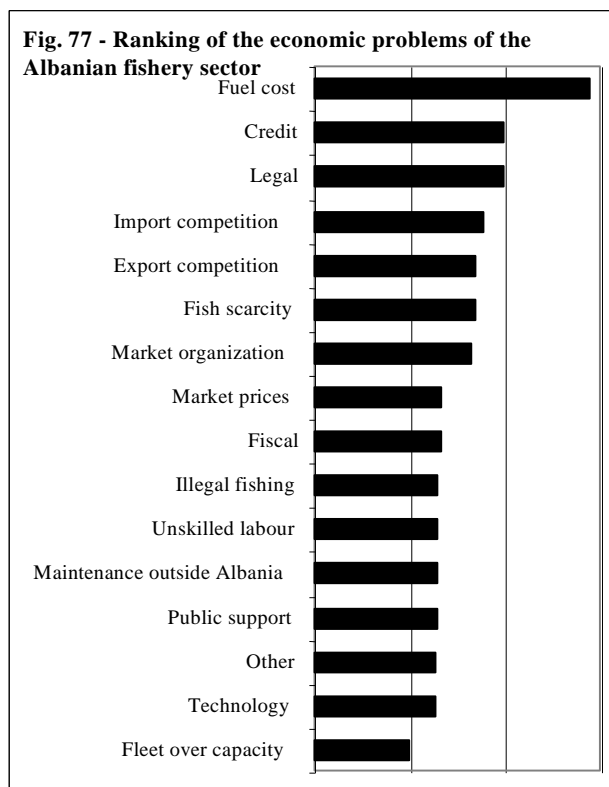
²⁰ The “Other” category of responses (Figure 75) includes the lack of a fish-processing industry and of vessel-maintenance facilities in Albania, and the shortage of spare parts.

Figure 76 distinguishes the answers by vessel size (<12 m and >12 m), so as to reveal the specific problems of each group from the problems common to both.

The problem of fuel cost was of the greatest importance to both groups. Other problems felt with the same seriousness by both groups included the difficulties of vessel maintenance outside Albania,, the lack of a specifically skilled labour force, the lack of public support, and problems of a financial and fiscal nature.



Regarding the specific problems of each group, the small-scale fishers were particularly concerned by the problem of illegal fishing.

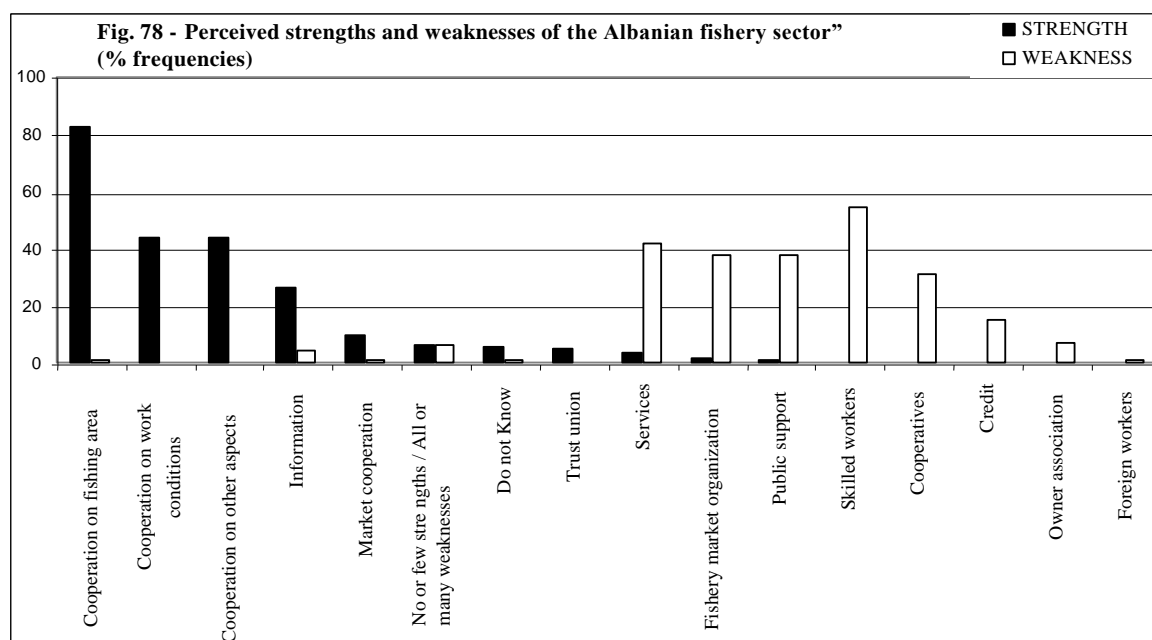


Market problems were more strongly by the fishers from the large-vessel group than by those from the small-vessel group, though the difference between the two groups was not great: the main problems concerned the competition from the sale of imported fish products on the local markets and of the Albanian fish products on the foreign markets, the market prices and the organization of the market. Another problem more strongly felt by the large-vessel group was the scarcity of fish resources.

The ranking of the above-mentioned problems according to their perceived degree of seriousness presented a somewhat different picture from that given by the frequency-distribution of the answers (Figure 77).

The high cost of fuel was ranked first in terms of perceived seriousness, followed by those concerning legal assistance and availability of credit; then came the difficulties arising from the relative competitiveness of imported fish products on the Albanian market and of the Albanian exports on foreign markets.

The identification of the strengths and weaknesses of the maritime districts leads to a clear distinction between the two situations (Figure 78).



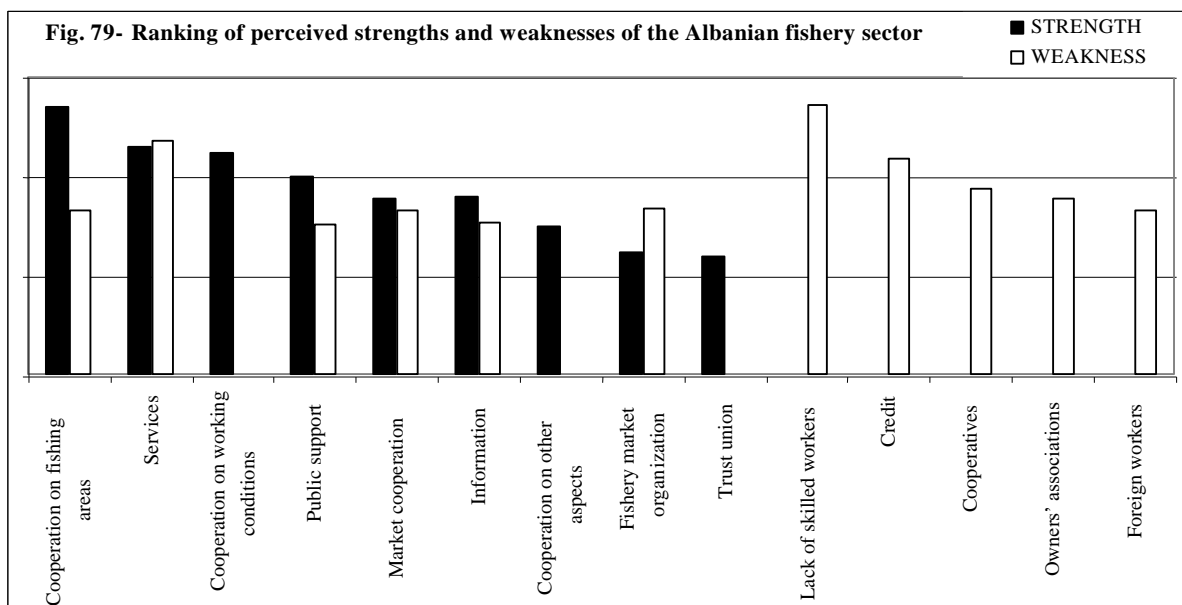
The strengths tended to be “immaterial” elements in the local fishing communities, whereas the weaknesses were mainly in the lack of services and of infrastructure in support of the fishers and the market.

The strengths were also indicated by a cooperative attitude among the fishers who were concerned by a greater range of topics: first, as regards the fishing areas, hence the working conditions and, in general, other aspects in which other local fishery operatives are involved.. Even the availability of information was indicated as a strength of the maritime district.

As far as the fishing areas were concerned, as has already been indicated, small-scale fishers saw competition with the large vessels for fishing areas as a problem in their relations with other vessels. This result is in contrast with the idea of cooperation among the fishers as one of the main strengths of the Albanian fisheries. In the absence of further information on this matter, there are two possible explanations: the interviewees did not fully comprehend the sense of the term “cooperation in fishing areas”; although this would appear to be too widespread an error, there is no real contradiction in the answers to the two questions, since cooperation in the fishing areas could correctly be considered as a strength of the fishing communities in the face of a problem concerning competition in the access to resources.

The principal factor of the weakness was considered to be the lack of a specialized labour force, followed by the lack of services, the insufficient/inappropriate organization of the market infrastructure and the lack of public support. Finally, in spite of the frequent perception of cooperation among the fishers as a strength in the fishery sector, cooperation was also indicated as a weakness²¹.

The interviewees were also invited to rank the above-mentioned factors in decreasing order of importance (Figure 79).



As in the preceding analyses, the attribution of a degree of importance to a given factor allowed, on one hand, confirmation of its importance on the basis of the frequencies of answers, as well as validation of the choices made; on the other hand, the ranking of factors in terms of perceived seriousness may indicate those factors that, even though chosen more frequently, were not felt to be particularly important.

²¹ The idea that the cooperation among the fishers is a weakness may be attributed mainly to the dissatisfaction of the vessel owners' organizations with such cooperation.

The analysis of the ranking requests indicated two situations: one was where the factors were qualified either strengths or as weaknesses, on which only a single opinion was expressed—a strength or a weakness - whereas there were other relevant factors considered both as a strengths (by some interviewees) and as a weaknesses (by other interviewees).

Regarding the aspects only considered as strengths, cooperation on working conditions was one of the most important; of the aspects only considered as weaknesses, the lack of skilled labour, the availability of credit, in particular, and the presence of fishers' cooperatives and the existence of owners' organizations were the most important.

In the second type of situation considered, the cooperation among the fishers with respect to the fishing areas, the availability of services and public administration support were the felt to be the most important aspects. Cooperation on fishing areas was considered to be a strength by the members of the fishing community, but it was also considered to be an aspect of particular importance both by those who consider the marine environment as a strength of the fishery sector and by those who judged it as a weakness. Regarding the availability of services, the result based on the frequency of responses, was seen more as a weakness than a strength. Nevertheless, all the interviewees attributed a high importance to this particular aspect, whether they considered as a weakness or a strength²². The evaluation of the support afforded by public administration policy gave similar results.

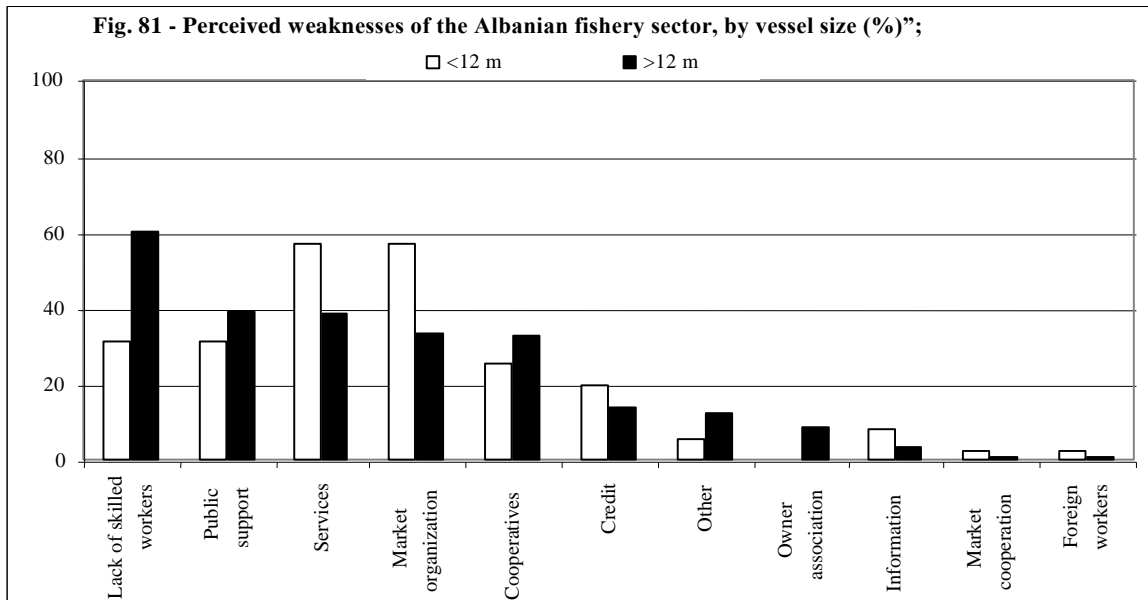
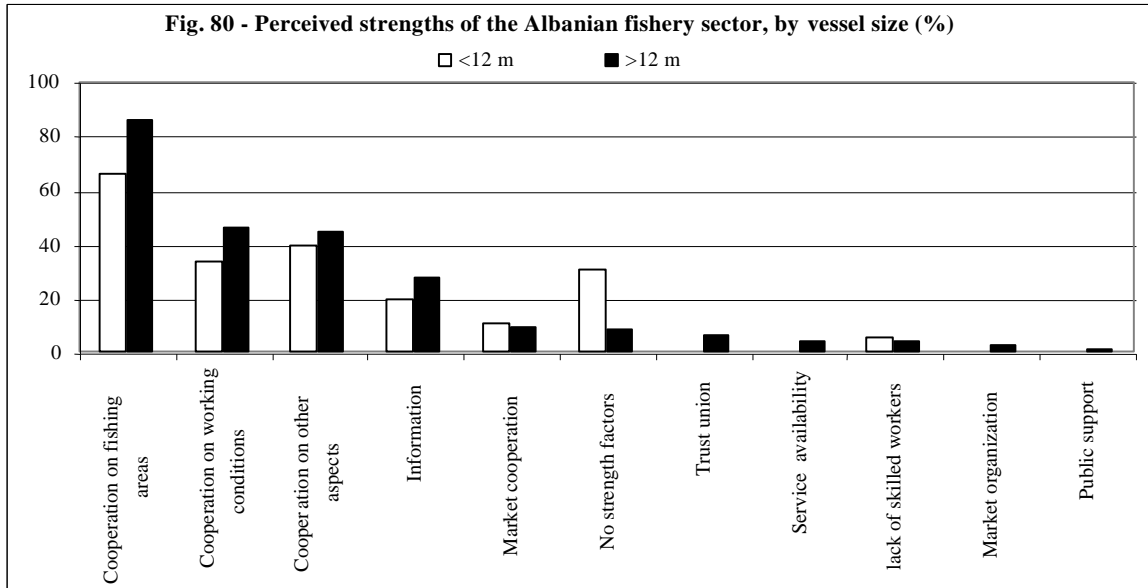
When the results (of the questions on strengths and weaknesses) were discriminated by vessel size, they showed similarities and differences in both groups of interviewees (Figures 80 and 82).

In describing the fishery sector's inadequacy in terms of strengths, the opinion of the small-scale fishers was more severe than that expressed by the fishers from large vessels.

Such severity was manifested with respect to other strengths about which the small-scale fishers were more careful than those from the large vessels. This was true for all the cooperative aspects – among the fishers on fishing areas, on working conditions etc.

With respect to the weaknesses, the small fishers complained, more than the others, about the problem of the availability of services, the organization of the market and the availability of credit. The fishers from large vessels were more concerned about the availability of skilled labour, the support provided by public institutions, and the cooperative fishing companies.

²² The attribution of a high degree of seriousness to a particular aspect, whether as a strength or as a weakness is not contradictory but rather reflects the fact that the interviewees, even if the frequency of answers differed between the two judgments (strength or weakness), assigned the same level of importance/seriousness, whether or not this was due to the presence or the absence of the factor their maritime district.



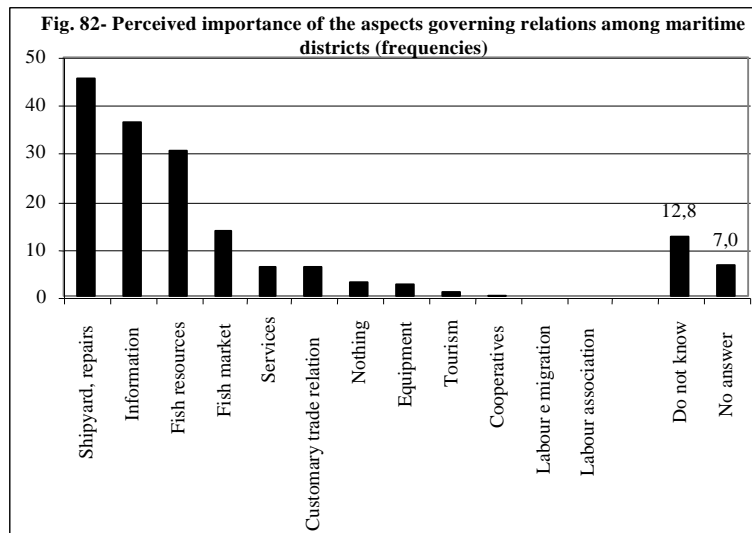
4.3.5 The relations among the maritime districts

The observed fact that the interviewees focused strongly on their respective maritime districts was confirmed when they were requested to compare the organization of their own maritime district with that of the other districts and to indicate the nature of the relationships among the different maritime districts (Figures 82 and 83).

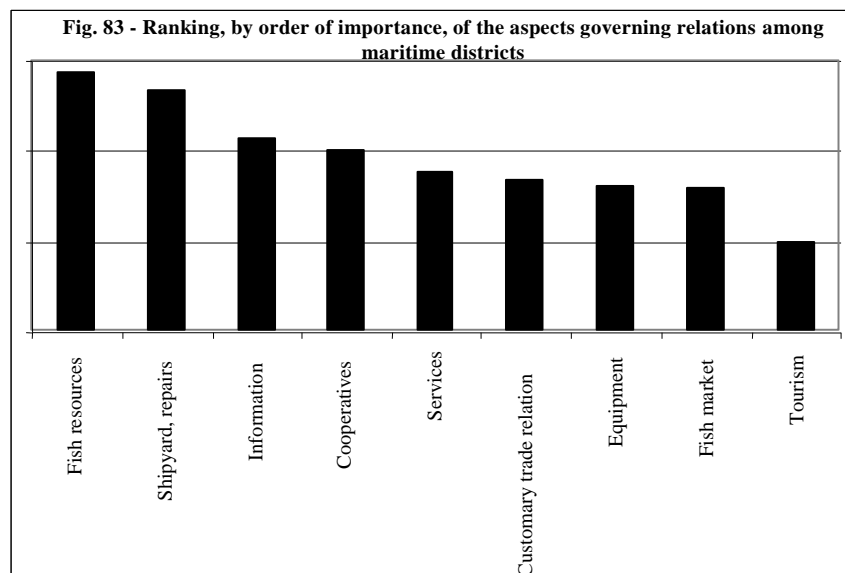
Regarding comparison among the different maritime districts in respect of organization, around 42% of the interviewees considered that there were some differences (7% of the sample) or that the other maritime districts were organized in a similar way (35% of the sample); the remainder had no view on the matter. The differences were considered to lie above all in a difference in the organization and management of the ports and in a difference in the organization of police controls.

Concerning the type of relations among the maritime districts, 5% of the sample considered the relations to be of a competitive type, while two-thirds gave a neutral evaluation, and the remaining 30% were not able to give a definite answer to the question²³.

The object of the relation with other maritime is not indicated by the 30% of the sample -the sum of who do not answer and the ones who do not know to answer- (Figure 43).



The remaining interviewees considered that the main factor in the relationship among the maritime districts was the services concerned with boat-building and vessel maintenance (46% of the sample); other important factors in the relations among the maritime districts were the exchange the information (36%), the sharing of the fish resources (31%) and the fish markets (14%).



²³ The uncertainty in the answers related to the fishing activity was higher among the interviewees from small fishing vessels (65% of the sample answers were in the category “Do not know”, compared to 56% of those from the large vessels); only 9% gave affirmative answers (9%) and there were no negative answers in either group of interviewees.

The ranking, in decreasing order of importance, of the factors determining the relationships among the maritime districts puts the sharing of the fish resources and shipyard services first, closely followed by the availability of information and existence of cooperatives (Figure 83).

4.4 Socio-economic aspects and crew categories

The examination of the socio-economic characteristics of the Albanian fishery sector is continued in the present subsection, but with a different emphasis. The data were analysed on the basis of the roles played by the interviewees in their respective crews. This was because a hypothesis was adopted on the relation of the responses to the different crew positions occupied by the interviewees; the hypothesis was validated for the three types of inquiry (the personal data, the crews' working conditions and fishing strategy, and the characteristics of the different maritime districts and the relationship among the districts).

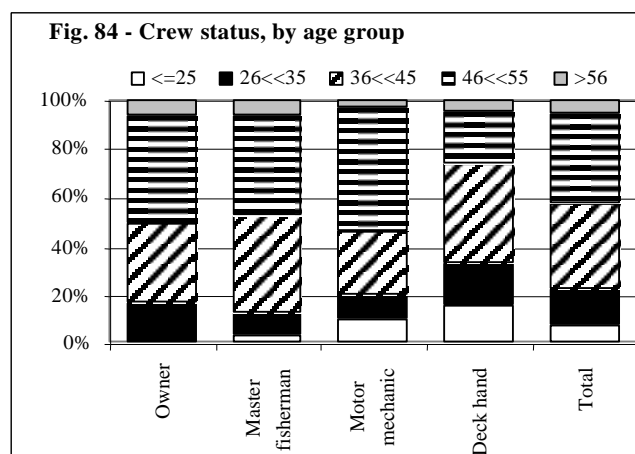
The role of each crew member on board was considered important not only with respect to the individual's personal profile (from the socio-cultural and economic points of view), but even in determining the modalities of the individual's relation with the fishing company and the respective maritime district, as well as that with fishers from other territorial realities

Five roles were considered for the crew: (i) the owner who does not perform any fishing activities aboard (known as an owner-entrepreneur); (ii) the owner who takes part in catching the fish (known as an owner-fisher); (iii) the master fisher; (iv) the motor mechanic; and (v) deck hand.

4.4.1 The fisher's profile

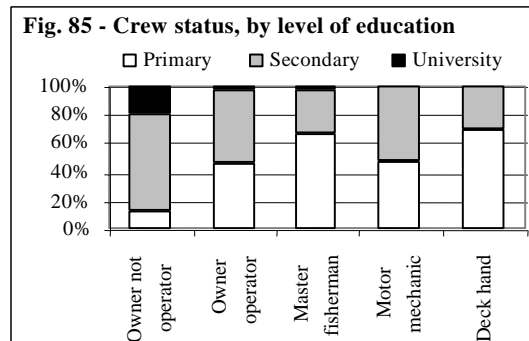
As expected, on average, ordinary crew members (deck hands) were younger than the specialists (owner, master fisher, mechanic).

Figure 84 shows that there are no essential differences in the professional standing of the owner and the master fisher between the ages of 46 and 55 years or more; this age group represents almost 50% of the owner and master fisher categories. There are no owners less than 25 years old.



Of the ordinary crew members (deck hands), one-third of the interviewees were less than 35 years old; the percentage of crew members between 36 and 45 years old was 41%.

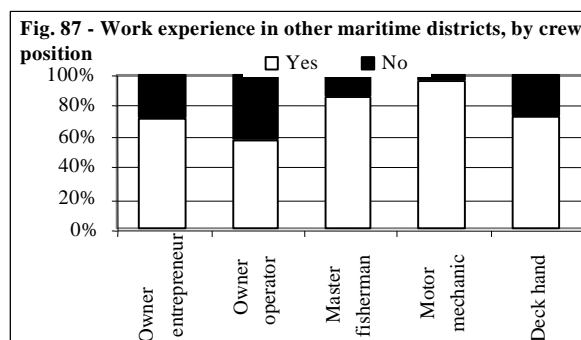
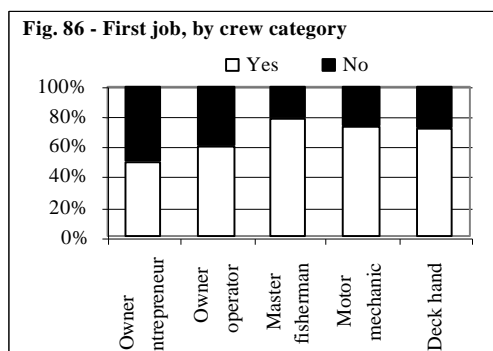
Figure 85 shows that there is a relationship between the role in the crew and the fisher’s level of education.



Only 20% of the owner–entrepreneurs graduated from university, whereas around 70% of the deck hands only had primary school education.

The majority of the interviewees were married; those with a single status, though modest in total number, fell mostly in the owner–entrepreneur and in the deck hand groups²⁴. It can not be excluded that level of education had an effect on the age of marriage; the data suggested that marriage was at a younger age among the ordinary crew members.

According to the owners interviewed, 15% considered that the presence of seasonal labour in the crews was not very common; furthermore, seasonal jobs would account for only a limited number of crew members and would be limited to the status of deck hand. Thirty-eight per cent of the owners included relatives in their own crews, the number being either one (70%) to two (30% of cases).



Fishing was the first job for the majority of the interviewees (Figure 86). Generally, however, there were considerable differences among the five crew roles considered, although the percentage of fishers in their first job increased as the status of the role decreased from owner to deck hand. Indeed, the fishery sector was their entry into the labour market for 50% of

²⁴ Although the results are linked to the age of the interviewees, age does not seem to be the only determinant of civil status, since the highest number of the single persons was found in the owner category and in the 26–35 year age group, whereas, in the other crew positions, the single persons have, significantly, an age of less than 25.

individuals in the role of owners and for around 80% in other roles (master fisher, motor mechanic and deck hand).

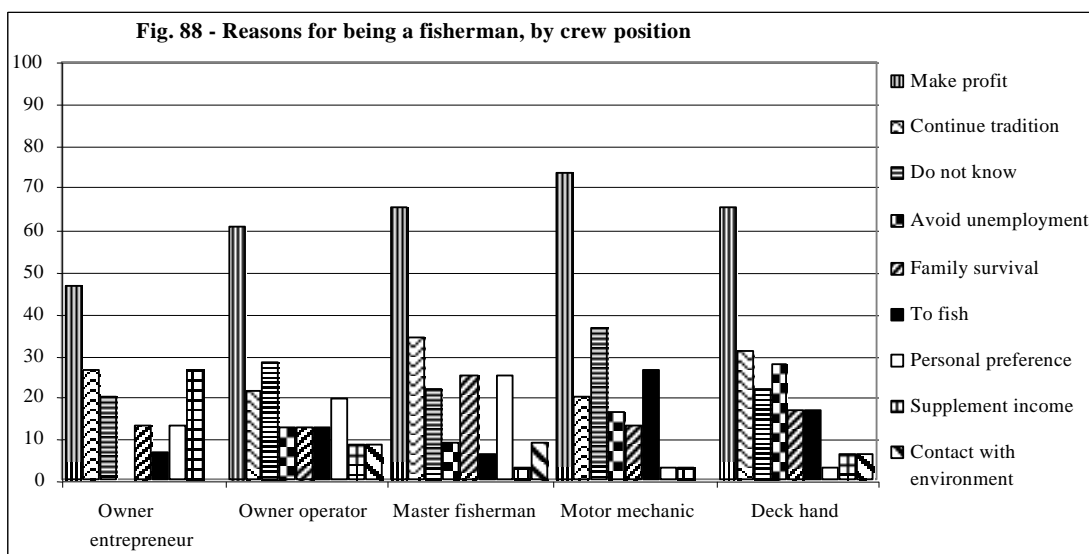
The mobility of the fishers among different maritime districts was sufficiently high, considering that, on average, 75% of the interviewees had had work experience in other maritime districts than the one of their actual job (Figure 87). The positions of master fisher and motor mechanic seemed to be those with a higher inter-district mobility, since more than 80% of the interviewees in the respective professional groups had been fisher's in another maritime district.

Of lesser importance, though at a percentage higher than 60% for the respective samples, was the job mobility among the owner and deck hand groups.

The motivations to work in the fishing sector were sufficiently differentiated in respect of the crew-member categories. Excluding the economic motivation, which holds for all the categories and above all for those on board, there were differences for other kinds of reason (Figure 88).

Comparing the two owner categories, there was a difference in the importance given to the economic motivation: it was more relevant for the owner-operators (over 60%). And regarding the owner-not operators, the opportunity for income integration was considered to be particularly important (about 27%, compared to only 8% for the owner-operators). The worry of being jobless was not present among the motivations of the owner-not operators, perhaps because of the above-mentioned possibility of having an income from other sources.

Contact with the environment was apparently not among the motivations of the owners-not operators, whereas for the owners-operators the motivation linked to love of fishing was more relevant (12%, compared to 7% for the owner-not operators). Nevertheless, besides the economic reasons, the remaining motivations of the owner-operators were broadly similar in frequency, but it should be kept in mind that 28% of the interviewees did not give a specific response.



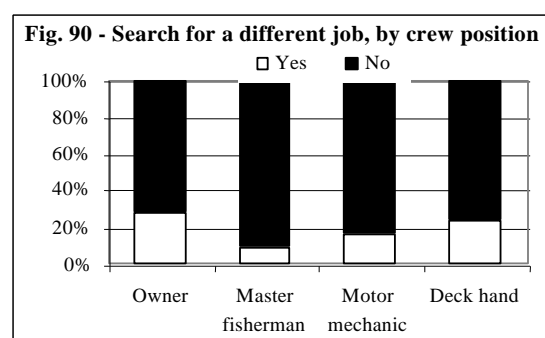
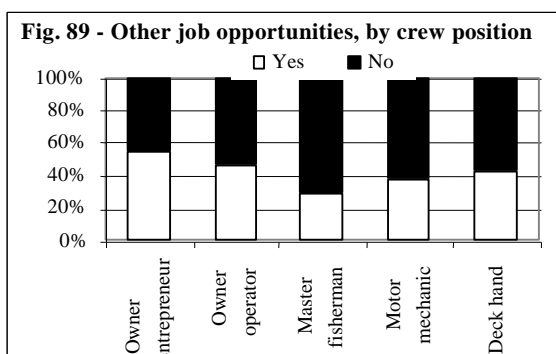
For the master fishers, apart from the economic reason (to make a profit), a significant degree of importance was attributed to the continuation of the tradition as a job motivation; the requirement of supporting the family and for personal preference were two other motivations of a certain importance.

Regarding the role of motor mechanic, besides the economic motivation, 37% of the interviewees did not express any particular motivation; 27% of the sample considered fishing to be important, but few specified contact with the environment or personal passion for the job as being important factors.

The fear of being unemployed was strong, above all in the opinion of ordinary crew members; this may be because they considered being a fisher was an important motivation and contributed to the continuation of the family tradition.

To evaluate better the motivations that lead different interviewees to continue in their present job as fishers the answers given to the questions on the existence of other job opportunities, the search for a different job in the past and future employment possibilities may be considered.

Job opportunities other than those in the fishing sector were considered to be higher in number by the owner group and lower by the other crew groups (Figure 89).



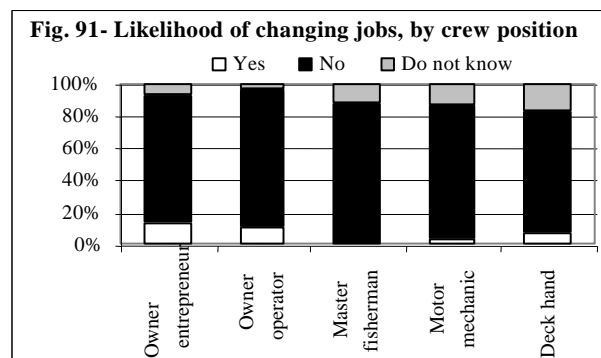
Regarding other job opportunities, less than 30% of the master fishers and around 40% of the two other crew categories (motor mechanic and deck hand) said that they had had other job opportunities, suggesting that the lower crew categories of crew were in a critical job situation.

If the preceding information only indicates the existence or not of other job opportunities, the next question was aimed at evaluating whether the interviewees had taken an active role in labour market and had actually looked for a new job (Figure 90).

Generally, interviewees had made at least some effort to look for a job other than that of fisher (21% on the entire sample). The most active search for a different job was found in the highest and the lowest categories of crew member: the owners (26%) and the deck hands

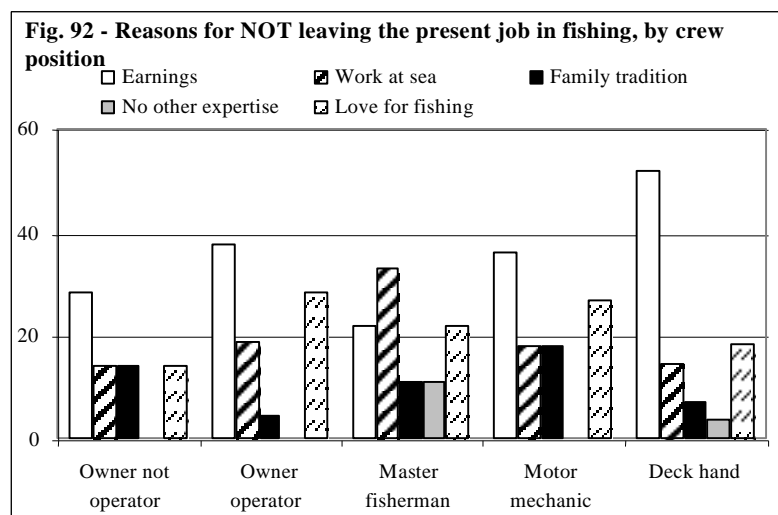
(25%); in contrast, the master fishers (9%) were the least active group in searching for a different job.

Regarding possibility of looking for a different job in the future, 81% of the interviewees thought they would remain in the fishery sector; such a prospect was most likely for the master fishers, the owner–fishers and the motor mechanics (Figure 91). Only 7% of the interviewees, overall, considered the possibility of changing their present job.



Seventeen per cent of the deck hands did not know what their prospects were; for the other categories, the values were: owner–entrepreneur, about 8%; owner–operator, 4%; master fishers, 12%; motor mechanics, 15%; and deck hands, 18%.

Given these results, it was interesting to consider the motivations that lead the different crew categories not to abandon the fishing sector (Figure 9).

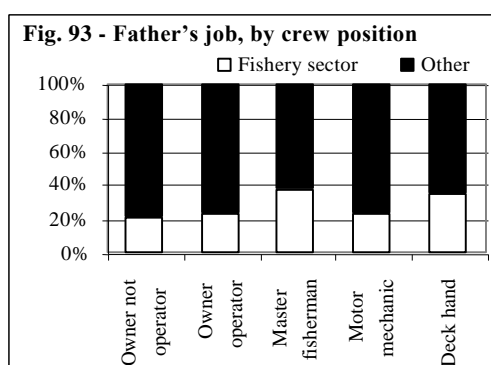


Firstly, it was observed that the main reason given for not leaving the fishery sector was the income from fishing in all the crew categories except that of master fisher. The most motivated by such a consideration were the deck hands (54% of the group). The main reason for the master fishers was the possibility to work in a marine environment.

The second most common motivation, given by all the categories was “love for fishing”, particularly among the owner–operators. Continuity of the family tradition was manifested mainly by the owners–not operators, thus distinguishing them from the owner–operators and the motor mechanics.

If these motivations represent the strengths of a career in fishing, which could attract others into the sector, there was another reason that constituted a barrier to employment in the fisheries sector: the lack of skills specific to the sector; this lack was particularly felt by the master fishers, whose work on board a fishing vessel requires very specific skills.

The continuity of the family tradition was considered to be of only moderate important as a motivation for those remaining in the fishing sector; this is partly explainable by the relatively small percentage (29%) of individuals whose fathers’ have worked or still work in the same sector (Figure 93).



If, overall, the responses to the two questions—the reasons for remaining in the fishing sector and the work of the father—are coherent, when they are examined according to the different crew categories, two types of situation may be seen which may be explained only with some difficulty on the basis of the responses to the two questions.

In the first situation, the continuity of the family tradition as a motivation seemed to be less relevant precisely in the crew categories for which it was more frequent that the job of the father was also in the fishing sector: thus, for the master fishers, deck hands and owner–operators, the motivation of the family tradition was felt less in the determination of their continuation in the sector. A second type of situation was that pointed out by the owner–not operator, who, even with a higher frequency of fathers working in the fishing sector, attached greater importance to the possibility to continue to develop their own activity in the fishing sector with a view to continuing the family tradition.

The initial difficulty in combining the results from the two questions may be overcome by resorting to a consideration at two levels, which may allow plausible situations to be determined.

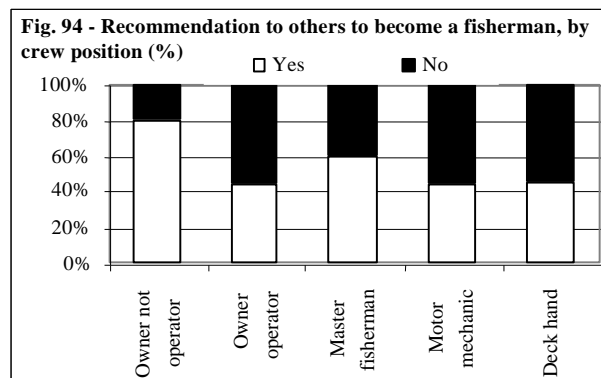
First, even in the cases in which the father has worked in the same sector, the little importance given to the continuation of the family tradition can be attributed to the fact that

the father and son do not have the same kind of job in the fishing sector; such information was not revealed by the questionnaire; or that the son does not share the same values as his father's.

Second, the situation of the owner–not operators could be more easily explained if it is hypothesised that the continuation of the family tradition is embodied in the capital invested in the vessel and the fishing gear and other equipment, regarding which, the owner–not operator's son considers it important to multiply and redeem, and therefore not necessarily by continuing in his fishing job.

The high number (70%) of those who have not continued their fathers' activity in the fishing sector compelled a deeper analysis of the father's activity in order to verify the existence or non-existence of any cross-relation of work sectors between fathers and sons among the different crew roles. There did not seem to emerge with high frequency any particular inter-sectoral relations: the fathers' employment was present in almost all the main economic sectors and with no significant among the various sectors.

An evaluation of the reasons that linked the interviewees with the fishing profession included subjective personal aspirations and possibilities, and limits that could reflect a personal situation, whether of satisfaction or dissatisfaction. The weight of these subjective evaluations may have become lower when interviewees were asked to advise others on the matter of entering the fishing profession (Figure 94).



If the group of owner–not operators is excluded, since they are 80% favourable to the idea of recommending others to join the fishing profession (a recommendation probably linked to their own high professional standing), the other crew categories differed in their responses to the question. About 60% of the master fishers gave positive answers, while the other crew categories gave negative answers: on average, 55%.

The consistency between both points of view – those who would advise others to become fishers, and those who would not – makes an examination of the motivations of the two groups interesting (Figures 95 and 96).

The main motivations of the group that would recommend employment as a fisher (Figure 95) were as follows:

75% of the owner–not operators and 95% of the owner–operators specified the high earnings, compared to only about 42% of the master fishers and 45% of the motor mechanics and to about 58% of the deck hands.

The pleasure to be gained from fishing was specified by 72% of the deck hands and 64% of the master fishers, followed by 50% of the owner–operators and 45% of the mechanics, and only 35% of the owner–not operators.

The percentages of responses for each crew category regarding the motivation of working in a marine environment were less divergent, ranging from 55% (for the mechanics) down to 35% (for the owner–operators).

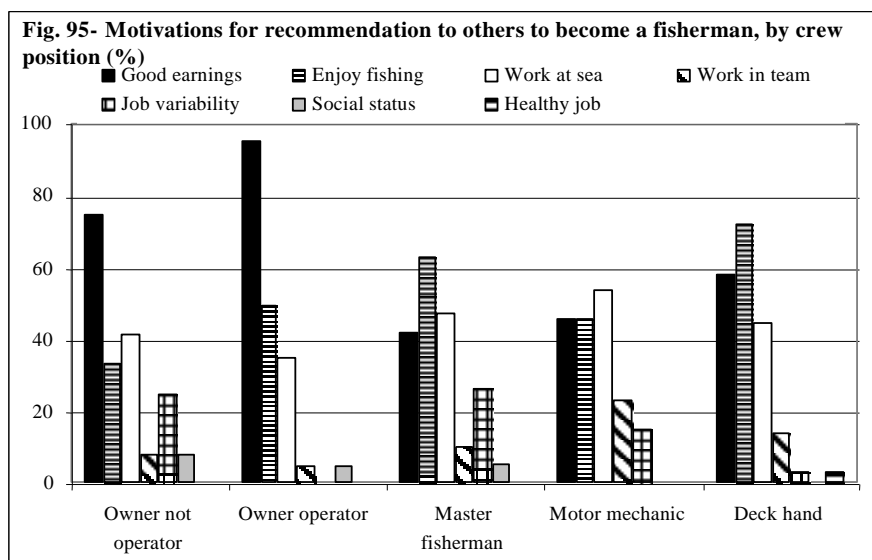
The percentages of responses for each crew category regarding the motivation of working in a team were much lower, between 23% (for the mechanics) and 6% (for the owner–operators).

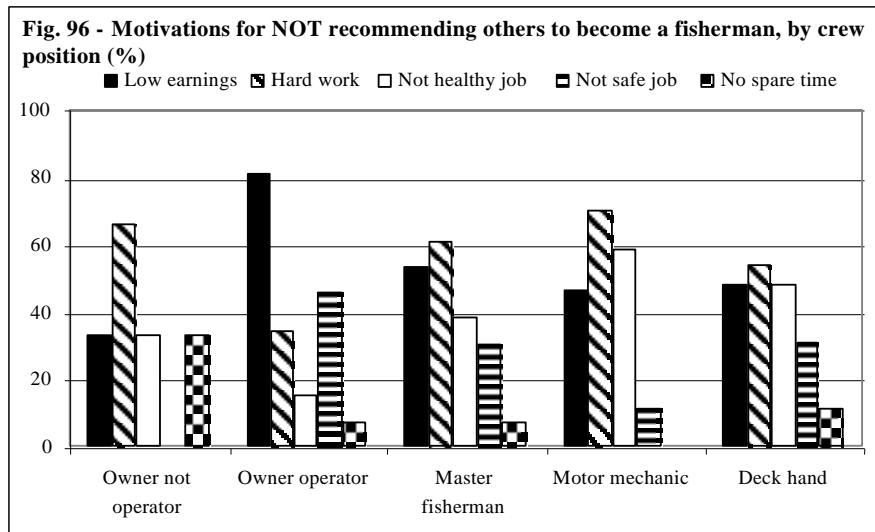
Those regarding variety in the work covered a much wider range, from 34% (for the owner–not operators) to 0% (for the owner–operators).

Social status of the job was given low priority (from 0% to 8%) by all crew categories, and the motivation of a healthy job was 0% for all crew categories except deck hands (4%).

Only two of these “positive” motivations were comparable with the “negative” motivations of the second group: those who would not recommend employment as a fisher. While, as noted above, 95% of the owner–operators considered high earnings as the principal “positive” motivation, 82% of them also gave low earnings as a “negative” motivation, and this approximate, though “contradictory”, similarity was also observed in the responses of the other crew categories, except that of the owner–not operators (75% compared to 34%).

All crew categories considered the job of fisher as being unhealthy (ranging from 58% of the mechanics down to 14% for the owner–operators).





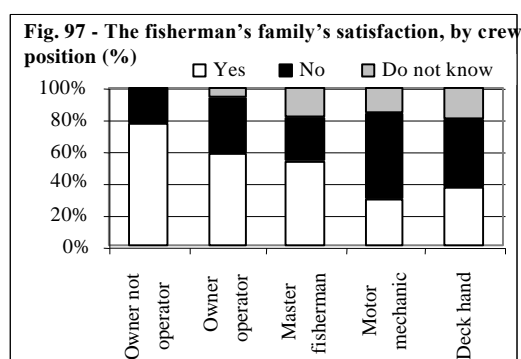
The “negative” motivations of the second group – those who would not advise anybody to work in the fishery sector – apart from the two just discussed (earnings and healthiness of the job) (Figure 96) cannot be compared directly with the “positive” motivations of the first group.

The mechanics (71%), the owner–not operators (67%) and the master fishers (61%) considered the hardness of the job the most important motivation for advising against being a fisher, followed by the deck hands (53%) and, finally, the owner–operators (35%).

None of the owner–not operators considered the danger of the job a motivation in this context, but for the other categories the percentages, although all minority percentages, were significant: 46% for the owner–operators, 31% for the master fishers and for the deck hands, and 12% for the mechanics.

Finally, the “negative” motivation of “no spare time” was evoked by 35% of the owner–not operators, 12% of the deck hands, 7% of the owner–operators and of the master fishers, and 0% of the mechanics.

Some conclusions may be drawn from the foregoing analysis in order to evaluate the degree of satisfaction that the fishers get from their work. Beside their own personal satisfaction, it was considered important to evaluate the degree of satisfaction the workers think their family get from their jobs as fishers (Figure 97).



The fisher’s family’s satisfaction with his employment was considered positive by 47% of the interviewees, overall; by crew category, the degree of satisfaction was 77% (owner–not operators), 58% (owner–operators), 52% (master fishers), 30% (motor mechanics) and 37% (deck hands).

The corresponding values for the “negative” (dissatisfaction) responses were: 23% (owner–not operators), with no “Do not know” answers; 35% (owner–operators), with 7% “Do not know” answers”; 28% (master fishers), with 18% “Do not know” answers”; 54% (motor mechanics), with 16% “Do not know” answers”; and 43% (deck hands), with 20% “Do not know” answers”.

The higher percentage of “negative” answers given by the owner–operators category, compared to the owner – not operators category is probably due to the higher working time at sea of the owner–operators. For the other crew categories, the frequency of a “negative” response was not as might have been expected – with the deck hands being the most sceptical and the master fishers being the least sceptical. In fact, the order (of percentage of “negative” responses) observed was: the motor mechanics (54%); the deck hands (43%); and the master fishers (28%).

The reason why the motor mechanics gave such a high percentage of “negative” responses is not clear.

Table 15 gives the reasons for the fishers who considered that their families were satisfied/dissatisfied with their employment in the fishery sector, by crew category²⁵.

Table 15. Motivations for family satisfaction/dissatisfaction with fishing (%)

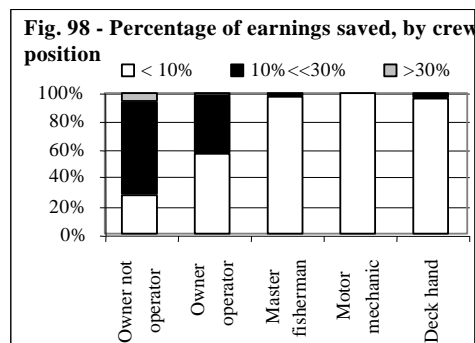
Crew category	Satisfied				Unsatisfied				
	Sufficient earnings	Social status	Family tradition	Spare time	Low earnings	Hard work	Too long working hours	Low safety	Health risk
Owner–not operator	90.0	10.0	20.0	20.0	33.3	33.3	33.3	66.7	33.3
Owner–operator	96.3	3.7	25.9	14.8	75.0	12.5	12.5	75.0	18.8
Master fisher	94.1	0	41.2	35.3	77.8	11.1	11.1	77.8	22.2
Motor mechanic	100	0	33.3	22.2	62.5	12.5	50.0	50.0	25.0
Deck hand	83.3	0	29.2	16.7	77.8	11.1	33.3	51.9	14.8
Total	92.0	2.3	29.9	20.7	71.8	12.7	29.6	60.6	19.7

The percentages are clear. For the interviewees who thought that their families were satisfied with their employment in the fishery sector, for all crew categories, the percentages were very high in respect of earnings, although that for the deck hands was the lowest. Only the two categories of vessel owners thought that the social status of fisher was a motive of satisfaction, though even they thought it unimportant. The continuation of a family tradition

²⁵ The percentages were calculated on the basis of the positive or negative answers given by the interviewees within each crew category

in fishing as a reason for their families' satisfaction was highest among the master fishers, followed by the mechanics and the deck hands; the owners' score was somewhat lower. Regarding those who believed that their families were dissatisfied with their employment as fishers, low earnings was the predominant response by all crew categories except that of the owner-not operators. By contrast, one-third of the latter gave "Hard work" as a motivation for dissatisfaction, whereas all the other crew categories gave this motivation only about 11%–12% of the time. The mechanics gave "too long working hours" the highest percentage of dissatisfaction, probably because they put in more "overtime" caring for their engines, this being a tradition in the maritime world. On the other hand, the mechanics and the deck hands had appreciably lower percentages for the response to the question of "safety in the work place". And no category gave a high importance to the "health risk".

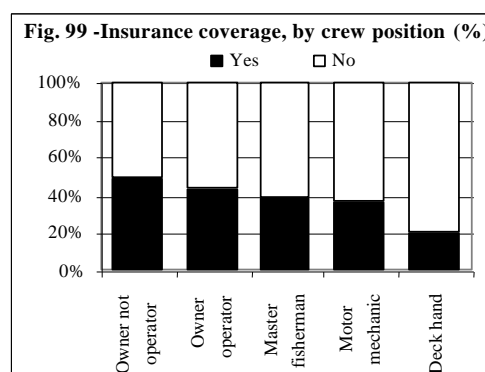
The last question of the questionnaire on personal data (question 3.1.I.22) concerned the proportion of earnings (from fishing) saved (Figure 98). As expected, the percentage differed greatly between the owner categories and the other crew categories. The mechanics said they saved nothing at all to speak of, and the percentages for the master fishers and the deck hands were under 5%.



It could be expected, however, that master fishers and mechanics would earn enough to allow a greater level of saving than was observed, and that deck hands would have too low a level to allow any savings. In this context, the incidence of the individual's civil status—single or married with children—has, nevertheless, to be considered in the evaluation of the capacity to save in the different crew categories.

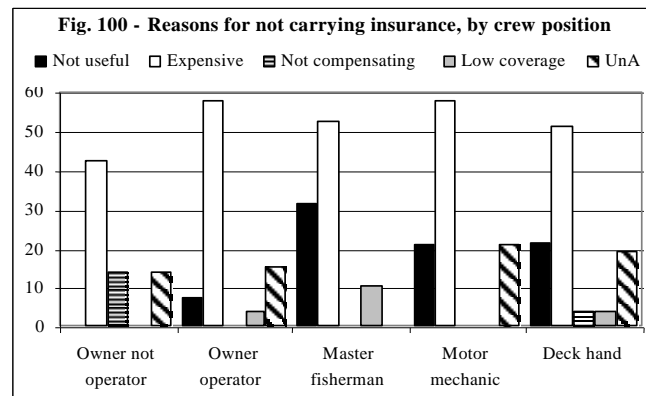
4.4.2 Crew working conditions and fishing strategy

A relevant aspect of the conditions under which fishers work is the insurance coverage against the risks of fishing itself (Figure 99).



Less than 50% of the interviewees were covered by insurance, regardless of the crew category; this percentage ranged from almost 50% for the owner–not operators down to 20% for the deck hands.

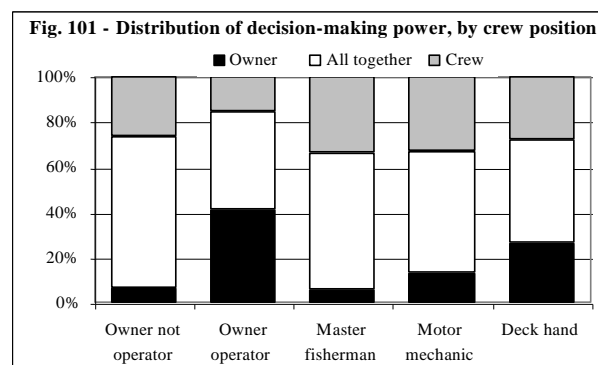
The reasons given for not being insured did not differ greatly among the crew categories; all considered the available coverage expensive (from 45% for the owner–not operators to 58% for the owner–operators and the mechanics (Figure 100).



Somewhat surprisingly, the crew categories more exposed to risk – the master fishers, the mechanics and the deck hands – did not judge such insurance coverage to be useful. A comparatively high percentage (20%) of the two latter categories, moreover, did not answer the question. This could be indicative of the uneasiness felt by some crew members towards this question, which could be interpreted variously²⁶.

Regarding the liabilities of fishing, notably from the manoeuvring of the fishing gear and deck equipment), 70% of the owners had had personal experience of it: engine breakdown (64%), and drowning/near-drowning incidents (27%), being the most common risks cited. Only three owners stated that they had their own vessel insured, but there were 40 negative responses and 17 “Do not know” responses.

An important area of inquiry was the relations among the crew members aboard the fishing vessel, especially as concerns the fishing tactics and the related decision-making. The decision-making power on the intensity of the fishing effort was, in most cases, considered by the interviewees to be in the hands of the crew as a whole: the owner–operators (44%); the master fishers (60%); the mechanics (36%); the deck hands (33%). The response of the owner–not operators, in this case, was 67% (Figure 101).

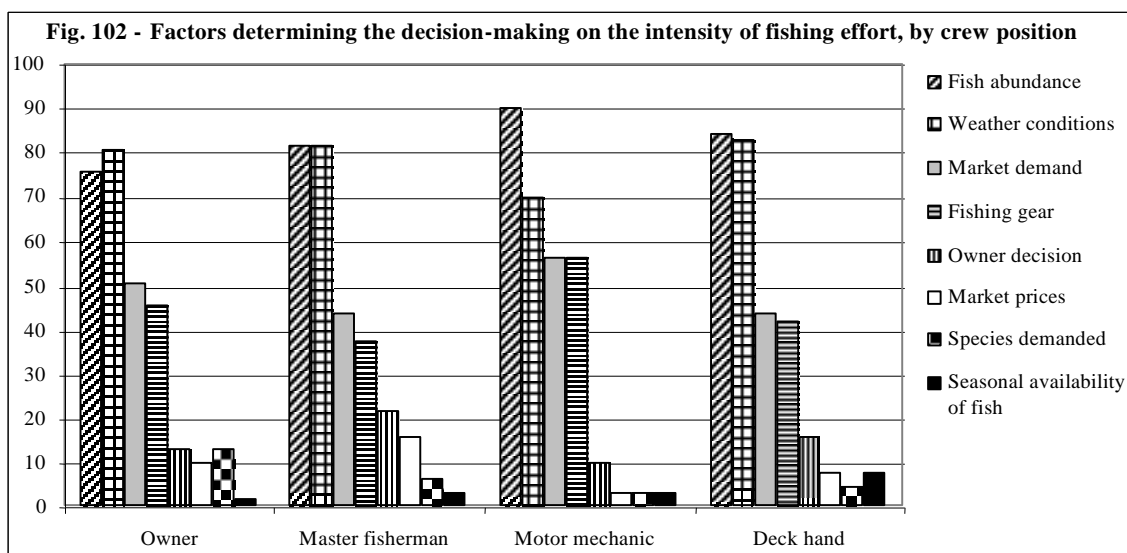


²⁶ See section 4.2

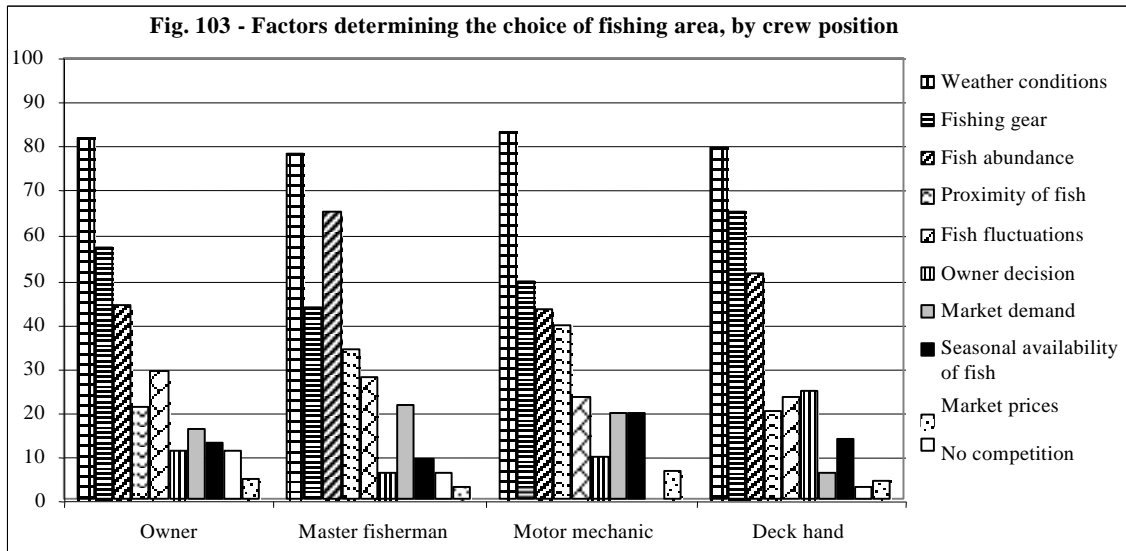
The two crew categories that most considered that the decision-making power lay exclusively with the owner were the owner–operators (42%) and the deck hands (26%); the other three categories (owner–not operators, master fishers, mechanics) gave only few responses.

All the crew categories had significant (though not majority) percentages attributing decision-making power to their respective categories: the owner–not operators (27%); the owner–operators (15%); the master fishers (33%); the mechanics (33%); and the deck hands (28%).

The answers on the determinant factors in the attribution of the decision-making power with respect to the intensity of the fishing effort do not differ greatly among crew categories (Figure 102). The abundance of the resources and the weather conditions were considered to be the two main factors, together representing around 80% of the responses. A second group of factors, to which the different crew categories attributed an average importance (about 50%), comprised the market demand for the fish and the type of fishing gear available on board. All other factors, including the owner’s sole decision, were considered to be marginal in the determination of the intensity of the fishing effort.

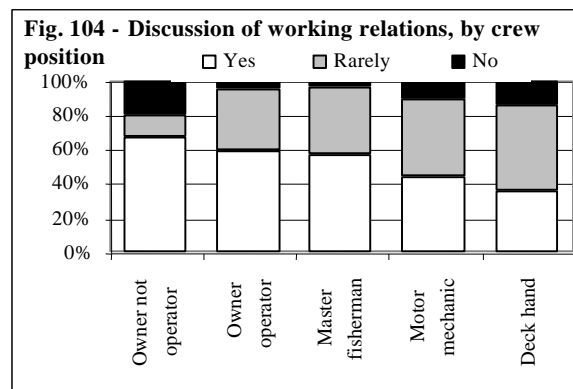


For the factors considered to determine the choice of the fishing area, the opinions of the different crew categories (Figure 103) did not differ greatly from those for the preceding question (Figure 102). The opinion prevailing most among the different groups indicates the weather conditions as determinant in the decision making. To the remaining factors – fishing equipment, abundance of the resources, proximity to the area and so on – the importance attributed by the five groups of individuals presents some differences, both in the percentage and in the attributed importance rank. Even in this case the decision-making importance of the owner figure is factor of marginal relevance in the opinion of all the groups of individuals.



To evaluate the quality of the relationship between the owners and the other crew categories, the interviewees were asked to indicate the existence of specific occasions on which the working relations were discussed.

Figure 104 shows the gross frequencies (“Yes”, “Rarely” and “Never”) attributed by the interviewees.



The frequency of the answers was as follows.

For “yes”—68% (owner–non-fishers); 59% (owner–fishers); 56% (master fishers); 43% (motor mechanics); and 36% (deck hands).

For “rarely” – 12% (owner–non-fishers); 36% (owner–fishers); 40% (master fishers); 45% (motor mechanics); and 51% (deck hands).

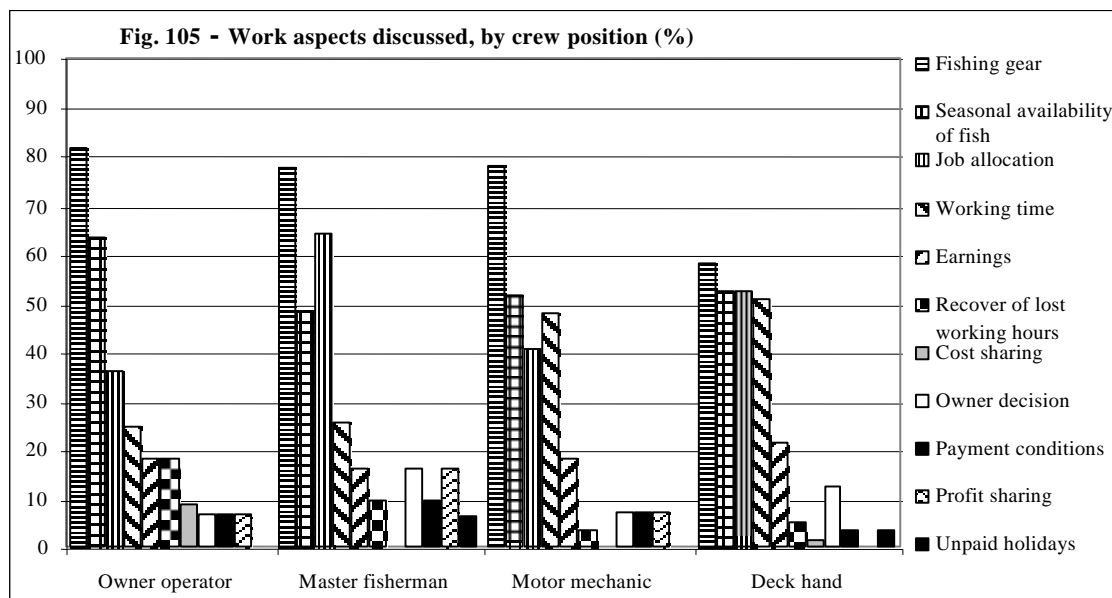
For “no” (i.e. “never”) – 20% (owner–non-fishers); 5% (owner–fishers); 4% (master fishers); 10% (motor mechanics); and 15% (deck hands).

The object of discussions among the crew members (Figure 105) could be limited to purely technical aspects of the fishing itself. These aspects are external to the individual and are related to, for example, the fishing gear and deck equipment or the state of the fish resources.

Another object of discussions is the organization of the fishing itself, which influences the personal and the collective aspects; these can be modulated by discussion; they include reallocation of the work among the crew members, working hours and the decisions of the owner.

Then there are the “economic” aspects of the working relations, which strongly involves the individual fishers and the crew as a whole. Economic aspects can constitute a strong element of conflict which could be resolved by modification of the contractual relationship or in its termination. The main elements are the criteria and modalities of sharing the costs (of fishing), of the profits from fishing, the terms of payment, unpaid holidays and the recovery of lost working hours.

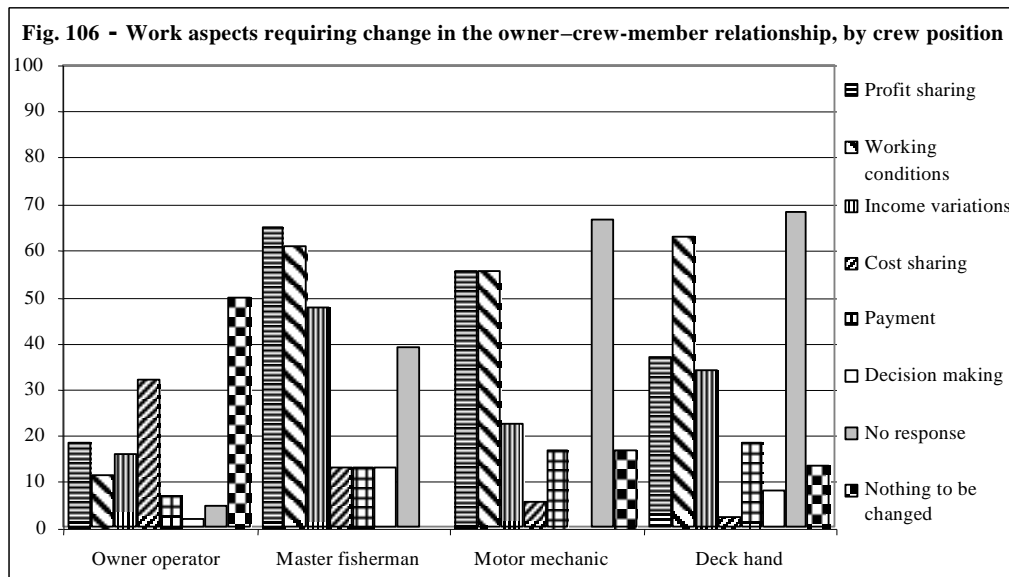
Figure 105 shows the importance, in terms of percentages, of eleven aspects of the work relationships aboard a fishing.



For all crew categories (the non-operative owner category is not considered), the three most important aspects were the fishing gear, the fishing season and the on board job allocations; while the working time (time at sea) was not so important for the operative owners and the master fishers, it was, as may be expected, important to the mechanics and the deck hands. The remaining aspects (earnings, recovery of lost working time, cost-sharing, incidence of the owners’ decisions, conditions of payment, profit sharing and unpaid holidays) were all of somewhat less significance, although the percentages for earnings were somewhat higher than for the other factors here.

In summary, the “technical” and the “organizational” aspects greatly outweighed the “economic” considerations. In general, the fact that the “economic” considerations were much less important to the motor mechanics and the deck hands than might be expected may reflect the existence of a power hierarchy that would minimize the economic factor as an indicator of satisfaction with the working relationship on board.

The fact that some topics were not subjects of discussion among the crew members does not necessarily indicate that there was no wish to modify them; some topics were considered by some of the interviewees to call for no change (Figure 106).



The profit-sharing and the working conditions were considered by all the active crew categories, except the operative owner, to be the two most important factors requiring change, though, of the remaining categories, the deck hands appeared to be the least interested in the profit-sharing aspect (37%); conversely, only the operative owners (50%) considered that nothing needed to be changed, compared to 0% for the master fishers, and roughly 15% for the mechanics and the deck hands. Income variation was of lesser importance for the operative owner than for the other three categories. Such variation was linked to the topic of profit-sharing, about which, the master fishers in particular complained (47%).

For the owners the most important item to be modified was the cost-sharing and not, as was mentioned above, the profit-sharing²⁷.

The method of payment related principally to the question of frequency of payment, but the variation in earnings was thought to be in need of modification mostly by the master fishers (47%), then the deck hands (35%) and the mechanics (23%); in contrast, only 17% of the owner–operatives thought that earnings variation was a matter of concern.

²⁷ There was no difference in the position of the non-fishing owners from that of the owner–fishers. The main difference was between them was the greater importance that the non-fishing owners gave to the need to change the mode of profit-sharing among crew members.

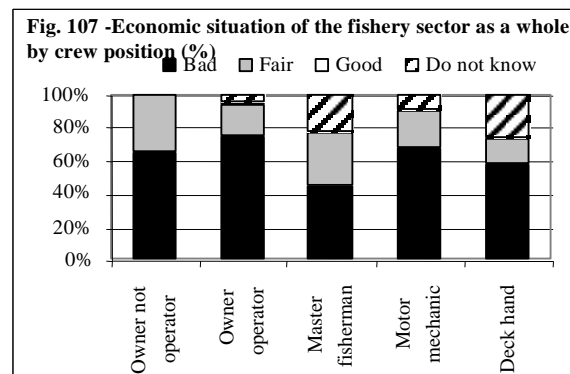
The comparatively high percentages of “No response” cannot be considered an indication of a satisfactory working relationship; the percentages were highest for the deck hands (68%) and the mechanics (67%), the master fishers (39%) and the owner–operators (7%). None of the crew categories considered it necessary to make modifications in decision-making.

4.4.3 Maritime districts: characteristics and relations

The differences among the crew categories that emerged from a consideration of the views of individual interviewees about their own jobs as fishers changed when they were asked to express their opinions on various aspects of the fishery sector as a whole, either nationally or by maritime district.

4.4.3.1 The present economic situation

The perception of the present economic situation of the fishery sector is given in Figure 107.



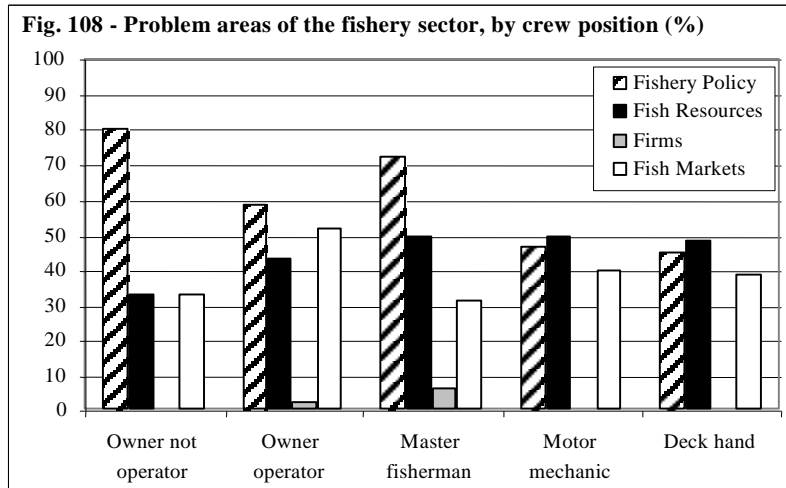
All the crew categories largely agreed that the situation was not good. In descending order: owner–operators (73%); mechanics (68%); owner–not operators (63%); deck hands (57%); and master fishers (45%).

The view that the situation was fair was common to all crew categories and to a similar degree, ranging from 37% for the owner–not operators down to 14% for the deck hands. None of the owner–not operators gave a “Do not know” response, followed, in ascending order, by the mechanics (9%), the master fishers (24%) and the deck hands (26%).

No crew category considered the economic situation good.

4.4.3.2 The present problems of the fishery sector

One aspect was common to all the crew categories: that the fishing companies themselves were not a source of the sector’s problems. This was certainly a defensive response that externalized the sources of the problems perceived: policies, resources, markets (Figure 108).



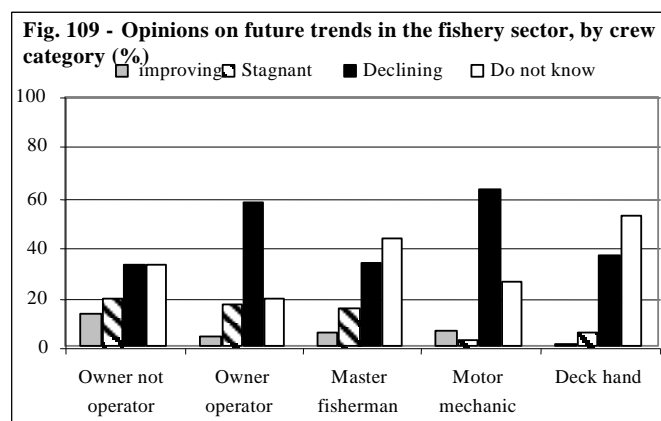
All the crew categories attached significant importance to (governmental or maritime district) fishery policy as a source of problems for the sector: owner–not operators (80%) and owner–operators (59%); master fishers (72%), followed by the mechanics (47%) and the deck hands (46%);

The fish resources (largely in terms of abundance and availability – either to the gear or seasonally) were regarded as being almost equally important (around 50%) as a problem source by the master fishers, the mechanics and the deck hands, and somewhat less so by the owner – operators (44%) and the owner – not operators (33%).

The view that the fish markets were a significant source of problems was common to all the crew categories, ranging from 52% for the owner–operators down to 32% for the master fishers. Only 3% of the owner–operators and 6% of the master fishers thought that the fishing companies were a source of the sector’s problems.

4.4.3.3 The future problems of the fishery sector

The opinions on the future trends in the Albanian fishery sector confirmed, in many cases, the views already expressed by the interviewees on the present situation of the sector (Figure 109).

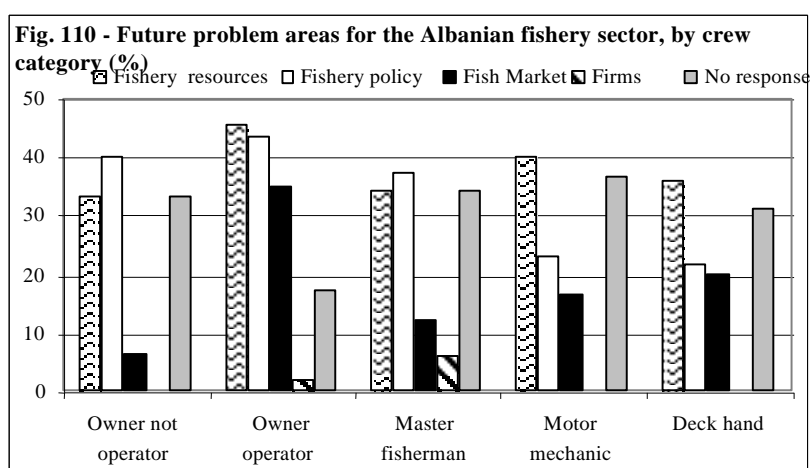


The mechanics (64%) and the owner–operators (58%) judged that the state of the fishery sector was declining; the deck hands (36%), master fishers (35%) and the owner–not operators (34%) were somewhat less convinced.

The view that the sector was stagnant (range of 5%–20%) or improving (range of 2%–15%) was much less frequently expressed.

Again, the “Do not know” answers were significantly frequent: deck hands (54%), master fishers (44%), owner – not operators (34%), mechanics (27%) and owner – operators (20%). This suggests that all the crew categories had some difficulty in arriving at precise evaluations, whether for the present situation or for the future situation of the sector.

Regarding the expected future problems of the Albanian fishery sector (Figure 110), all the crew categories considered the fish resources to be the most important problem for the sector: owner – operators (46%), the mechanics (40%), and the deck hands, master fishers and owner – not operators (all roughly 35%).



Fishery policy was also considered to be a future source of problems, particularly by the owner–operators (44%), the owner–not operators (40%), and the master fishers (37%); and less so by the mechanics (23%) and the deck hands (22%), probably because they are under only a secondary obligation to apply the policy.

Somewhat surprisingly, the marketing of the fish catch was only of significant importance (35%) to owner – operators and, to a lesser degree (20%), the deck hands. For the other categories: mechanics (16%); master fishers (12%) and owner – not operators (7%).

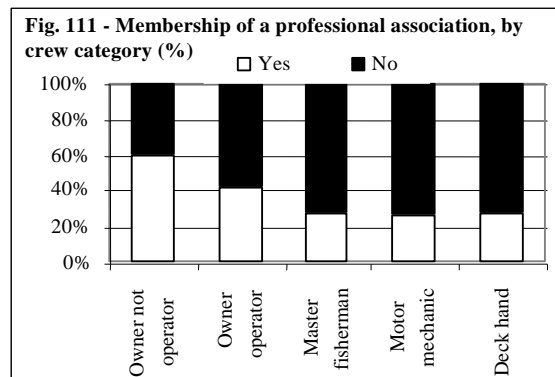
Only the owner – operators (3%) and the master fishers (7%) responded with respect to the possibility that the fishing companies could be a source of problems.

As for many other questions, there was a comparatively high percentage of no answers in all crew categories: mechanics (37%); master fishers (34%); owner – not operators (33%); deck hands (31%); and owner – operators (17%).

The relations with other vessels and crews²⁸ did not constitute a source of perceived future problems for 27% of the owner – not operators and the average for the crew categories all together (including the owners) was 37%.

4.4.3.4 Membership of fishers' professional associations

Given the relatively low importance attached to possible conflict among vessels and among crews, it was not surprising that the interviewees, all together, did not find it of great value to belong to a professional association (e.g. trade union, fishers' association) (Figure 111).



The percentage of crew members claiming membership of a professional fishery association decreased from the first to the last crew category: owner–not operators (60%); owner – operators (41%); master fishers, mechanics and deck hands (all about 27%).

Although the conflict, relations were not problematical, the low level of membership of professional association cannot be considered as positive in respect of the crew categories that could be thought to be in major need of representation (through such associations) in the defence of their interests.

4.4.3.5 Trade and markets

Having considered the main features of the Albanian fishery sector, the following analysis considers the relations with entities external to the fisheries themselves, notably the market, the maritime districts and the maritime fishery areas of other countries.

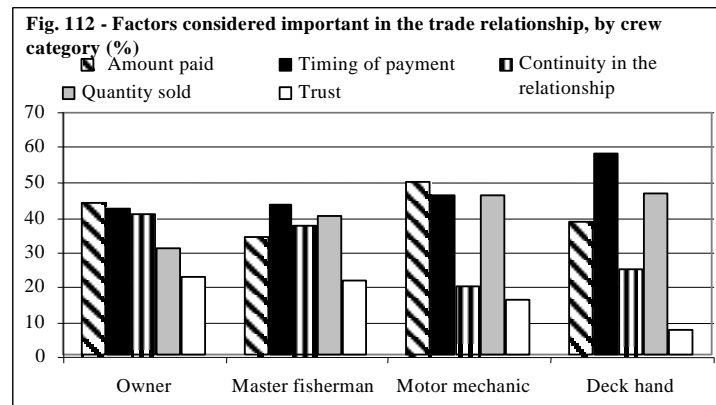
The relationship with the market can be viewed in terms of the trade relationship and of the market infrastructure.

This relationship is of greatest direct concern to the vessel owners, whether owner–not operators or owner–operators; regarding the other crew categories, the interest lies in

²⁸ In the questionnaire there were two questions on the problems perceived in working relations, one with other vessels and the other with other crews. The responses to the two questions were pooled, since significant differences in the percentages, for all the ccties did not emerge. However, the master fishers did consider the relations among vessels more problematical (34%) than those among crews (28%). For the other crew categories, the percentages were the same.

understanding whether and when they are involved in the trade transactions and whether their perception of this aspect differs from that of the owners.

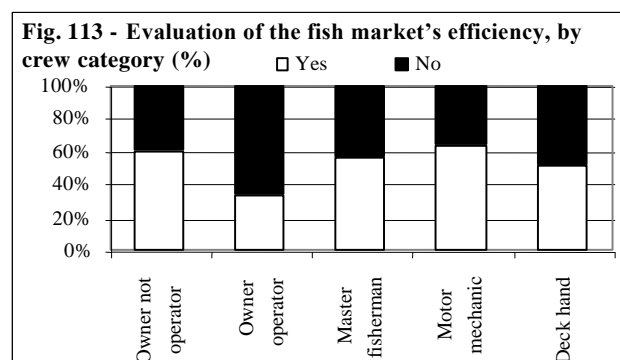
Figure 112 shows the important factors in the trading relationship in the view of each crew category.



For all crew categories, the main factors concerning the actual sale (amount sold and the price paid, together with timely settlement) were given comparatively high importance. The importance of trust between seller and buyer was somewhat higher for the owners (23%) and the master fishers (22%) than for the mechanics (17%) and the deck hands (8%). Closely related to this consideration was the duration or continuity of the seller–buyer relationship; in descending order of perceived importance were: the owners (41%) and the master fishers (35%); the deck hands (25%) and the mechanics (20%).

The different levels of importance that the crew members state give to the trading relations may be affected by the fact that the crew is remunerated in proportion to the income from the sale of their fish catch.

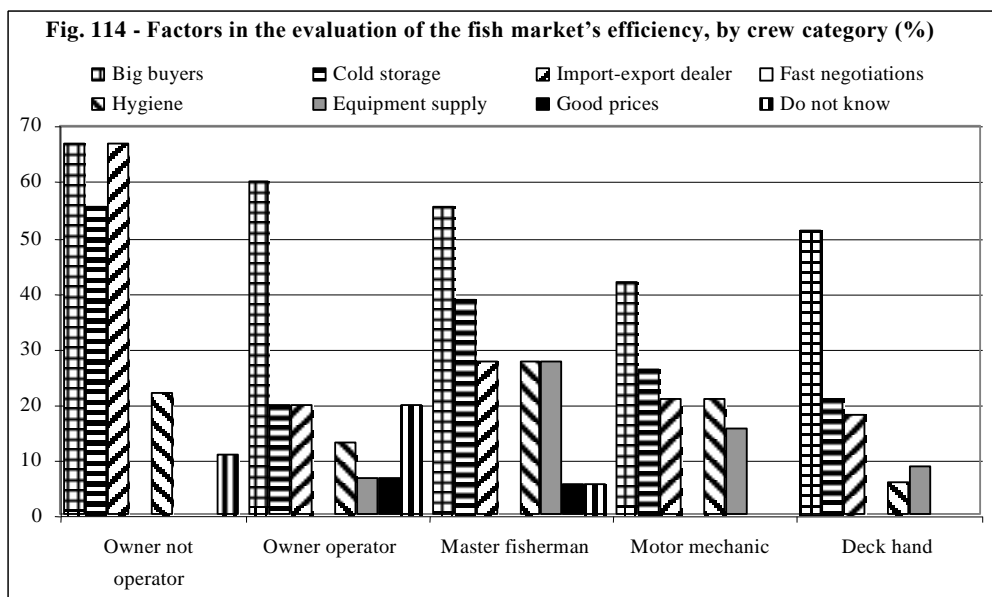
Referring to the infrastructure of the local market, all crew categories were, roughly speaking, equally divided in judging it to be efficient or inefficient (Figure 113).



The percentages of those who considered the market infrastructure to be efficient/inefficient were (in descending order of “efficient” responses): mechanics (64/36%); owner–not operators (60/40%); master fishers (56/44%); deck hands (50/50%); and owner–operators (33/67%). The average, for the “efficient” response was therefore about 53%.

The roughly equal partition of the responses on this question was somewhat baffling, particularly with respect to the two owner categories. To help explain this, it is necessary to consider the results of the previous section in which it emerged that there was a difference of opinion between the interviewees from the small-scale fishery, in which there was a small number of owner–not operators, and those from the larger-scale fishery.

Figure 114 indicates the factors on which the interviewees in each crew category based their opinion on the level of efficiency/inefficiency of the market infrastructure. It may first be noted that no crew category considered that the proposed factor “rapid negotiation of the seller–buyer contract” was a relevant factor in determining the efficiency/inefficiency of the market infrastructure.



Among the owner–operators, who collectively made a predominantly critical evaluation, the relative efficiency of the market infrastructure was to be attributed (60%) to the presence of big traders, otherwise, for this group of owners, all other motivations were marginal (all <20%).

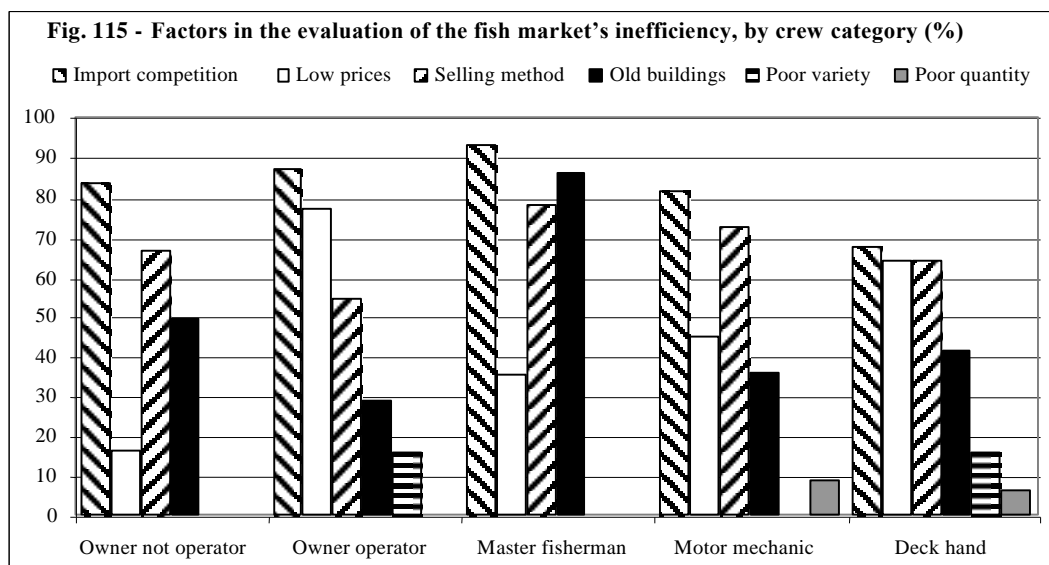
For the owner–not operators, their opinion on the efficiency of the market was based essentially on three factors: the presence of big traders (67%) and of import–export traders (67%); and the existence of cold-storage services (56%) for freezing and storing the fish brought to market.

The master fishers and the motor mechanics gave comparatively great importance to the presence of the big traders (56% and 43%, respectively) but lesser importance to cold-storage services (38% and 26%), the presence of import–export traders (27% and 21%) and hygiene (also 27% and 21%). Moreover, only these two crew categories considered (~6%) good prices to be a relevant factor in the market’s efficiency. For the master fishers in particular, the supply of equipment spare parts and/or replacements was of some importance (27%). Even the deck hands attributed (52%) a significant importance to the presence of big traders

in the market workers and a lesser importance to the availability of cold-storage services (21%) and to the presence of import–export traders (18%).

The two owner categories gave “Do not know” responses (11% for the owner–not operators and 20% for the owner–operators); and, for the master fishers, 6%. Finally it should be underlined that a fraction of interviewees could not give a precise reason for market efficiency.

Figure 115 shows the factors considered to be important in defining the interviewees’ assessment of the “inefficiency” of the market infrastructure.



The owner – not operators gave a clear scale of priorities among the proposed factors leading to market inefficiency: competition from imported products (84%); the existing (inefficient) selling methods (67%); and old buildings (50%). For this crew category, low prices were not an important factor.

For the owner – operators the three main reasons for market inefficiency were: competition from imported products (87%); low prices (78%, in marked contrast to the owner–not operators); the existing (inefficient) selling methods (55%); old buildings (29%); and, in contrast to the owner – not operators, the low variety of fish on sale (16%).

The master fishers assigned the greatest importance to competition from imports (93%), to old buildings (86%), to the existing (inefficient) selling methods (78%); old buildings (29%), but only 36% to low fish prices.

The mechanics broadly share the view of the master fishers: competition from imports (82%); the existing (inefficient) selling methods (73%); low fish prices (45%); old buildings (36%). However, in addition, the mechanics considered (9%) low quantity of fish on sale to be a minor factor.

The deck hands tended to agree with the owner – operators in their evaluation of the factors of market inefficiency, though at a generally lower level: competition from imported products (68%); low prices (65%); the existing (inefficient) selling methods (also 65%); old buildings (41%); the low variety of fish on sale (16%): and, in contrast to the owner – operators, the low quantity of fish on sale (7%).

4.4.3.6 Strength and weakness factors of maritime districts

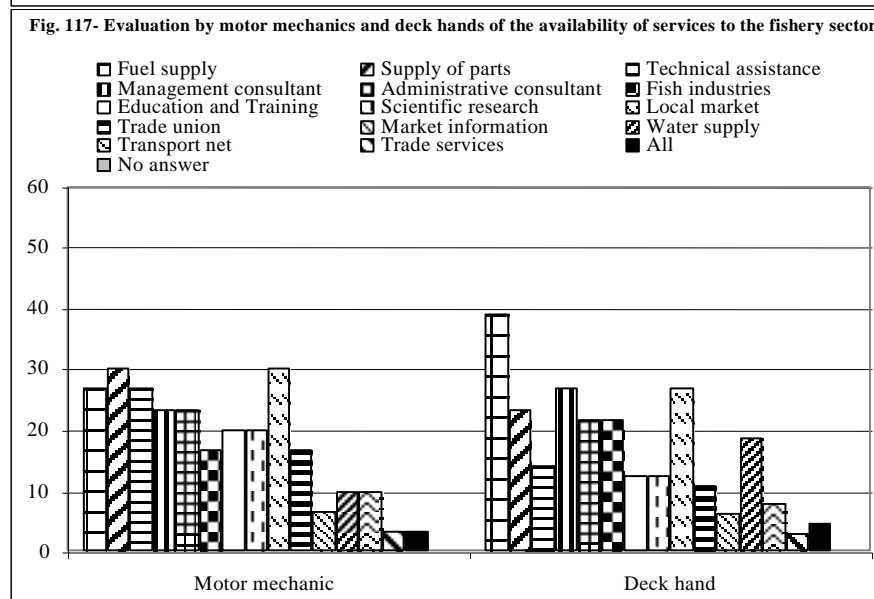
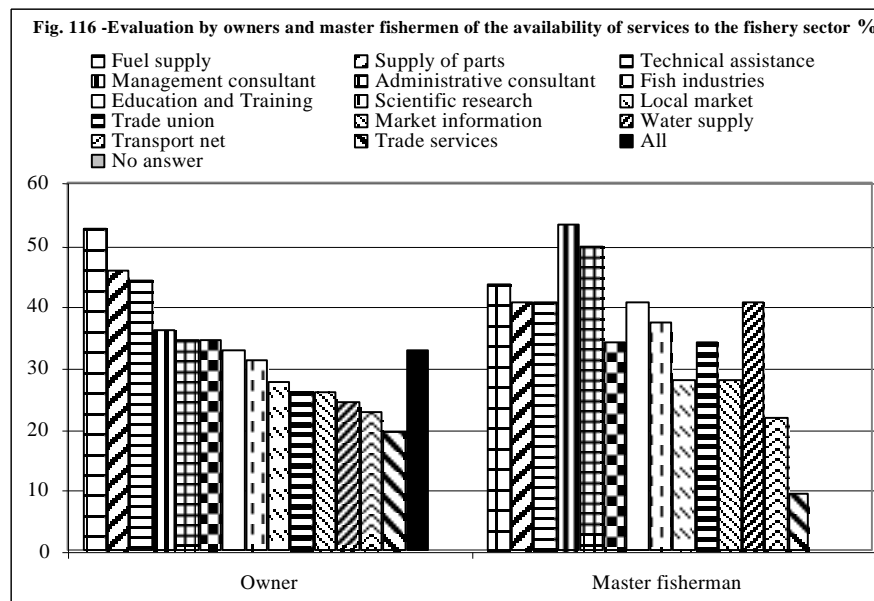
After having examined the fishers’ perception of efficiency/inefficiency of the market infrastructure, the following analysis takes into consideration the more extensive environment of the maritime district, with particular attention to the availability of relevant services, the main economic problems, and the other factors determining the fishery sector’s strengths and weaknesses.

Concerning the availability/unavailability of services relevant to the fishery sector, Table 16 give the qualitative rating by crew category refer to Figures 116 and 117 for the corresponding percentages.

	Owner	Master fisher	Motor mechanic	Deck hand
Fuel supply	*****	*****	***	*****
Spare parts supply	*****	*****	***	***
Technical assistance	*****	*****	***	**
Management consultant	****	*****	***	***
Administrative consultant	****	*****	***	***
Fish-processing industries	****	****	**	***
Education and training	****	*****	**	**
Scientific research	****	****	**	**
Local fish market	***	***	***	***
Trade union	***	****	**	**
Market information	***	***	*	*
Water supply	***	*****	*	***
Transport network	***	***	*	*
Trade services	***	**	*	*
All	****		*	*
No answer		***	*****	*****

Perhaps the first point to note greater frequency of “No answer” responses by the mechanics and the deck hands, followed by the master fishers, whereas the owners did not have such a response. Conversely, for the “all are lacking/strategic/insufficient” responses, the owners gave a high rating, while the mechanics and deck hands gave a low rating.

Overall, the owners and master fishers gave definitely higher ratings to the service items addressed than did the mechanics and the deck hands.



The owners ranked the services in decreasing order of availability in the respective maritime districts as follows: 1 – fuel supply (53%, highest); 2 – supply of spare parts; 3 – technical assistance; 4 – management consultants; 5 – administrative consultants; 6 – fish-processing industry; 7 – education and training; 8 – scientific research; 9 – local fish market; 10 – trade union; 11 – market information; 12 – water supply; 13 – transport network; 14 – trade services (20%); the percentage of “all the services” responses was 33% and there were no “no answer” responses.

They gave first priority to the lack of the services of a technical nature relating to vessel operation, since the financial burden of maintenance and technical assistance falls particularly on them. They attached a secondary importance to the lack of services useful to the fishing

companies, such as services of a managerial, legal or administrative nature, and to the services of an immaterial nature, such as education and training and scientific research. They gave lowest priority to the marketing aspects.

The results for the master fishers were quantitatively comparable, but the order of ranking differed somewhat: 1 – management consultants (54%, highest); 2 – administrative consultants; 3 – fuel supply; 4 – water supply; 5 – education and training; 6—spare parts supply; 7 – technical assistance; 8 – scientific research; 9 – trade union; 10 – fish-processing industry; 11 – local fish market; 12 – market information; 13 – transport network; 14 – trade services (9%, lowest).

The master fishers gave first priority to the availability of management consultancy services. Their second level of priority concerned the services of a technical nature relating to the vessel and to the training of fishers. Like the owners, they gave lowest priority to the marketing aspects.

For the mechanics, the order was: 1 – local market (30%, highest); 2 – parts supply; 3 – technical assistance; 4 – fuel supply; 5 – management consultants; 6 – administrative consultants; 7 – education and training; 8 – scientific research; 9 – trade union; 10 – fish-processing industry; 11 – water supply; 12 – transport network; 13 – market information; 14 – trade services (20%, lowest); the percentage of “all the services” responses was 4% and there were no “no answer” responses.

For the deck hands, the order was: 1 – fuel supply (30%, highest); 2 – local market; 3 – management consultants, 4 – spare parts supply; 5 – administrative consultants; 6 – fish-processing industry; 7 – water supply; 8 – technical assistance; 9 – education and training; 10 – scientific research; 11 – trade union; 12 – transport network; 13 – market information; 14 – trade services (20%, lowest); the percentage of “all the services” responses was 4% and there were no “no answer” responses.

It may be noted that, overall, the ranking of the mechanics was closest to that of the owners. And the master fishers, mechanics and the deck hands generally agreed on the factors given a low priority by the owner (factors 10 to 14 in the owners’ ranking), except that the master fishers and the deck hands gave “water supply” clearly higher importance. Regarding the first five factors, in terms of the owners’ ranking, the ranking by the master fishers was appreciably different, whereas that of the deck hands differed significantly only in respect of “technical assistance”. And for the intermediate ranking, it was surprising to find the high ranking given to the availability of a local fish market by the mechanics and the deck hands.

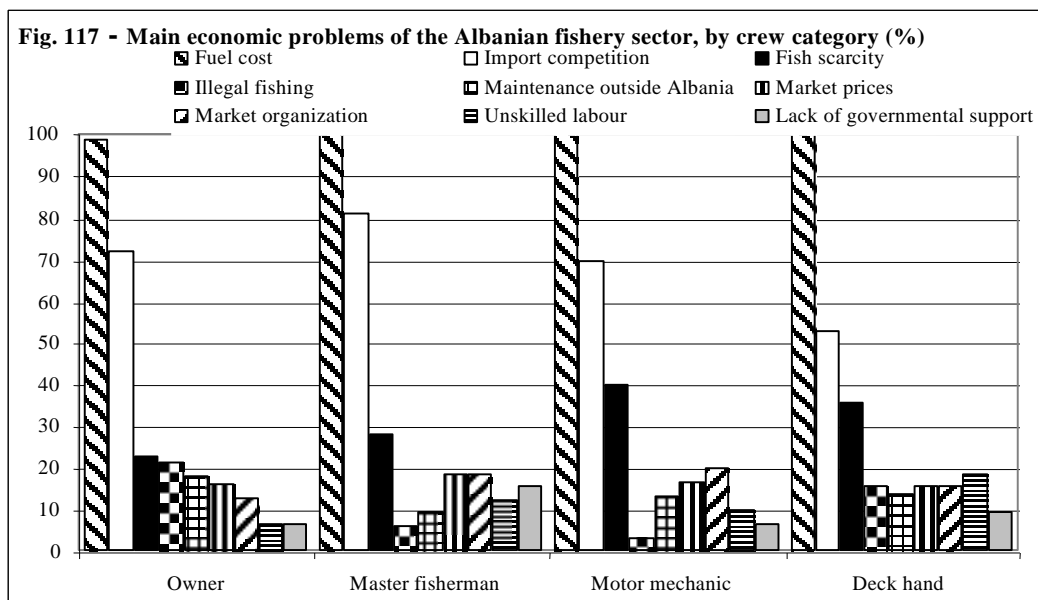
From the examination of the responses to the question (Figure 117), it emerged that the Albanian fishery sector suffers from two principal problems, in comparison to which the other aspects are of much lesser importance.

The first is the fuel supply, and, in particular, the high cost of fuel. All the crew categories almost all to the same degree considered this to be the first economic problem, both locally (in their own maritime district) and nationally.

The second is the competition from imported fish products, in the opinion of more than 70% of the owners, the master fisher and the motor mechanics, and, to a lesser degree, by the deck hands.

The owners gave a lower priority (around 20% of the respective samples) to a group of factors relating to the scarcity of the fish, the market price of the fish and illegal fishing; and they gave the lowest priority to the remaining factors. Like the owners, the master fishers also gave the scarcity of the fish and the market prices a lower priority, particularly as far as the economic consequences of illegal fishing were concerned. For the motor mechanics and the deck hands, the problem of the scarcity of the fish resources was, in contrast given a higher priority (37% on average).

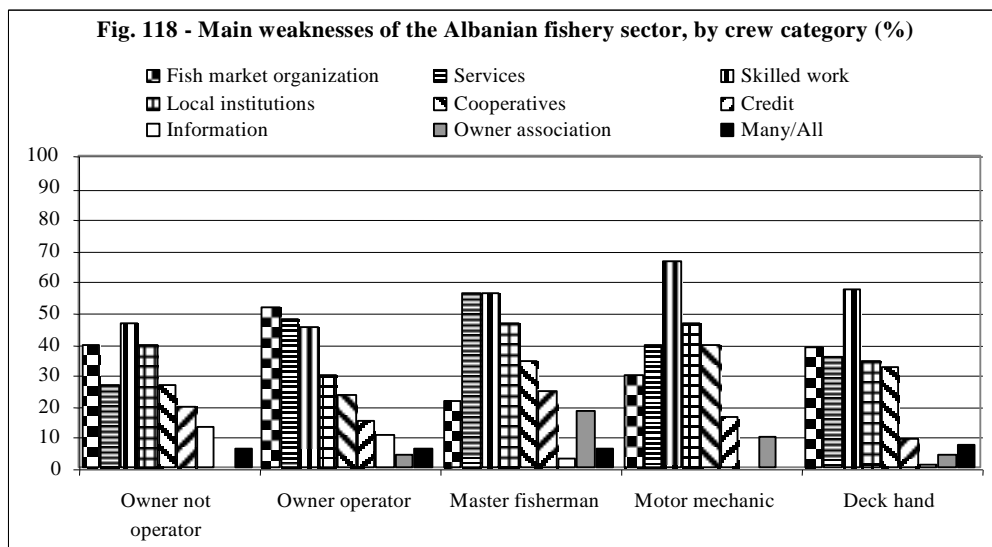
Unlike the owners, the remaining crew categories manifested a certain attention to other aspect, such as the organization of the fish market and the low qualification of the labour force.



The examination of the strengths and weaknesses of the fishery sector as seen by the four main crew categories proved to be quite complex.

Taking the weaknesses first (Figure 118), the lack of skilled labour was the problem felt most acutely by all the crew categories, especially by the motor mechanics and the deck hands²⁹, who were obviously more directly affected by such a lack than were the other crew categories.

²⁹ For these two categories this problem was stated by 60% of the interviewees, overall, and well ahead of the second main weakness—the inadequacy of the local institutions, for the motor mechanics, and the poor organization of the fish market, for the deck hands—at a frequency of about 20%.



The owner–operators, considered the problem of the lack of relevant services and the poor fish market organization to be less important weaknesses than the low specialization of the labour force. By contrast, the owner–not operators gave priority ranking to the lack of skilled labour, followed by the organization of the fish market and the role of the local institutions.

The local system of cooperatives is a weakness that the master fishers, mechanics and deck hands considered more important than did the owners. Also, the owners gave more importance to availability of information than did the other crew categories, though only at the level of least priority.

Regarding the strengths of the fishery sector, the comparison was simpler than it was for the weaknesses. Essentially, there are four aspects; the first three were related to cooperation among the crew categories and the fourth, to the availability of information. For the first three, the positions of the crew categories were very similar, whereas, for the topic of information was important above all for crew categories other than the owners. For the other strengths, there were some differences among the crew categories, but, nevertheless, they were marginal³⁰.

In conclusion, the attitude of the interviewees on the other Albanian maritime districts than their own, only the master fishers stated with a certain frequency (22%) that they were aware of differences between the districts.

For the owners, the predominant opinion was that there were no differences among the Albanian fishery districts, whereas, for the other crew categories, the “Do not know” response was predominant.

The percentages of the “Do not know” response were from 40% for the owner–not operators to more than 70% for the deck hands.

³⁰ For example, cooperation in the market and the presence of supervisory bodies; all the crew categories note them, with only small differences in frequency.

With regard to the nature of the present relations among the Albanian fishery districts, for all crew categories, a neutral evaluation, of more than 60%, was predominant. Indeed, only about 20% of the owner – not operators stressed the existence of competitive relations.

All the crew categories gave a significant number of “Do not know” responses, the highest percentage corresponding to the deck hands.

In summary, the responses to the two preceding questions indicated a certain parochialism vis-à-vis other external fishery entities. The owner–not operators were the most open to a relationship with an outside body, while the other crew categories appeared to be able to focus only on their respective local fishing community. Apart from whether or not such a separation among the Albanian fishery districts corresponded to the facts, it is significant that such separation was perceived by the fishers either directly – if the relations were considered to be neutral – or indirectly – if the fishers did not know the nature and organizational structure of the external bodies.

Although the predominant perception was that of exclusiveness of each Albanian fishery entity, inter-district relations were studied with a view to evaluating the nature and intensity of such relations, the interviewees were invited to specify as far as possible the precise objects of the inter-district relationships.

In general, all the crew categories identified shipbuilding and maintenance as the main bases for inter-district relationships. The owner–operators considered that there was little difference between the different factors thought to determine such relationships³¹. The responses of the non-owner crew categories with respect to the factors – shipbuilding facilities, information flow, sharing of fish resources – clearly showed a scale of priorities.

There is a significant percentage of uncertain answers, not only among the lower roles within the crew but also among the owners: in particular among owner/operators as deck hands about one fifth is not aware of the factors that create the interrelation between the Albania fishery districts. Furthermore, around 10% of the owner and the deck hand categories did not answer the question; and similarly, the motor mechanics.

In conclusion, the relationships among the Albanian fishery districts is predominantly determined by the factors affecting production, while those affecting the marketing of the catch ,are considered to be of secondary importance.

³¹ The owner–not operators and motor mechanics identified the vessels’ shipyard facilities and maintenance as the predominant factor in the inter-district relationship; the master fishers attached some importance to the flow of information, as well as shipyard facilities. The owner–not operators and the master fishers gave second place to the sharing of the fish resources and to fish market facilities. By contrast, the owner–operators gave the shipyard facilities, the flow of information and the sharing of the resources the same ranking. About 20% of the owner–operators and of the deck hands gave “Do not know” answers.

4.5 Wider knowledge: FAO and the AdriaMed Project

The last questions of the questionnaire were asked in order to verify the interviews' knowledge of FAO and AdriaMed Project. Table 17 shows the results for the entire sample.

Table 17. Knowledge of FAO and the AdriaMed Project

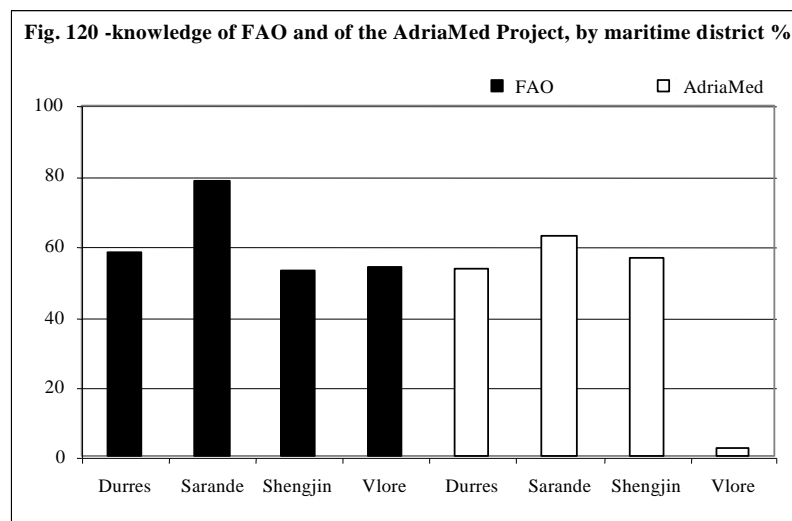
<i>Do you know about FAO?</i>	<i>Do you know about the AdriaMed project?</i>		TOTAL
	YES	NO	
YES	28.6	29.7	58.4
NO	5.9	35.7	41.6
TOTAL	34.6	65.4	100

On the whole, there was significant awareness of FAO and the AdriaMed Project: 58% of the interviewees knew of the existence of FAO and the 35%, that of AdriaMed; 29% knew about both; and 36% knew neither; 30% knew about FAO but not about AdriaMed, and 6%, vice-versa.

The positive responses were discriminated by the four Albanian maritime districts: the Sarande district interviewees were the best informed (79%) on FAO and AdriaMed (Figure 120).

As regards the FAO, there were no significant differences among the three other maritime districts (54% to 58%) and there was a good level of information among the local fishers (i.e. within each maritime district).

As regards the AdriaMed project Vlore seems to be an abnormal case: only 3% of the interviewees knew of its existence, while in the other maritime districts, the level of knowledge was significantly higher (54% to 63%).



When the responses to the two questions were pooled, there was a certain similarity between the maritime districts of Durres and Shengjin: 43% of the interviewees of these two maritime districts knew about FAO and about AdriaMed, while about 30% did not know about either (Table 18).

The interviewees of two of the maritime districts differed in their knowledge of either one or the other: 16% of those from the Durres district knew about FAO but not about AdriaMed, whereas about 14% of those from Shengjin knew about AdriaMed but not about FAO.

On the other hand, the other two maritime districts were highly specific in this respect. Those from the Sarande district were well informed (63%) about FAO and AdriaMed, while 21% did not know about either.

Table 18. Knowledge of FAO and the AdriaMed Project, by maritime district

Do you know about FAO?	Do you know about the AdriaMed project?							
	Durres		Sarande		Shengjin		Vlore	
	Yes	No	Yes	No	Yes	No	Yes	No
Yes	42.9	15.9	63.2	15.8	42.9	10.7	2.7	52.0
No	11.1	30.2	0	21.1	14.3	32.1	0	45.3

The Vlore case, as mentioned above, is particular. While only 3% of the interviewees knew about FAO and AdriaMed, 45% of them did not know about either; nevertheless, 52% did know about FAO but none knew about the AdriaMed project.

4.6 Correlation among observed phenomena and variables

Following the analysis commented above, a further statistical investigation was carried out in order to check the extent to which the responses to a selected group of questions in the questionnaire depended on three variables: the port where the interviewees worked, the size of the fishing vessel on which they work when at sea, and their role in the crew. Situations of dependence arise from the fact that the responses are affected by the personal situation of those interviewed; for example, the responses may be linked to the fact that the interviewees work in the same port and that the answer given to the question/modality is specific to their respective maritime district. Conversely, in situations of independence, the reference port, the size of the fishing vessel or the role played within the crew are not significant in influencing the answers; in other words, the phenomena investigated have a general importance and are not affected by the interviewee's specific situation as regards place, type of fishing and their occupational role.

The analysis was based on the assumption that the responses were independent³² the three variables stated above. Such assumption of independence between variables (invalid assumption defined with H0) was compared to the alternative assumption of dependence (defined with H1)³³.

Table 19 provides an overview of the questions, where appropriate, the response modalities proposed for which a dependence relationship with one or more variables was observed. The base port is the variable with the largest number of dependence relations, while the number for the other two variables – vessel size (hence type of fishing carried out) and the crew's role – is much lower and thus represents a much better result than expected. The role played by the crew is obviously linked to the issues/modalities related to the job of fisher and specifically to the individual sphere, while the vessel size and the type of fishing carried out have a stronger impact on matters concerning markets and local fishing entities.

An analysis of the observed dependence relationships follows; the sign of the relationship (positive or negative) between the responses to a given question and the expression of the three variables (i.e. four fishing ports, two vessel sizes, five crew categories) is given.

The need for knowledge other than the knowledge of fishing itself specifically required by a fisher is particularly linked to the base port and the role of the crew categories. The kind of dependence relationship observed with the port variable can be further specified for each specific maritime district: those interviewed in the Sarande and Vlore maritime districts frequently gave positive responses as to the need to have specific knowledge on biological aspects as well as on certain aspects of fishing techniques, whereas negative responses were more frequently observed in Durres and Shengjin. The responses to the same question were influenced by the interviewee's crew category: unlike the other three crew categories, the fishing vessel skippers and the master fishers were much more inclined to believe that knowledge linked to fishing techniques was important for the fisher's job; moreover, they also had a higher percentage of "Do not know" responses; conversely, they saw little need for notions of marine biology.

No dependence between professional knowledge and fishing vessel size was observed.

Among the dependence relations observed, it emerges that the answers given to The responses to the question on whether or not a fisher had worked in a maritime district other than his own were linked to three variables. Specifically, fishers currently working in the ports of Durres and Shengjin had more frequently worked in another maritime district;

³² Independence between two variables occurs when the profiles of conditioned distributions are the same for relative frequencies or proportional for absolute frequencies. If there is independence, the double distribution does not contain more information than that contained in the two separate distributions. The most widely used dependence index is the chi-squared index, based on the difference between the observed values and the expected (theoretical) values. The relevant statistical computations were carried out using Spss software.

³³ 0.05 was set as significance level, i.e. the 5% likelihood of rejecting the assumption of independence when in fact the said assumption turns out to be true. When the significance level between analysed pairs of variables is less than 0.05, the probability of rejecting the invalid assumption when the latter is true is lower, therefore the independence assumption applies as variables depend one on the other. The analysis of residuals, i.e. differences between actual and theoretical independence values, helps determine the response modalities that attract themselves (positive residuals) and those that reject themselves (negative residuals).

conversely, a greater number of fishers in the Sarande and Vlore districts had not worked in another maritime district. As for dependence on the role in the crew, the fishing vessel skippers and mechanics had had more experience in other maritime districts.

It emerged that those working on large vessels were the ones who had most worked as fishers in maritime districts other than their current district of work.

The reasons that had led the interviewees to find a job in the fishery sector were linked to their respective base ports, but were not linked to their current crew role or the extent of the fishing activity carried out. Specifically, only two response modalities showed a dependence relationship with the port variable: the lack of other job opportunities; and the need for income. The lack of other job opportunities was especially felt by the interviewees from Durres, while the need for income was the initial motivation to start looking for a job as a fisher for those interviewed in Vlore and Shengjin. The base port played no significant role in this context; rather, it was for family reasons and for the love fishing.

Nor did the search for a job other than the present one depend on the fishing port; furthermore, and contrary to expectations, the crew category did not apparently influence the search for other jobs in the past. A dependence relationship with the vessel was observed: those working on small fishing boats had tried looking for a different job than the one they had, to a much greater extent than fishers working on large fishing vessels.

Although the fishing port did not have a significant impact on the active search for a job different from that as a fisher, the local environment did play a significant role in offering work experience outside the fishery sector: Durres and Shengjin maritime districts had higher concentrations of people with other employment opportunities.

The responses to the question on future working prospects provided a clear outlook on the fisher's base port and the amount of fishing, the latter being the variable on which the responses depend. As for the port of operation, Sarande registered the highest number of opportunities to change job; Vlore is characterized by continuity in the sector, whereas Durres and Shengjin registered the largest number of "Do not know" responses. It is the small-scale fishers who normally highlighted the possibility of abandoning the sector; this confirms the deep dissatisfaction already expressed by the small-scale fishing sector in the search for a different job.

Also, the reasons given for remaining in the sector were linked to the fishers' base port: the lack of better working opportunities was the most frequent motivation for Shengjin's fishers; love of fishing and the level of income were apparently the reasons for Vlore's fishers remaining in the sector; and finally, the lack of employment alternatives was the main reason indicated by those interviewed in Durres for not leaving their present job. The continuation of family tradition was not a reason depending on the fishers' base port.

The general framework of results described above was confirmed by the question on the reasons why one should continue working as a fisher: in Vlore, the number of those who believed that income was a major reason was particularly high, while the fear of being unemployed was the prevailing reason given in the other maritime districts. As for the

prospect of remaining unemployed, a dependence relation can be observed with the interviewed person's crew category: as expected, the problem was more frequently felt by the interviewees – i.e. deck hands – with lower qualifications. Finally, in this case too, no dependence relationship with family tradition was observed.

All the foregoing considerations on the motivational aspects and the degree of satisfaction/dissatisfaction with one's job was furthermore supported by the opinion expressed as to whether the interviewees should suggest to others that they take a job as a fisher. As for the port variable, a greater tendency to do so was observed among those interviewed in Vlore and, to a lesser extent, in Shengjin; as for vessel size, those working on large fishing vessels were very much inclined to make the suggestion to others.

The assessment on the economic situation of one's fishing district obviously depends on the base port, but also on the crew category of the interviewee. In spite of the expectations based on previous results, fishers in Vlore showed a higher percentage of people expressing very negative opinions; more favourable assessments were made by fishers in Durres and Sarande, while a substantial proportion of the fishers in Shengjin gave "Do not know" responses.

As for dependence on the interviewee's role in the crew, it should be noted that the worst assessments were made mainly by the owner-not operators, while more moderate assessments were made by the other crew categories and "Do not know" responses were much more frequent among deck hands.

The identification of the sector's main problems was principally linked to the local fishing reality in Vlore and, to a lesser extent, in Sarande, where the problem of the scarcity of fish resources was particularly felt, while market problems were particularly felt in Durres; finally, it was especially the fishers in the Durres maritime district who considered that governmental measures were among the decisive causes of the sector's problems.

The indication of the sector's problems also depended on the interviewee's crew category with reference to the fishery sector's policy: unlike other crew categories, only the owners and skippers believed that the policies were a problem for the sector.

The assessment of the effectiveness of the local market revealed two opposite dependence relationships: those working in Shengjin and Vlore tended especially to express a positive opinion, while those working in Durres and Sarande tended to give negative opinions.

Small-scale fishers were the most critical on this aspect, essentially because of the low quotations; conversely, many more fishers working on large fishing vessels believed that the local fish market was efficient, and yet they also complained about the old facilities.

As regards the sector's specific economic problems, the following picture emerged with reference to the dependence on the base port. The problem posed by competition from imports was most strongly felt by the interviewees in Sarande and Shengjin. Insufficient governmental support was lamented in Shengjin; also in Shengjin, but especially in Vlore, a scarcity of fish resources was lamented. Only in Durres did the interviewees complain about

the organization of the market channels and the lack of skilled workers. And finally, but only in Sarande, the existence of problems linked to illegal fishing was observed. The competition posed by imported products was signalled especially by fishing vessel owners and skippers. The economic damage caused by illegal fishing was most widely felt among those working in the small-scale fishing sector.

The weaknesses registered for each port highlighted the following dependence relationships: the lack of services was significantly felt in all maritime districts except Durres; in Durres, weaknesses were registered with reference to the role played by cooperatives and to the organization of fish markets. In the two bigger maritime districts, especially Durres, fishers complained about the lack of a skilled work force; in Shengjin, a problem of credit availability was lamented; and finally, in Vlore, the main problem referred to the weakness of local fishery institutions.

The unavailability of a skilled work force was a weakness particularly deplored by those working on large fishing vessels. This finding does not contrast with previous statements on the lack of dependence relationships between type of fishing and knowledge necessary for fishing. The need to acquire additional knowledge on fishing techniques was not seen to depend on the type of fishing; this need is widely felt both by small-scale fishers and by fishers working on large vessels. Yet the latter is the sector where the lack of a highly qualified work force was more widely felt.

Market organization is a weakness with a dependence relationship not only with the maritime district, but also with the interviewee's crew category and the fishing vessel size: this weakness was especially felt by the vessel owners, with reference to the crew category, vessel size and amount of fishing.

Two major considerations should be added at the end of the analysis of the dependence relationships between observed phenomena and stratification variables.

The first consideration attempts to highlight the lack of dependence relationships for some phenomena. Together with the situations stressed here above, there are others for which no such relationship between the question posed and any of the three variables emerges. Such is the case of the question on whether the job as a fisher was or was not the main working activity carried out: the absence of any kind of dependence relationship with the three variables suggested that the responses (YES 68%, NO 32%) expressed a common phenomenon, which is not influenced by the fact of belonging to specific groups—maritime district, vessel size, crew category. The same applies to the question on whether the interviewee was doing the same job as his father: no dependence relationship with the three variables was observed and the answers given (NO 70%, YES 30%) showed a situation that is transverse to all possible situations for the fisher with reference to base port, type of fishing and crew category. This independence emerged not only from the question on the father's job, but also whenever the response included "family tradition" as an alternative. This is an aspect that did not emerge very frequently in any of the situations in which it was investigated, and furthermore did not appear to be linked in any way with the crew category of the interviewee, nor to the type of fishing, nor to the base port.

A second remark refers to the importance of the three variables—base port, crew category, vessel size—in outlining dependence relationships with the socio-economic phenomena emerging from direct investigation. Such numerous and intense relations highlighted the relevance of the port for the interviewees, but also showed the importance that the crew category and the vessel size can have in the analysis of certain phenomena. This consideration supported the choices made at the beginning in the selection of the survey sample, which was stratified on the basis of the three basic variables.

Table 19. Interdependence (X) between questions/modalities and variables

QUESTIONS/MODALITIES	VARIABLES		
	Port	Size	Role
Additional knowledge other than fishing techniques necessary for a young fisher			
Biological sciences	X		
Technology and equipment	X		X
None/Do not know	X		X
Job held in another maritime district	X	X	X
Motivation when starting the job			
Lack of other opportunities	X		
Family tradition			
Love of fishing			
To earn more	X		
Search for a different job in the past		X	
Other job opportunities	X		
Prospect of changing job in the very near future	X	X	
If no/Do not know, why?			
There are no better opportunities	X		
Love of fishing	X		
To earn more	X		
Family tradition			
Main reasons for doing the job			
Do not know	X		
To earn money	X		
To avoid unemployment	X		X
To carry on tradition			
Fishers' current situation in their own maritime district	X		X
Sector's problems			
Shortage of fish resources	X		
Poor organization of fish market	X		
Inappropriate fishery policy	X		X
Recommend one's own job to others	X	X	
Most important aspects of trading			

Trust between sellers and buyers	X		
Prompt payments	X		
Quantity of money involved	X		
Continuity in the seller–buyer relationship		X	X
Amounts earned	X	X	X
Efficiency of the local fish market	X	X	
If satisfactory, why?			
Presence of big buyers	X		
Presence of import/export dealers	X		
Cold-storage facilities	X		
If not satisfactory, what are the main problems?			
Low prices for fish	X	X	
Method of sale	X		
Obsolete facilities	X	X	
Competition from imported fish products			
The main economic problems of fisheries in the country			
Competition from imports	X		X
Lack of governmental support	X		
Scarcity of fish	X		
Poor organization of the fish market and transport network	X		
Poor market prices for fish			
Unskilled work force	X		
Illegal fishing	X	X	
The main weaknesses of one’s own maritime district			
Insufficient services	X		
Lack of fishers’ cooperatives	X		
Shortage of skilled workers	X	X	
High level of reliability	X		
Insufficient support by local institutions	X		
Poor organization of the fish market	X	X	X
The difference between one's own maritime district and the others	X		X

5. Socio-economic aspects of Albanian maritime districts: main results

The aim of the following pages is to outline a picture of the single Albanian maritime districts, thereby identifying among the registered phenomena the ones that specifically qualify each fishing port. Annex III provides some summary data on how the Albanian sample is structured in each fishing port.

5.1.1 Durres

Durres is, together with Vlore, one of the two biggest Albanian maritime districts and is represented in the sample by 63 fishers, distributed among the various professional roles investigated.

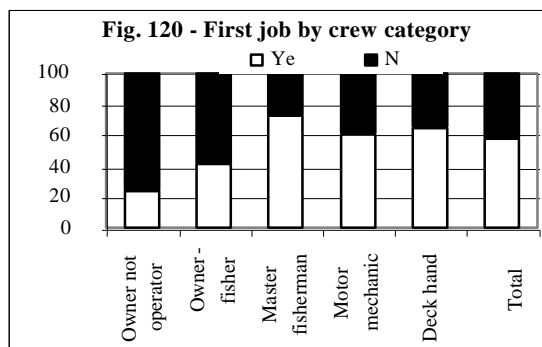
A first aspect related to the profile of the interviewed people making up the fishing sector's reality in Durres refers to the training level of local fishers. The situation in the Durres maritime district does not differ significantly from the entire Albanian sample and is mainly characterized by primary education. Primary education is the level of education most widely achieved among sailors (70% of the group). Answers show, however, that training in this maritime district weighs less than in the entire country: in Durres, 49% of the interviewed people has concluded primary education, while 44% has a secondary education certificate; national data show that 55% of those interviewed had concluded primary education and 43% secondary education.

The maritime district shows quite a high variability in the number of fishers making up the crews. This aspect characterizes specifically the Durres maritime district in comparison to the entire Albanian sample: as a matter of fact, 60% of the interviewed people in the marine district talks about variability in the number of people making up the crew, the corresponding percentage for the entire sample are 26%.

The Durres maritime district also stands out for the high level of mobility of fishers, who carried out a similar job in another fishing district: around 80% of local fishers had a working experience in the sector in another maritime district. No big differences are registered between the various roles: those without working experience elsewhere are found only among ship-owners and sailors, yet the percentage of them is quite low (12%).

The sector of local maritime fisheries is often found among those approached by people when entering the work world (Figure 1): 58% of fishers in Durres started working as a fisher as their first job ever; however, this percentage is lower than the corresponding percentage for the entire Albanian sample, where 69% of the interviewed worked as a fishers as their first job when entering the work market.

Significant differences can be found between the various professional roles when comparing employers and employees' professional roles: the phenomenon described above is namely much less relevant (37%) among employers, and this unlike the other roles, where over 60% of the interviewed people started working as a fisher as their first job.



On the whole, this situation is not apparently linked to the legacy of a paternal tradition. Intergenerational continuity in the sector concerned only 21% of professionals in Durres, as against the 30% registered on the total Albanian sample (Table 20).

Table 20 Introduction into the sector and father’s working tradition

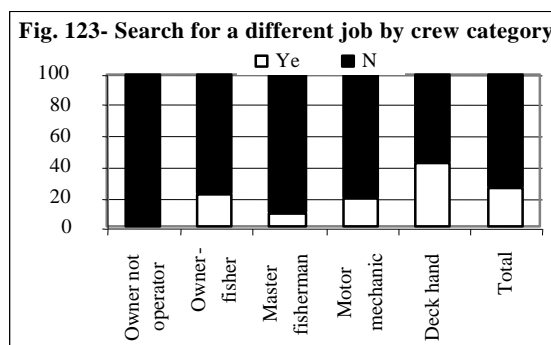
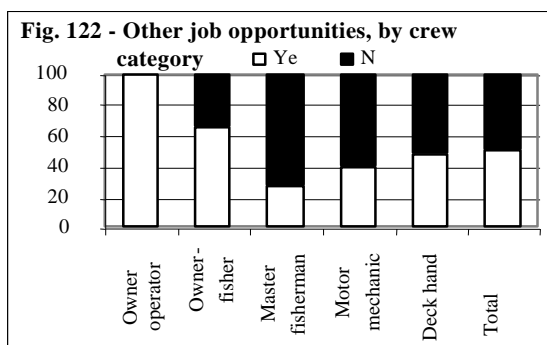
First job	Same job as father					
	Durres			Albania		
	Yes	No	Total	Yes	No	Total
Yes	18%	40%	58%	27%	41%	69%
No	3%	39%	42%	3%	29%	31%
Total	21%	79%	100%	30%	70%	100,0%

The structuring of answers by professional role highlights a higher prevalence of cases of intergenerational continuity among fishing vessel skippers and sailors in comparison to the other roles; no cases of continuity of the family tradition are registered among vessel owners/entrepreneurs.

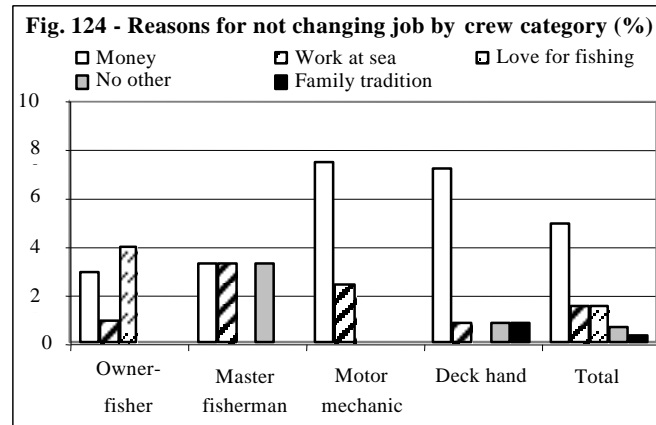
Although in almost all cases of intergenerational transfer the interviewed people started working as a fisher as their first job (18% out of a total of 21%), 40% of the interviewed started working in the fisheries sector as their first job without having their father doing the same job. In comparison with national percentages, it can be observed that the ratio between first job done and father’s job is higher inside the sample (27%) than in Durres (18%).

Almost half of the interviewed people in the maritime district had other working opportunities in the past (Figure 2). Specifically, this applies especially for the two categories of fishing vessel owners, while fishers in the crew and especially skippers had more modest job opportunities.

Only one fourth of the interviewed people have looked for a job in a sector other than fisheries, with sailors being the most active jobseekers (Figure 123). No strong link seems to emerge between other working opportunities and the search for a different job: as a matter of fact, a very low percentage of individuals looking for jobs in different working sectors are registered both among those who had more job opportunities, namely fishing vessel owners, and those who didn’t, namely fishing vessel skippers and engineers.



For those who did not have other job opportunities, it is particularly interesting to examine the reasons leading them to abandon the fishing sector (Figure 124): in over half of the cases the wage level obtained was the main reason to keep on working in the sector. Other motivations weigh to a much lesser extent (17% of the individuals): the income criterion was followed by the pleasure to work at sea and the passion for fishing.

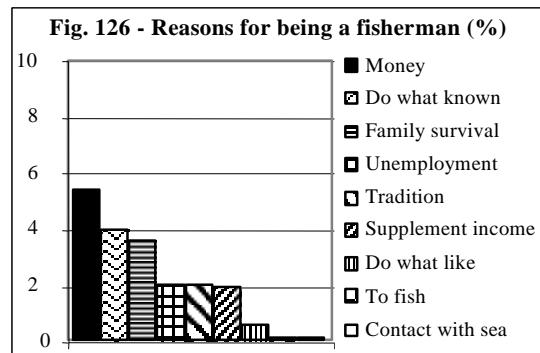
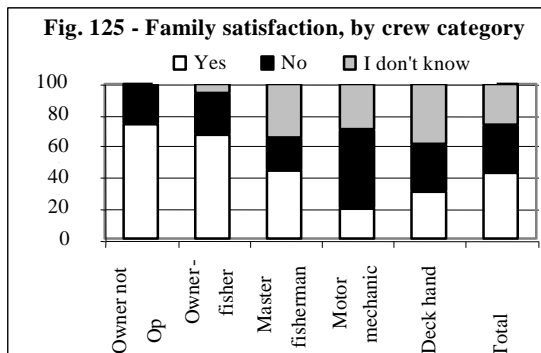


In trying to avoid that the sector is abandoned by those who had other job opportunities outside the sector, only a very marginal role is played both by the lack of different professional qualifications (7%), and the existence of a family tradition in the sector (3%). The analysis of the answers to this question on the basis of the different professional roles of crew members shows how the wage motivation is especially felt by minor roles, notably engineers and sailors, while the lack of different working skills plays a role almost exclusively for fishing vessel skippers, maybe due to the specific tasks carried out by the latter. Some perplexity may be caused by the fact that passion for fishing is not a relevant motivation for minor roles within the crew (from skippers to sailors), while it is one of the reasons given by owners. This perplexity could be cleared with the assumption that the categories employed are much more sensitive than their employers to the wage motivation rather than to the pleasure for fishing. The importance attributed to wages, especially by the crew's minor professional roles, cannot however be interpreted *a priori* in the sense that the fishing sector offers high wages for the work done; yet the sector guarantees fishers a relatively satisfying level of income in comparison to job alternatives that are worse or even non existing in the local reality.

The fishing sector's professionals in the maritime district do not show any prospects of changing their job: only 3% of them thinks that this scenario is possible, an additional 17% is uncertain, while about 80% excludes the hypothesis that they will change their job in the future. The few individuals who think about changing job are to be found only among fishing vessel owners, while the employees making up the crews have given uncertain answers.

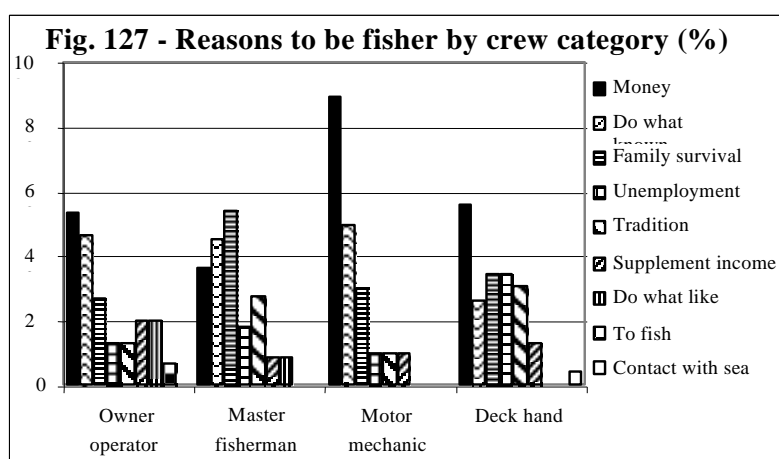
As for the family satisfaction rate for the fisher job (Figure 125), 43% of the interviewed people give a positive answer; the rest of the sample is split between those who believe that their families are not satisfied with the job (30%) and those who do not have a precise idea on the matter (27%). The family satisfaction rate gradually decreases and the percentage of uncertain situations increases when passing from the roles of fishing vessel owners to the roles of employed fishers. Fishing vessel engineers show the highest percentage of negative answers on the matter.

The final part of the survey on the profile of fishing professionals and working conditions in Durres maritime district concerned the request to the interviewed people to identify the positive aspects of their activity. Local fishing professionals indicate reasons in favour of the job as a fisher (Figure 126), which are ordered differently than the entire Albanian sample. Motivations like income, tradition continuity and passion for the catch activity play a less important role.



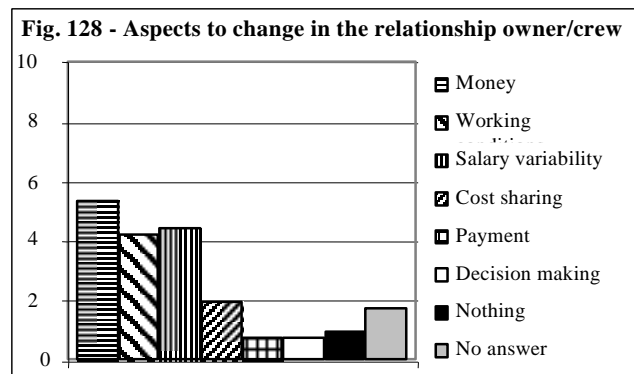
Conversely, aspects like job knowledge, as well as the need to guarantee for family survival and sustain the level of incomes are much more important. In spite of the minor role played by the wage level at the level of the maritime district in comparison to the entire Albanian sample, the wage level however remains the most important reason, being felt especially among fishing vessel engineers and to a lesser extent among skippers (Figure 127). For the latter, the need to support their families and enhance the acquired professional skills is more important than the economic reason. It should be noted, finally, that the fear of being unemployed is not on average an important reason to carry on with one's job: the largest percentage (35%) is registered among sailors, who are undoubtedly the crew's weakest and less qualified professional category.

Among the phenomena observed with reference to the relations between crews and fishing strategies, great attention was paid on the quality of the relations between crew members and the insurance protection of their work.



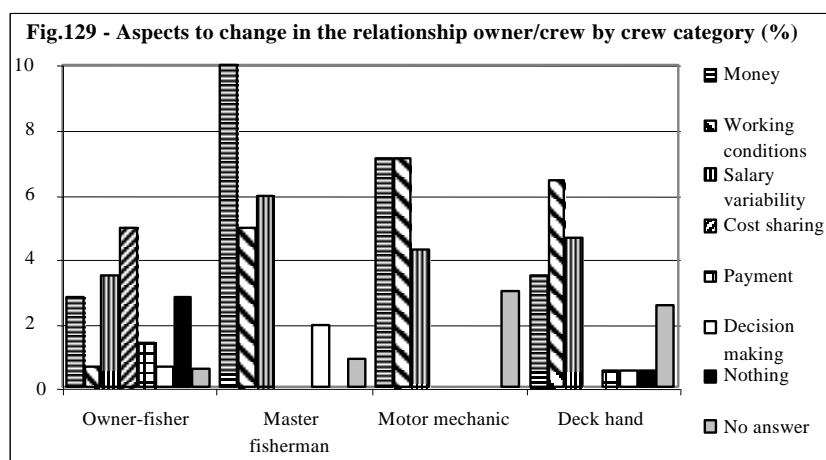
In order to evaluate the quality of the relations between fishing vessel owner and crew, the interviewed people were asked to indicate the aspects that they deemed unsatisfactory and thus wanted to change (Figure 128). It emerges from the survey carried out in the maritime

district that pay and working conditions are the two aspects that most of the people interviewed wish to change. In this respect the Durres maritime district did not differ greatly from the country as a whole.



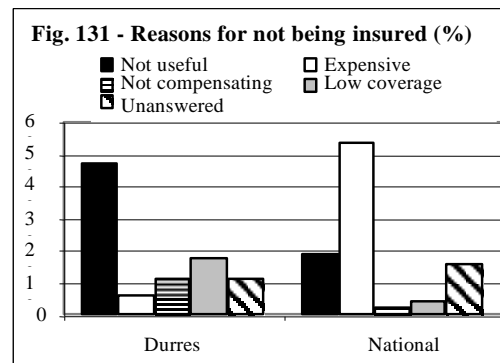
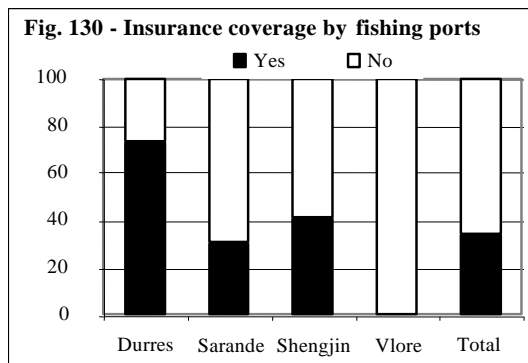
A different level of dissatisfaction was registered for those interviewed in Durres with reference to some specific aspects: in particular, a major importance was attributed to both aspects linked to pay, namely the way in which revenues are distributed and wage variability; the dissatisfaction shown by the local maritime district's professionals on aspects like cost distribution and payment modalities was, on the other hand, less significant in comparison to the corresponding results for the entire Albanian sample.

Similarities and differences between the local and overall situation emerge when distinguishing between the various professional roles (Figure 129). Wage variability is an issue of interest for all professional roles in the maritime district, and this to a much greater extent than for the entire sample. Conversely, almost all professional roles interviewed in Durres show lower percentages than the entire Albanian sample with reference to the question on the aspects that should be changed. As for the issue of cost distribution and payment modalities, a distinction has to be made between fishing vessel owners in Durres and the group of owners interviewed within the entire Albanian sample, with the former attributing more importance to said topics than the latter. Again in comparison with the national corresponding professional groups, the need to modify the way in which revenues are distributed is felt by all categories in Durres, with the exception of sailors.



Finally, the answers given by the various professional roles in the Durres maritime district as regards working conditions differ from the ones provided by the corresponding national groups for the categories of fishing vessel skippers (who are in Durres less concerned by the issue in comparison to the whole of Albania) and engineers, who complain about this issue much more than the corresponding category in the total sample.

The Durres maritime district registers the widest diffusion of insurance policies for work risk coverage (Figure 130). Although limited in number, those who do not have insurance coverage give different reasons than the interviewed people in the other maritime districts to motivate their choice (Figure 131).



Unlike the overall, national picture, the main reason is the not the high cost of the insurance policy, but rather the negative judgement on the usefulness of insurance coverage. The low level of coverage and the partial compensation for damages are further reasons, for which no recourse is made to insurance schemes; these reasons are more widely felt in Durres than in the entire sample.

Durres' situation appears to be less critical (Figure 132) if compared to the quite negative overall picture outlined by Albanian fisheries professionals as for the economic situation of the sector: Among the maritime district's fishers³⁴ fairly good assessments (44%) prevail over totally negative ones (35%). In the maritime district, as at a national level, the most critical viewpoint is expressed by fishing vessel owners, while the largest number of uncertain answers comes from sailors.

In spite of the situation of minor difficulty observed in the Durres maritime district, local fishing professionals are less inclined to suggest others that they start a job as a fisher (40%) in comparison to the national sample (50%). The analysis of the answers given on the basis of the interviewed people's professional role (Figure 133) shows that the most critical opinions on the matter are expressed by crew members; this attitude is common to the entire Albanian sample, but it is even more evident in the case of the Durres maritime district³⁵.

³⁴ Within the entire sample, the percentage of negative assessments is much higher (62%) in comparison to the fairly good ones (22%) or to uncertain answers (16%).

³⁵ As a matter of fact, for the three subordinate professional groups the difference between those who recommend others to start a job as a fishers in the entire Albanian sample and in the Durres subgroup is on average 20% less than the maritime district being considered. As for fishing vessel owners, it should be observed that the percentage of positive answers registered in Durres is much higher than the corresponding percentage for the entire professional group: in particular, 60% of owners-fishers of the maritime district and 43% of the national sample believes that starting a job as a fisher should be recommended to others.

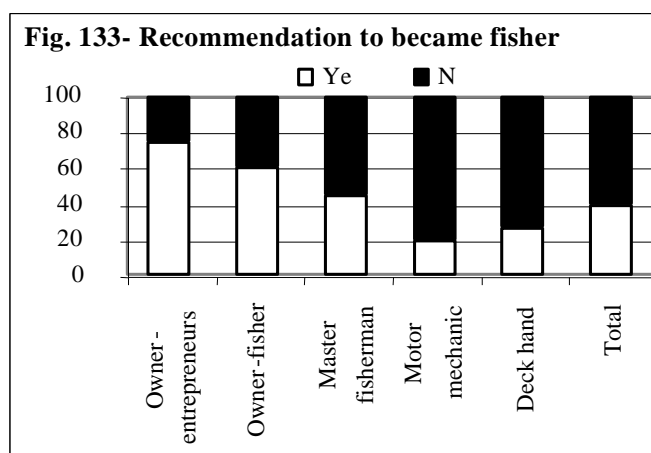
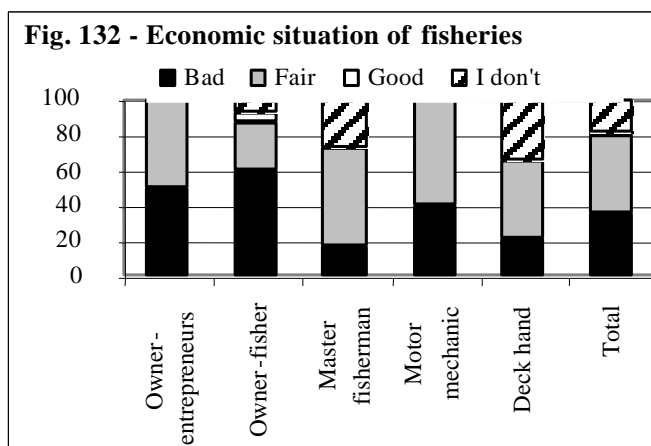
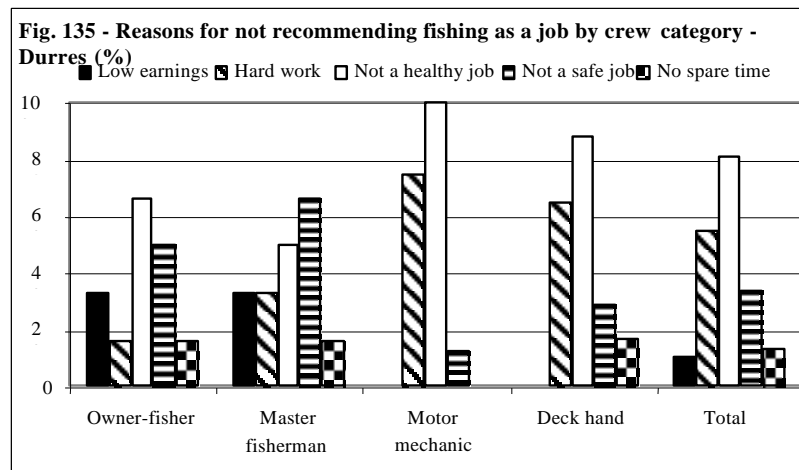
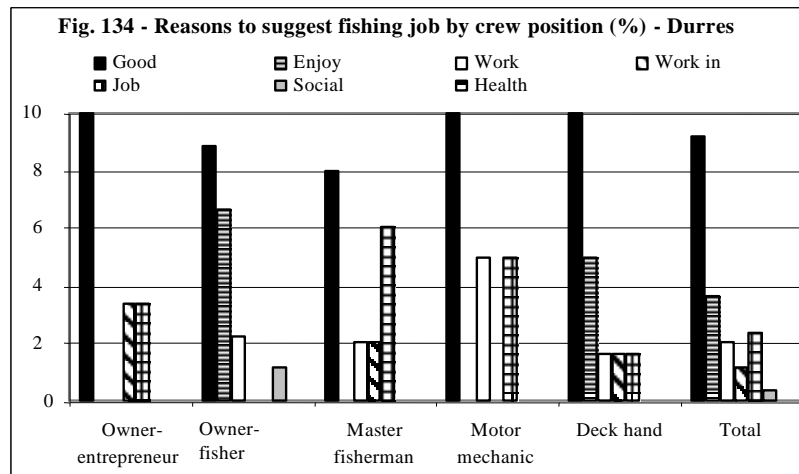


Figure 134 and 135 show the motivations of those who are in favour and against recommending others to start working as a fisher.

In the maritime district as a whole, the main reason supporting the favourable assessment was the level of income achieved, while motivations to the contrary mainly include health risks and the hard work involved by the job. The profile of motivations of the distinct professional groups within the maritime district is not substantially different. For all professional roles, the main reason is namely linked to good levels of income. Some differences can be found among the secondary motivations indicated by crew members in their various roles. In particular, a strong argument among owners-fishers, which is in some respects quite relevant if compared to income levels, is the pleasure derived by the fishing activity. Job variability is an important argument especially among fishing vessel skippers. Less relevant motivations include being in contact with the sea (a significant reason only among fishing vessel engineers) and team work (a negligible aspect among all crew categories). Finally, social status is the motivation indicated only by owners-fishers, although to a much lesser extent if compared to other reasons.



A comparison between the answers given in Durres maritime district and those provided in the entire Albanian sample shows that the level of incomes is the predominant reason indicated in the former, while the same motivation is equally important as passion for the job and working in touch with the sea for the Albanian sample. These differences between local and national reality are to be ascribed to the different picture of answers provided by crew members rather than fishing vessel owners.

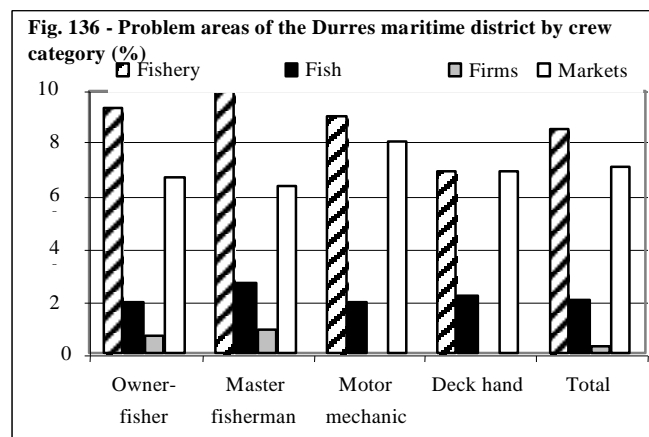
Consistently with the picture of favourable motivations, the level of incomes achieved is not among the reasons that lead the interviewed people to suggest others that they start a job in the sector. As stated before, the fisher job is not recommendable especially because of the risks it poses to one's health and as it is a hard job to do: these reasons are absolutely prevailing in the maritime district, while they are associated to income and safety in the national sample. Motor mechanics and sailors are particularly affected by the above mentioned aspects, while issues linked to work safety are more widely felt among owners-fishers and skippers. The overview of the answers given by the various professional groups in the maritime district highlights several differences in comparison to the answers provided at a national level. Apart from the higher frequency attributed by each national group to low levels of income, several differences can be found within the single professional roles: fishing

vessel owners and skippers in Durres are more concerned about health and safety issues and less worried about the heaviness of the work in comparison with the corresponding national groups; motor mechanics and sailors in Durres are more concerned about the heaviness of the work and health issues than their corresponding national categories.

Relations with other fishing vessels and crews are not easy within the maritime district. This is a peculiar element of the local reality if compared to the overall picture of the entire national sample: 86% of fishing professionals in Durres believes that relations between fishing vessels are problematic, as against a national percentage of 36%; only among owners-fishers one third of the interviewed people does not recognize the existence of problematic relations.

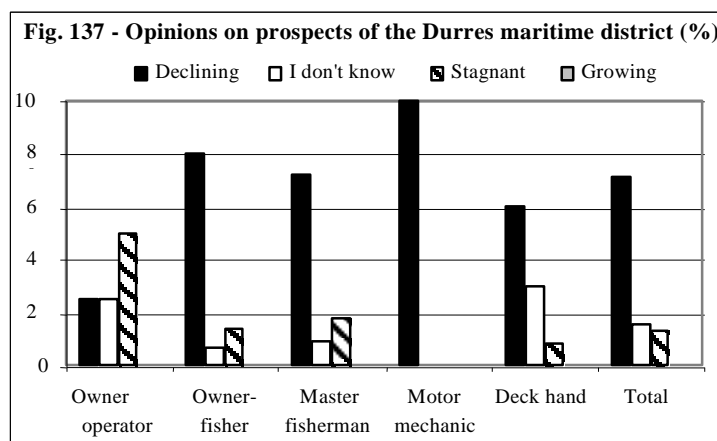
The tendency to form associations is not very high among Albanian fishing professionals: 38% of the entire national sample and only 25% of the Durres sample participate in professional associations. The average values indicated above reflect extremely differentiated situations by professional role: the participation in local associations concerns about 50% of fishing vessel owners, while much lower percentages are registered among employees' categories. No significant differences are registered between the maritime district and the entire sample here: employers' associations are much more numerous than employees' ones also within the overall sample.

The main problem areas of the maritime district are to be found in the political sphere for the fish sector and in the market sphere, while situations regarding the condition of fish resources and business management are much less critical situations (Figure 136).



From a division of answers by professional role, no substantial differences of opinion emerge between the various professional categories within the crew: only the fishing company aspect was not perceived as problematic by the lower categories on board. In comparison with the answers given by the entire sample, the problem areas of policies and markets were considered much more critical in the maritime district, while attention to resources is much less relevant in the same district.

The maritime district's prospects are considered declining by over 70% of those interviewed in Durres (Figure 137).



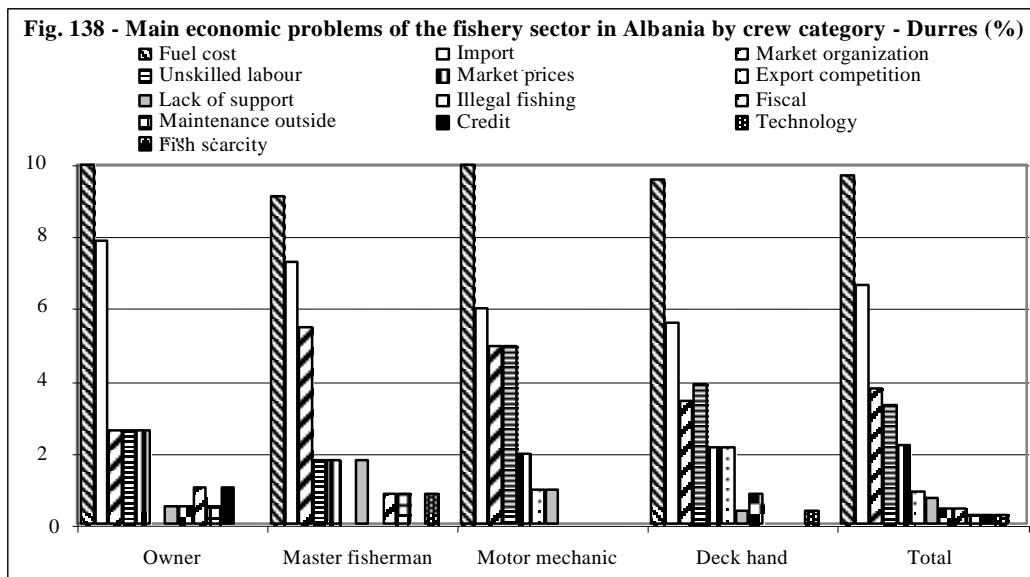
This is a very critical point of view, especially if it is compared with the corresponding percentage of fishing professionals out of the entire Albanian sample³⁶: the sector's future decline is the prospect that is most recognized among all professional roles, with the exception of fishers-entrepreneurs who mainly express indications of a stable situation; no one among the fishing professionals expresses prospects of recovery for the maritime district. All the people interviewed expressed an opinion on the maritime district's future trends, yet the indication of the main problem areas – policies, markets, enterprise, resources, other – finds no answer in 57% of the sample³⁷.

The main economic problem lamented by fishing professionals, with reference both to the entire national fish sector and to the local maritime district, regards the high cost of fuel, which heavily affects the cost and income structure of the fishing enterprise and indirectly influences crew members' pay (Figure 138). The second problem felt by all professional categories is the competition that the national catch suffers from imported products. This problem is partly related also to the inefficiencies registered in the market organization³⁸, while the same problem is not particularly felt at the level of the entire Albanian sample. Finally, quite significant economic problems are represented by the lack of qualified work force and by the market quotations of catch. The need for a qualified work force, which is felt in Durres especially by lower crew roles, is not confirmed by the corresponding national result and should therefore be evaluated with great attention for the development of the specific local fishing district. The severity of the above mentioned sector and local problems is such that economic problems that are traditionally felt by fishing professionals, like inadequate public support, tax, lending or financial problems, are pushed in the background. Unlike the other maritime districts, the problem of the scarcity of fish resources is not equally highlighted (31% answers out of the total sample). Finally, judging from the frequency of the answers given, the problem of illegal fisheries is considered to be modest, as it makes up about 20% of the entire sample.

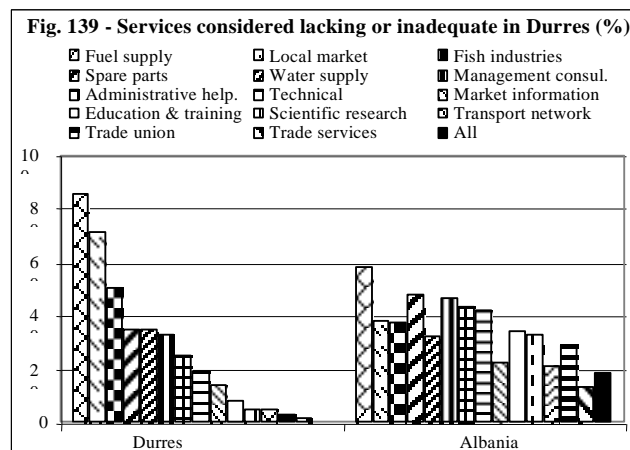
³⁶ The following percentages have been registered out of the overall sample: recovery prospects 5%; stable prospects 11%; declining prospects 46%; uncertain prospects 37%.

³⁷ The difficulty to highlight *future* problem areas also emerges from the comparison between the frequency of "no answers" –57%– and the zero frequency of "no answers" to the corresponding question on *current* problem areas.

³⁸ Only fishing vessel owners-entrepreneurs seem to be less concerned by this problem than other professional categories.



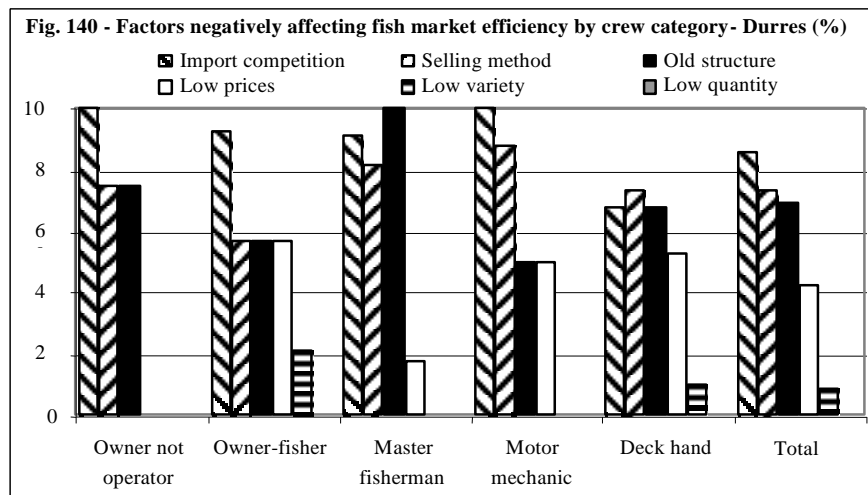
As for services (Figure 139), the main deficiencies highlighted by fishing professionals refer to fuel availability – as well as its high cost – local market facilities and the lack of catch processing industries. Secondly, about one third of the people interviewed consider water supplies and spare parts provision, followed by management and administrative counselling services to be inadequate.



The lack of immaterial services, like training and research, as well as of catch marketing and transport services, is not particularly felt instead. The comparison between service deficiencies in Durres reality and the national picture shows that, with the exception of the first three services, all other types of services are considered to be a little inadequate.

As for the issue of market organization, which was indicated among the maritime district's problematic and weak aspects, the question on the evaluation of market facilities' efficiency leaves no doubts, as all fishing professionals share a negative opinion on the matter. Such a critical judgement is specific for the Durres reality, as the interviewed in the entire Albanian sample are equally divided between those who think that market facilities are efficient and those who express quite the opposite opinion.

The inefficiency judgement is due to three main reasons (Figure 140): competition from imported products, sales methods and very old facilities. For slightly more than 40% of those interviewed, together with these factors there is an additional motivation, which is represented by the low level of quotations achieved³⁹. No importance is attributed, instead, to the volume of trade, nor to the variety of the catch marketed through the institutional market facilities.

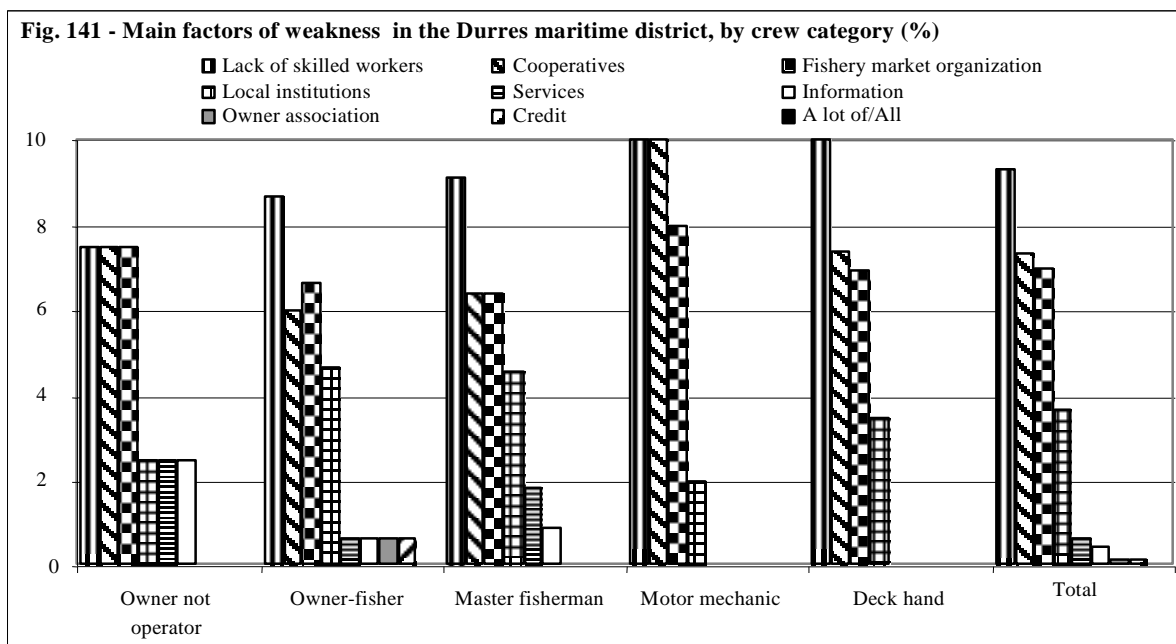


The identification of the maritime district’s weaknesses (Figure 141) highlights some of the economic problems described above. Some of them are, for example, the lack of qualified work force and the inefficient fish market organization. Another weakness registered in the maritime district refers to the presence of local cooperatives.

The three main local weaknesses were felt equally by all the professional categories involved in the maritime fishing activity. The role of local institutions was considered to be a weakness for the maritime district especially by fishing vessel owners and skippers, instead.

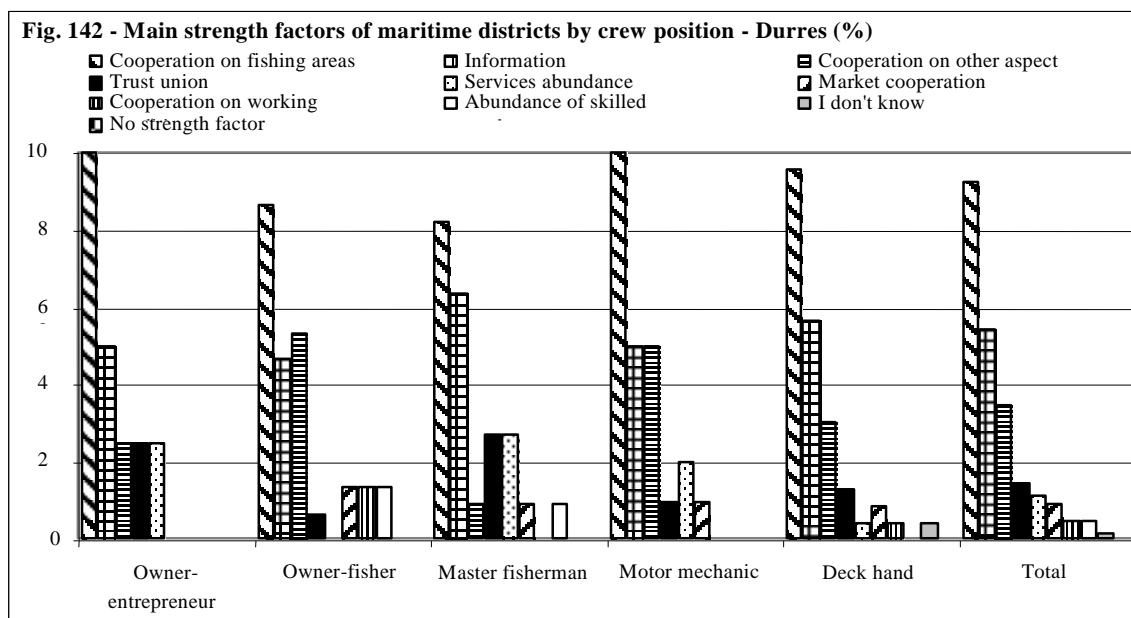
With the exception of the work force factor, which was the first weakness also registered in the entire national sample, all the other factors highlight some specificities linked to Durres maritime district. Among these specificities, it should be signalled that service availability is the second weakness registered at a national level, while this same factor is negligible for the maritime district of Durres, which is in this regard a pole of attraction in comparison to the other Albanian maritime districts.

³⁹ The above mentioned inefficiency factors have been registered also within the entire national sample, yet with more focus on the low level of quotations and less importance attributed to the old facilities of fish markets.



Both the role of cooperatives and the inefficient organization of fish markets are, instead, felt as much worse aspects in Durres.

After the analysis of the maritime district's main critical aspects – economic problems, weakness factors, service deficiencies – the local district's strengths are then investigated (figure 142).



As already observed in the aggregate analysis, answers to the question are not particularly forceful. In view of the scarce role played by the cooperative movement, previously identified as one of the main weaknesses of the local fishing reality, the collaborative spirit between the sector's fishing professionals is considered to be one of the sector's main strengths, specifically when it comes to cooperation in the field of resource catching in

fishing areas. The other two important strengths are of immaterial nature and are represented by the diffusion of information among fishing professionals and cooperation on additional aspects other than the collaboration on fishing areas. As regards the above mentioned diffusion of a spirit of collaboration among local fishing professionals, it should be however noted that this collaboration is not so much characterizing of the maritime district when it is referred to working conditions and the commercialization of fish on the markets. Together with the three main strengths indicated above, there are also other minor strengths (such as the presence of trade unions and services), which are variably felt by the single professional categories.

One last aspect addressed by the survey refers to the external relations with other fishing realities. In spite of the central role played by Durres maritime district within the national picture, the relations established with the other Albanian maritime districts are not widely perceived by local fishing professionals. This impression can be achieved by the answers on the different organizational modalities of other maritime districts and the nature of the relations between the various districts. As for the first aspect on the knowledge of the other Albanian maritime districts' different organization, a high percentage of individuals do not show a clear opinion on the matter. Uncertainty increases when passing from the category of fishing vessel owners to that of employed professionals, with this understandable phenomenon inducing to believe that the relations with other Albanian districts are stronger at the level of fishing vessel owners than for subordinate roles. Fishing vessel owners express divided opinions, with some of them believing that there are no differences in the organization between the districts and others who have no precise idea on the matter.

Also with reference to the second question on the nature of relations between maritime districts, 37% of the interviewed do not express any opinion, and in this case too the percentage increases when passing from the owners to the employees' roles. An additional 55% of individuals give a neutral assessment to the nature of the relations between maritime districts⁴⁰. The analysis of the aspects being exchanged between maritime districts is not particularly revealing. Indeed, most of the answers given by those interviewed focuses on two little significant aspects: fish resources, which by their very nature are exchanged because they are mobile resources, and information among the fishing sector's professionals. Other more specific factors, like services, shipyard assistance and trade relations, are not highlighted by local fishing professionals, apart from owners-entrepreneurs.

5.1.2 Vlore

The group of individuals interviewed at the maritime district of Vlore, totally 76, is the most numerous in comparison to the ones of the other maritime districts and accounts on average

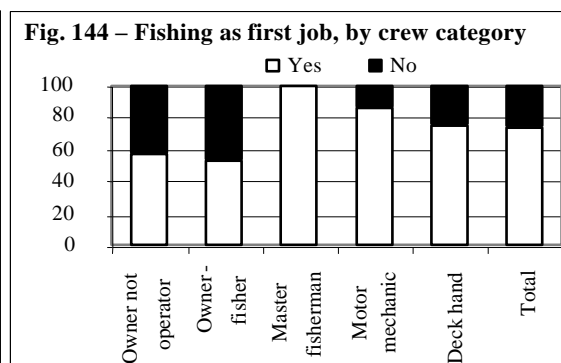
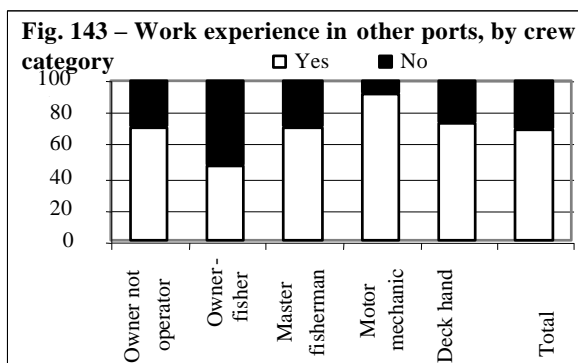
⁴⁰ The neutral assessment, however, does not allow to quantify the level of awareness of those interviewed with reference to the nature of the relations between the maritime districts, as it can consist in a generic answer rather than in actually neutral relations. The two specific answer options, namely competitive or cooperative relations, are absolutely marginal: no fishing professionals defines the relations between maritime districts as cooperative ones, while few of them, especially among owners-entrepreneurs, believe that said relations are of competitive nature.

for 40% of the total Albanian sample. The profile of Vlore’s fishing professionals goes hand in hand to the national average when it comes to education⁴¹.

The maritime district currently being considered is characterized by the low variability in the number of crew members, like Sarande, and unlike the two maritime districts of Shengjin and especially Durres.

The mobility of local fishing professionals between fishing districts is quite high (Figure 143); a higher mobility than the one registered in Vlore can be found in Durres and Shengjin, while the phenomenon has a very low incidence in Sarande. In particular, motor mechanics are the ones with the widest working experience in several fishing districts. Mobility inside the Vlore district is countered by certain restriction in the movements between the districts.

Over 74% of the individuals interviewed in the sample worked as a fisher as their first job (Figure 144). From this point of view, Vlore fishing district does not differ from that of minor Albanian maritime districts, however it is different from the one in Durres, where 58% of fishing professionals started working as a fisher as their first job. It is especially the crew’s subordinate categories the ones who benefited most by the job opportunities offered by the local fishing sector when first entering the working world.



Entry in the sector is linked to a similar job done by the father for about 35% of the fishing professionals interviewed. Owners-entrepreneurs and fishing vessel skippers are the categories where family tradition is more widespread⁴².

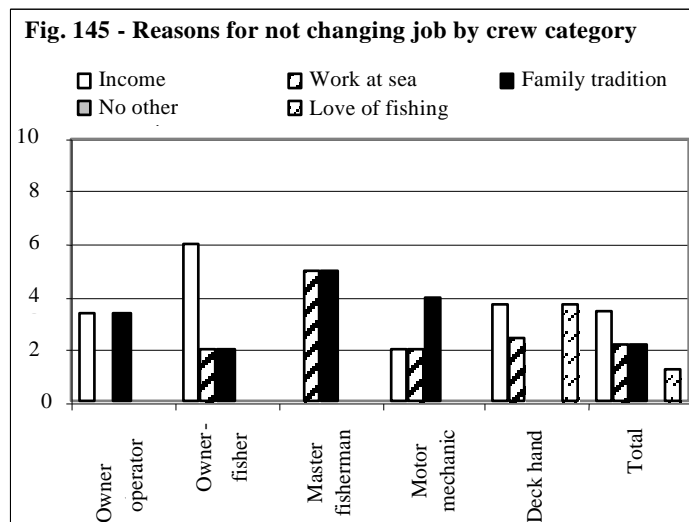
Other job opportunities emerged in the past for a limited percentage of individuals: 30% as against the 40% percentage registered for the entire Albanian sample. Fishing vessel skippers (20%) face the most difficult situation, not only in the maritime district investigated, but also in other fishing districts; this may be partly due to the more widespread diffusion of family tradition in the category, with this phenomenon limiting interest in and access to other job opportunities.

Conversely, Vlore’s fishing professionals are the least active in the search for a different job: only 14% of those interviewed has looked for a different job, in comparison to a corresponding percentage for the total sample of 21%. This percentage suggests a different

⁴¹ The local sample is divided between individuals with the lowest level of education (53%) and individuals with secondary school certificate (47%). Individuals with certificates of primary education are prevalent among the crews’ subordinate roles.

⁴²The greater family tradition for fishing vessel skippers is also confirmed in other maritime districts; the same phenomenon is frequently observed also for sailors elsewhere.

situation for the professional roles at the level of the maritime district: the crew's subordinate categories are the least active in the search for a different job, with this results being different from the one registered in Durres. On the whole, the main reason why Vlore's fishing professionals (36%) did not abandon the sector in favour of others, in which they could have had other job opportunities, mainly lies in the fear of having lower earnings from their job (Figure 145).



Fishing vessel owners are the most motivated in achieving high incomes in comparison to the earnings that could be achieved in other local market sectors⁴³. The second aspect indicated by the fishing professionals interviewed (23%) is family continuity and the pleasure to work in contact with the sea. As stated before, family tradition plays a remarkable role for owners-entrepreneurs, fishing vessel skippers and motor mechanics.

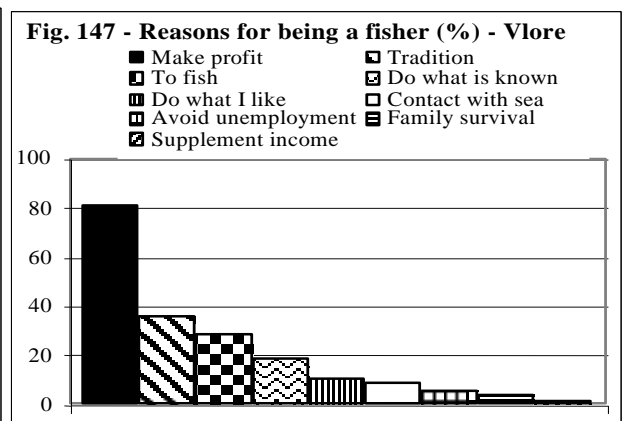
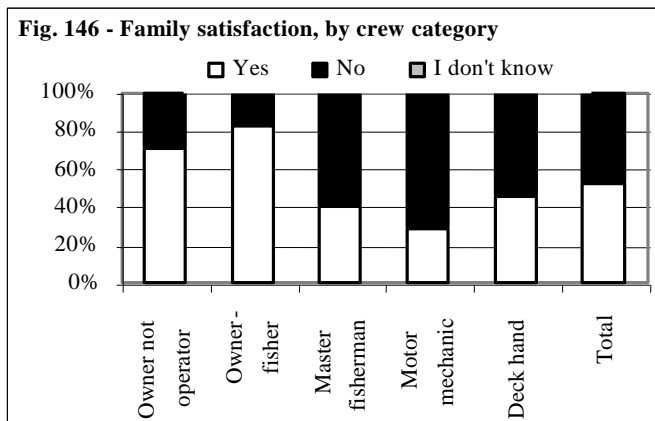
Vlore's sample was almost equally divided between those who believe that their families are satisfied (53%) and those who think they are not satisfied (47%) with their job as a fisher (Figure 146). The interviewed people's opinions are not as equally divided when considering each distinct professional group⁴⁴.

The sector's working stability is not only confirmed by the preceding questions on past experiences, but also by indications on future prospects. Vlore is the Albanian maritime district with the largest number of fishing professionals, who do not foresee to change job (93%), unlike the results registered in other maritime districts and especially in Durres (55%). This opinion is widespread among all professional categories with similar percentages.

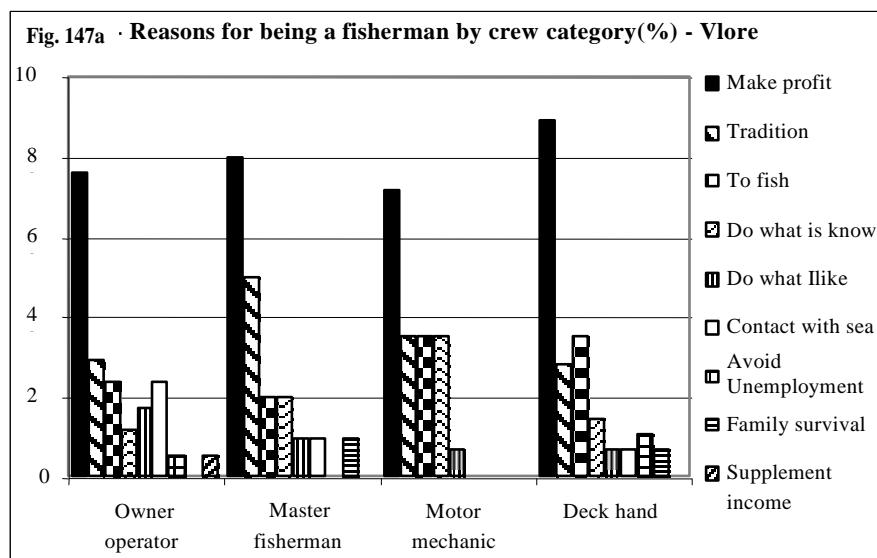
The reasons given by those interviewed in Vlore to carry out one's job (Figure 147) weigh differently if compared to the results registered in the entire Albanian sample. The maritime district's fishing professionals are sensitive to issues like earnings, passion for fisheries and family tradition continuity.

⁴³ A substantial difference emerges from the answer to this question in comparison to Durres maritime district: unlike Vlore, in Durres, income level is the prevailing reason among the crew's lower roles; again unlike Vlore, family tradition is almost irrelevant in Durres.

⁴⁴ There is a clear contraposition between the category of fishing vessel owners, who consider their family satisfaction level very positive, and subordinate roles, especially motor mechanics, who are much more critical on this issue (as already highlighted in Durres).

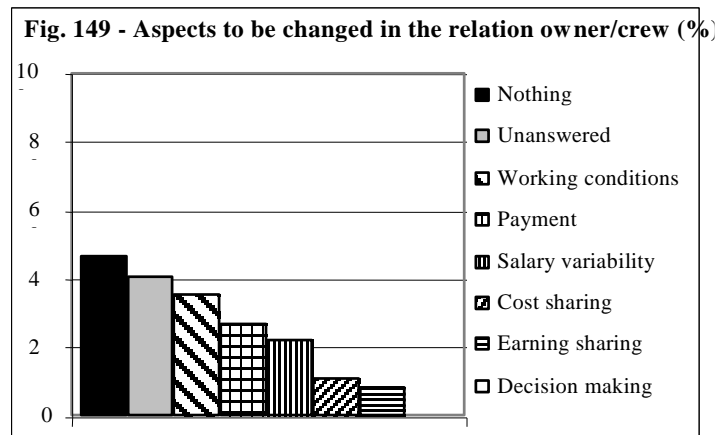


In comparison with the corresponding category groups, Vlore's fishing professionals with the exception of motor mechanics attribute a considerable importance to economic motivations (Figure 147a). Family tradition continuity is a motivation indicated especially only by Vlore's skippers and motor mechanics, and this to a larger extent than the corresponding professional groups in the entire Albanian sample. Passion for the fishing activity is felt by all professional categories working in the maritime district as a reason for being a fisher much more than their corresponding professional groups. Other factors, like family support, the job's acquired knowledge, the fear of being unemployed and income integration, are less important.

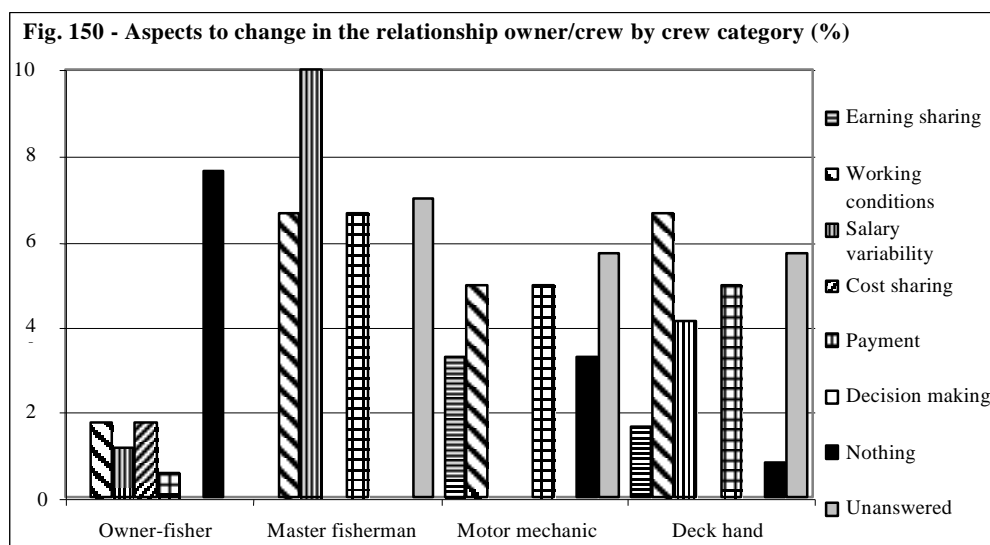


Working conditions in the maritime district of Vlore are not characterized in a negative way. As a matter of fact, no relevant aspects that the fishing professionals might be willing to change have to emerge from the economic relations between fishing vessel owner and crew members: 50% of those interviewed who gave an answer to said question share this opinion (Figure 148). This positive picture in the relations between the various categories is however put back in its right perspective when considering the high percentage of those who did not answer this question (41% of maritime district's sample). As for the specific aspects that

should be changed, working conditions, together with payment modalities and wage variability, are a cause for dissatisfaction for Vlore's fishing professionals.



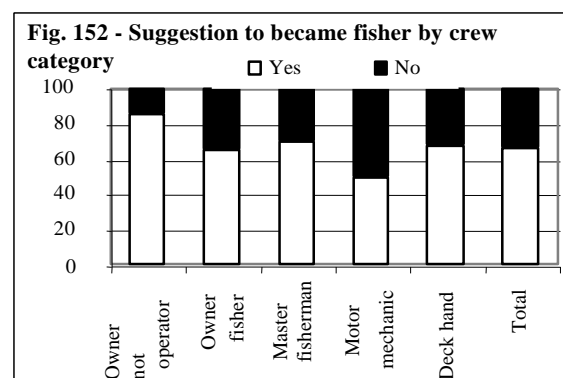
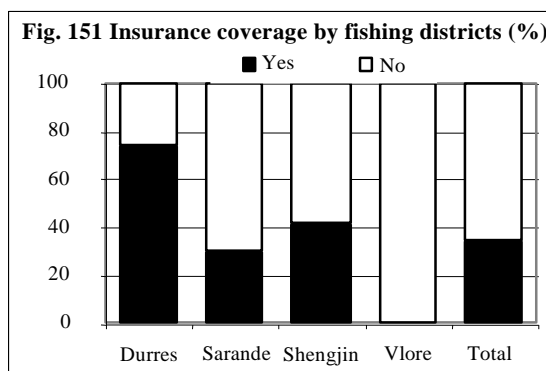
A comparison between the picture of the maritime district and the one emerging from the entire Albanian sample shows that in the former aspects related to the modalities of distribution of revenues and costs are of secondary importance, while the need to modify payment modalities is more frequently felt (time, frequency). Dissatisfaction with working conditions is not specific of the Vlore reality, as local fishing professionals attribute to this aspect a certain weight (about 40%), which is similar to those emerging from the entire national sample. The opinions expressed on this matter by the various professional categories are in part different (figure 150): the prevailing, as well as predictable opinion between fishing vessel owners is that there are no aspects to modify in the relations with the crew; wage variability between skippers, earnings distributions between motor mechanics and working conditions among sailors are aspects that are specifically felt by the various categories; finally, the percentage of “no answers” among the crew’s subordinate roles is high, ranging from 60% to almost 70% among skippers.



As for insurance coverage, the answers given indicate that the maritime district differs from the other Albanian districts for the total absence of insurance policies for the protection of crew members (Figure 151). The reason for this lies apparently almost exclusively in the high cost of said insurance policies for fishing professionals. Both these data should be further investigated in order to understand if these specific aspects of the maritime district consisting in a limited and expensive insurance coverage are due to the economic situation or to other reasons.

The maritime district's situation is quite critical, judging from the opinions expressed by almost all the sample's individuals. Such a negative judgement, which is so uniformly shared by all the various professional profiles, is rare in comparison to the other Albanian maritime district. This opinion is very clearly expressed by the fishing professionals interviewed with no "no answer" or uncertain answers, as is the case in some other maritime district.

In spite of this negative opinion, about two thirds of the people interviewed are in favour of suggesting others that they start up a job in the sector (Figure 152).



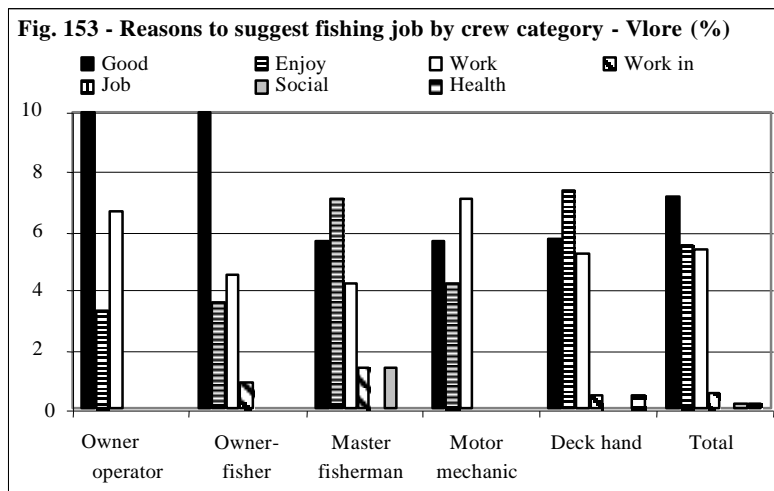
Fishing vessel owners-entrepreneurs are those most in favour, as also emerged from the entire Albanian sample. It should be highlighted, however, that in comparison to the national sample the positive assessments expressed in the Vlore maritime district do not diminish when it comes to the crew's lower categories; on the contrary, employees register a much higher percentage of people in favour than the entire sample.

Among the motivations to suggest a job in the fishing sector, the good levels of income achieved is the most important one (Figure 153). This motivation is shared by all the professional categories interviewed, although it can be noted that for the two categories of owners the achievement of good earning is the first and most important reason in comparison to other motivations, while said motivation is equally important than passion for the job and work at sea for subordinate roles.

The people interviewed deny the existence of any problem in the relations between fishing vessels or crews, thereby highlighting one of the specific characteristics of the Vlore maritime district.

The number of associations registered in Vlore at the time of the survey is a further element that characterizes the fishing district: on the whole, about 60% of the people interviewed belongs to a local professional association; as for the different professional categories, associations play a major role among fishing vessel owners-entrepreneurs, yet they very

numerous also among skippers and sailors. In other Albanian maritime districts, the incidence of associations is on the whole more modest, with significant differences sometimes being registered between the various professional categories.



Unlike the results registered in the maritime district of Durrës, resources are the main problem area characterizing the Vlore maritime district (Figure 154). This applies to almost all professional categories, with the exception of owners-entrepreneurs who believe that sector policies are the maritime district’s main source of problems. Nevertheless, policies are viewed as problem areas also by the other category of owners and by fishing vessel skippers⁴⁵.

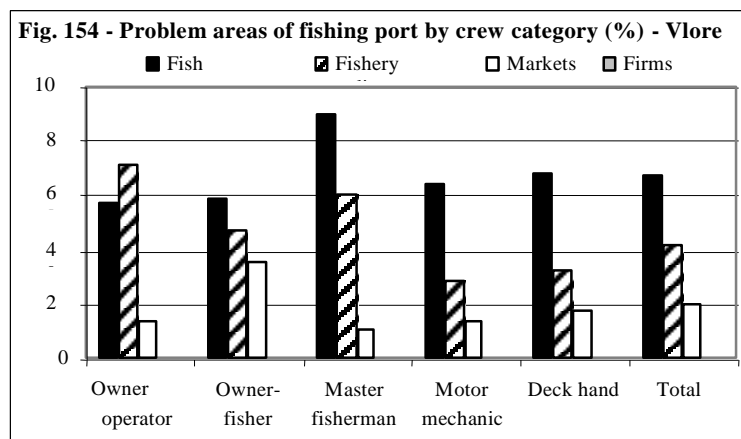
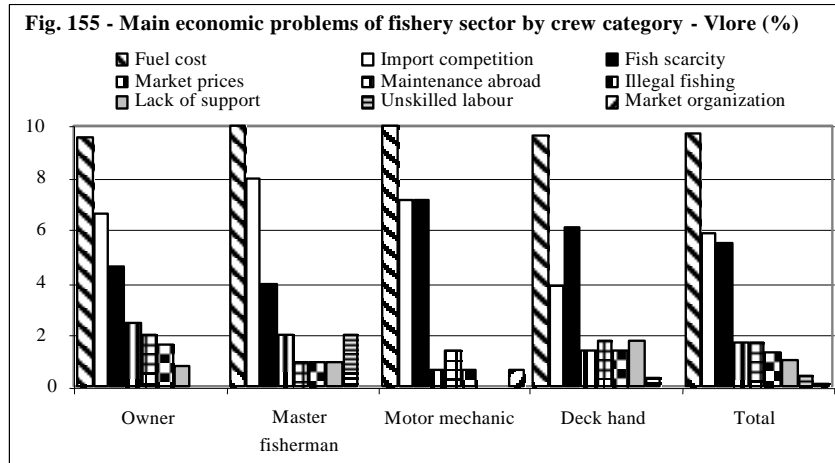
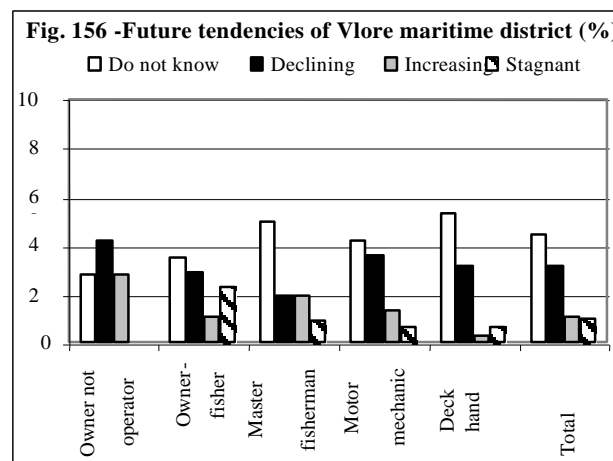


Figure 155 provides a detailed presentation of the main economic problems, which, according to those interviewed, characterized the Albanian fish sector. Three main issues emerge: a first problem is represented by the high cost of fuel, followed by imported products’ competition and the scarcity of fish resources. As already said, the problem of scarcity of fish resources is particularly felt among motor mechanics and sailors.

⁴⁵ The other answers given to the question also indicate other issues as secondary problems, namely aspects related to business and market management, which are relevant only for entrepreneurs and are essentially linked to the competition on internal markets done by imported fish products.



The maritime district's future prospects are uncertain for 45% of those interviewed (Figure 156). Employees with a subordinate role within the crew are the ones who have the biggest difficulties in giving a well defined answer, however about one third of fishing vessel owners are not in a position to express an opinion on the matter. A decline of the local fishing reality is foreseen by 32% of the overall sample, while recovery prospects are predicted by only 12% of the sample.

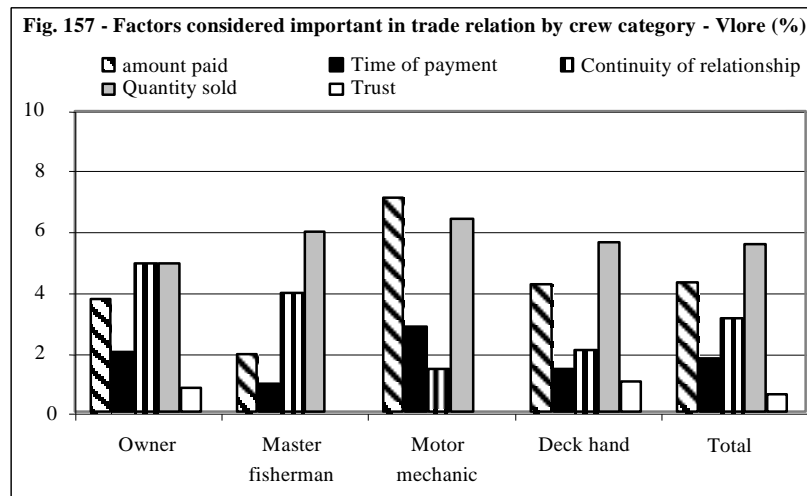


The overall assessment emerging from the results is mainly negative, and yet less critical than the one registered in Durres' maritime district, where 72% of the fishing professionals interviewed express declining prospects and no one predicts a recovery for the sector.

Finally, a comparison between the answers given on the current economic situation and those on future prospects provides for two further remarks. The first one regards quite an understandable difficulty in assessing the future rather than the present; as a matter of fact, uncertain answers or no answers at all were obtained to the question on the future situation, while this was not the case when evaluating the sector's current economic situation. The second remark refers to the fact that the predominantly critical opinion expressed on the current situation is not apparently reflected also on future prospects, which foresee a recovery for the sector, although this recovery is predicted by a limited percentage of those interviewed.

As for trade relations, a strong continuity in relations can be observed: as a matter of fact, half of those interviewed indicate that trade occurs with the same trading partners and an additional 25% of them talk about very frequent relations, when trade does not always occur

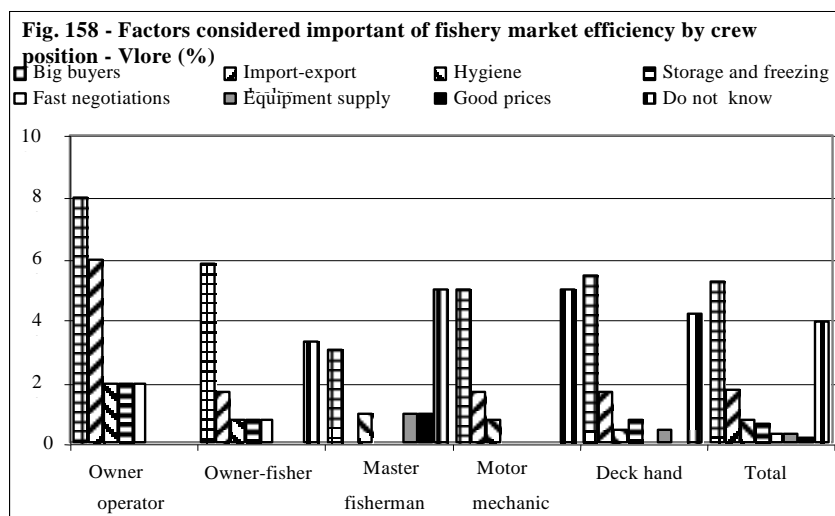
with the same partners.⁴⁶ Continuity is, however, only but one of the factors deemed important in trade relations (Figure 157).



Two other elements are considered priorities: quantities and value of sold fish. These are priorities especially for the crew's employed professionals, probably because their pay is anchored to the earnings obtained from the sale. Conversely, continuity in the relations with buyers is deemed important especially among fishing vessel owners.

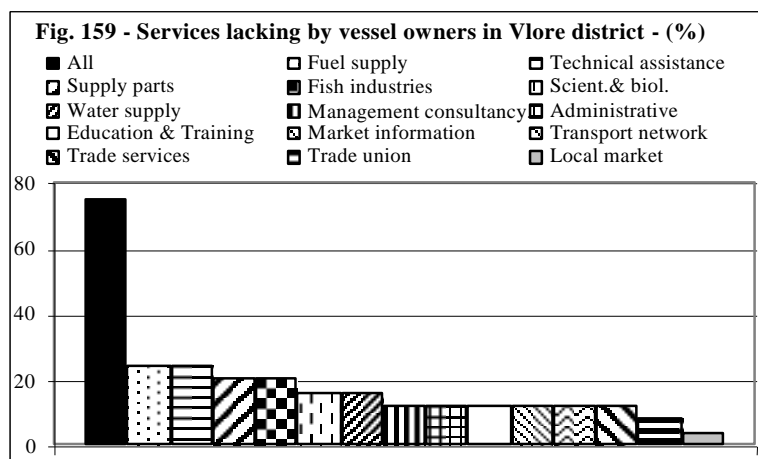
Among the maritime district's distinctive elements, attention should be drawn on the opinion expressed on the efficiency of market facilities, which unlike in Durres turns out to be largely positive among all professional categories of Vlore's fishing sector (Figure 158).

Said judgement of efficiency is however re-evaluated by the fact that about 40% of the fishing professionals interviewed cannot identify any single specific feature of efficiency for the local market. The remaining 60% identify some factors of efficiency, the most important of which is represented by the presence of big buyers in the transactions taking place on the fish markets; the presence of dealers in import-export trade is a factor considered important by owners-entrepreneurs. All other factors, i.e. fast negotiations, prices and the services provided by the market facilities, are considered, instead, to be of secondary importance.

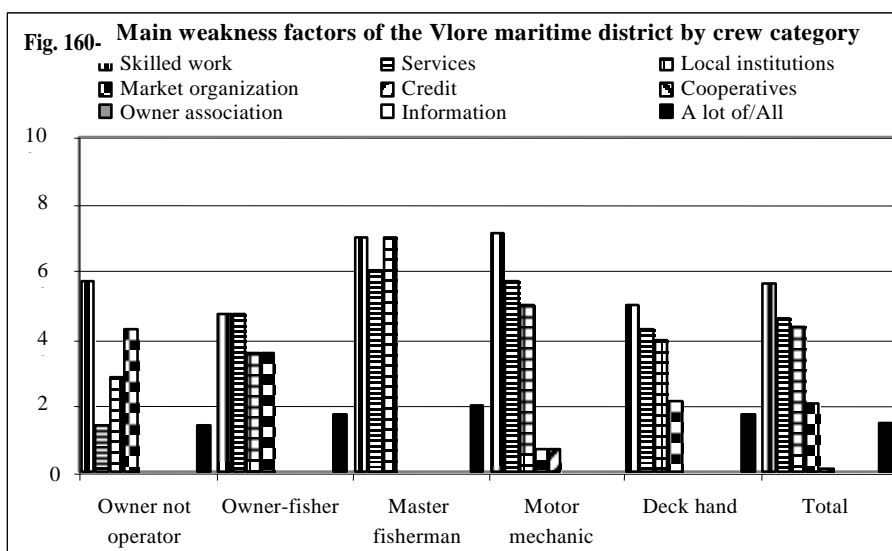


⁴⁶ Stable relations in the marketing of fish products are registered also in the maritime districts of Shengjin (81% of answers) and Durres (42%), while the product is very rarely sold to the same purchasers in Sarande (55%).

The situation is critical when it comes to the services available in the maritime district. According to about 80% of fishing vessel owners, the maritime district of Vlore lacks any type of services, as clearly shown by Figure 159. The answers by those who did not indicate any specific deficiencies show that there no substantial differences in the weight attributed to various service categories, thus confirming the evaluation of those who selected all of them.

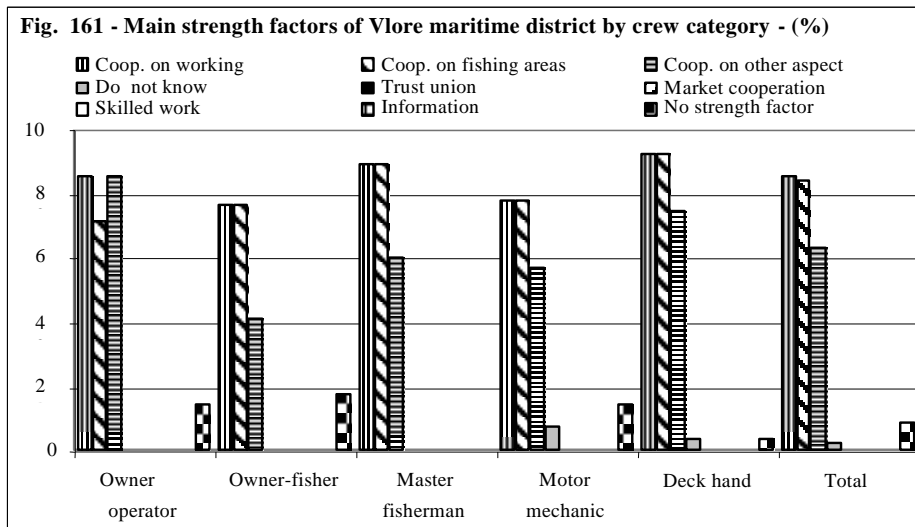


The weaknesses identified for the maritime district of Vlore (Figure 160) include first and foremost the lack of specialized work force, followed by the availability of services, in line with what was stated before, and the role played by the sector's local institutions. Fishing vessel owners add another weakness to the factors just described: fish markets' organization⁴⁷.



The picture of the maritime district's strengths emerging from the fishing professionals' answers is consistent with the analysis provided on the lack of services and weaknesses in general (Figure 161): strengths do not consist in the availability of services, work force or information, but rather only in the presence of a generalized spirit of cooperation which pervades catch areas, working conditions, as well as other aspects.

⁴⁷ Except for services, the other three aspects represent the main weaknesses registered for Durres' maritime district too. The following paragraphs will show that the two smallest maritime districts are much more similar one to the other, instead, in identifying the main weaknesses, represented by services, market organization and credit.



The survey on the maritime district ends with an analysis of the relations established with the other districts of Albanian fisheries. With the exception of skippers, all other fishing professionals deny the fact that the maritime district of Vlore has a different organization than the other Albanian fishing ports. Furthermore, the high percentage of those unable to express any opinion on this matter also has to be considered, with this aspect applying not only to crew members but also to owners-fishers. Said difficulty in the evaluation is probably the main cause for the opinion expressed on the type of relations between maritime districts, which are considered to be neutral by almost the entire sample, and on the specific factors that form the object of the interrelations and consist almost exclusively in the maintenance of fishing vessels.

5.1.3 Sarande

Sarande is the smallest among the Albanian maritime districts currently investigated by number of people interviewed and making up the sample (20 people). The picture emerging from direct investigation has the specific characteristics of a small fishing port.

The fishing professionals interviewed in the maritime district of Sarande have a lower level of education than the one registered for the entire sample: 70% of them only have a basic level of education and the remaining 30% a secondary school certificate. In almost all of the cases, no variations are registered in the number of professionals making up the crews. Furthermore, a high level of flexibility is registered as for the activities carried out, as all professional categories also perform tasks other than their main ones. In these two aspects, Sarande is very similar to the maritime district of Vlore, than to Shengjin, while the situation in Durres is different.

The maritime district of Sarande has another specific characteristic in comparison to the three other Albanian ports. The answers given by the fishing professionals interviewed outline a very close working reality in the relations with other fishing districts: only 15% of the people interviewed, mainly owners-fishers, have worked in other maritime districts; besides, the fisher job has not been the first job done when entering the work world only for one fourth of them. On the other hand, Sarande is the maritime district where the working tradition in the fishing sector registers a higher percentage than in the other Albanian ports, with 40% of the

interviewed carrying on the job done by their parent: this applies, however, only to owners-fishers (36% of the group) and especially sailors (80%).

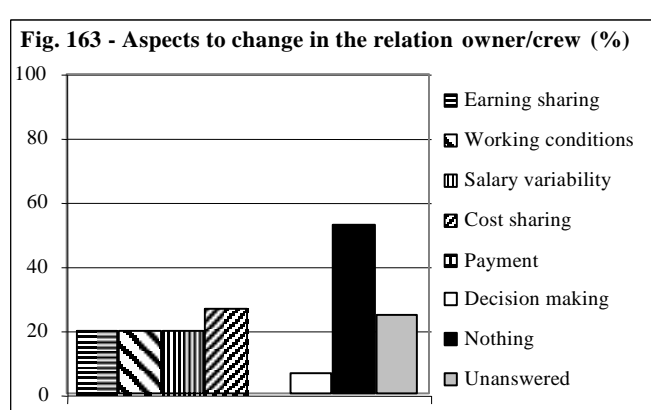
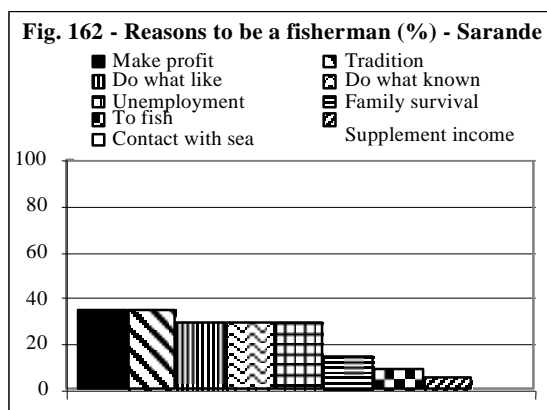
The local working situation is not easy. Only 30% of those interviewed declare to have had working opportunities other than their job as a fisher (a lower figure than the corresponding one registered for the entire Albanian sample, 40%); this figure was registered in spite of the considerable search for a different job (30% of the fishing professionals in the maritime districts as against a corresponding 20% registered in the entire sample).

The maritime district's negative picture is furthermore confirmed by two other questions on the figure of the interviewed person. The perception shown by fishing professionals of the family satisfaction with the job done is quite low (only 20% of the individuals), thereby depicting the worst situation for Sarande in comparison with the other Albanian districts. Negative answers can be registered from almost all the crew's lower categories – motor mechanics and sailors -, but they are relevant also among owners-fishers (82%).

Sarande is the Albanian maritime district, where the prospect to change job is most widely spread among local fishers: 40% in the maritime district investigated as against 7% of the total sample.

Unlike the picture outlined for the entire Albanian sample, income level is not the main reason to work as a fisher in Sarande (Figure 162). A whole series of motivations are considered to be equally important: incomes but also family tradition continuity, enjoying the job and the knowledge acquired in carrying out the activity, as well as the fear of being unemployed.

Relations between members of the crew do not present considerable elements of dissatisfaction in comparison if compared to the corresponding figure registered for the entire Albanian sample: over 50% of the individuals interviewed excluded the presence of aspects that should be modified in the relation between owner and crew members (Figure 163).



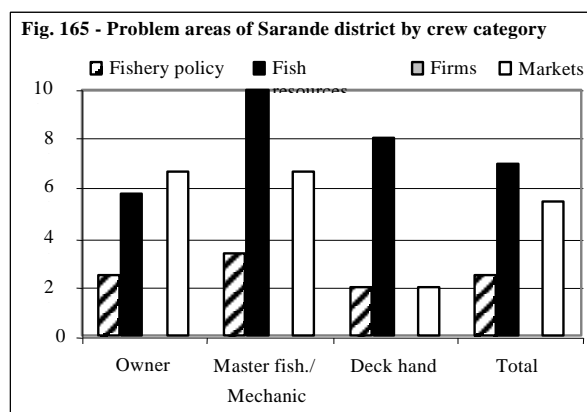
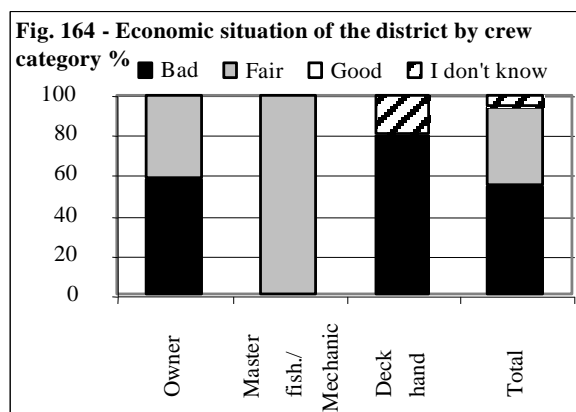
A similar situation is observed only in the maritime district of Vlore, while the weight attributed to the lack of aspects to change is much less relevant in the other Albanian fishing ports. Except for the modalities of cost distribution, local fishing professionals are much less sensitive to changing all other relevant aspects.

The local fishing reality's economic situation (Figure 164) is assessed positively by about 60% of those interviewed, with this percentage representing in particular owners and lower roles within the crew, while intermediate roles are much less critical.

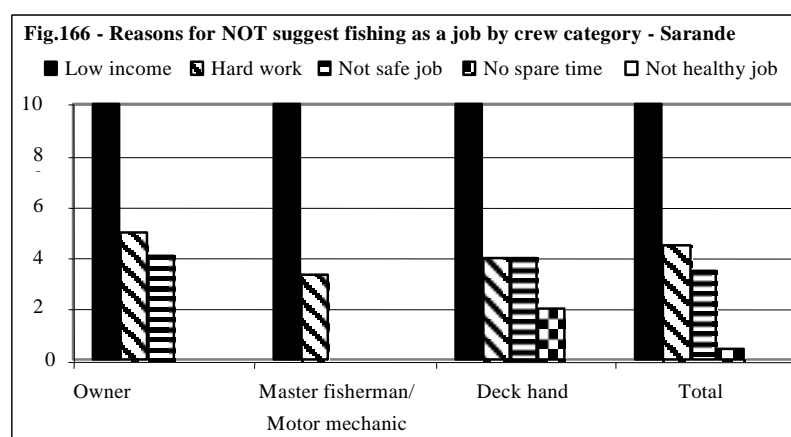
In spite of the small size of Sarande's fishing district, the working environment does show a number of problems in the relations with other fishing vessels and crews: these problems are

recognized by 40% of the local sample, especially fishing vessel owners and sailors. A limited tendency to form associations and professional groups is registered. Furthermore, it is interesting to note that the two categories acknowledging the existence of problems in the relations within the maritime district itself show a lower tendency to form associations than the categories of skippers and motor mechanics.

A different picture than the one outlined for Durres and Vlore emerges when it comes to highlight the maritime district's problem areas (Figure 165): Sarande's fishing professionals believe that fish resources' availability and markets are the main problem areas of the local fishing reality⁴⁸.



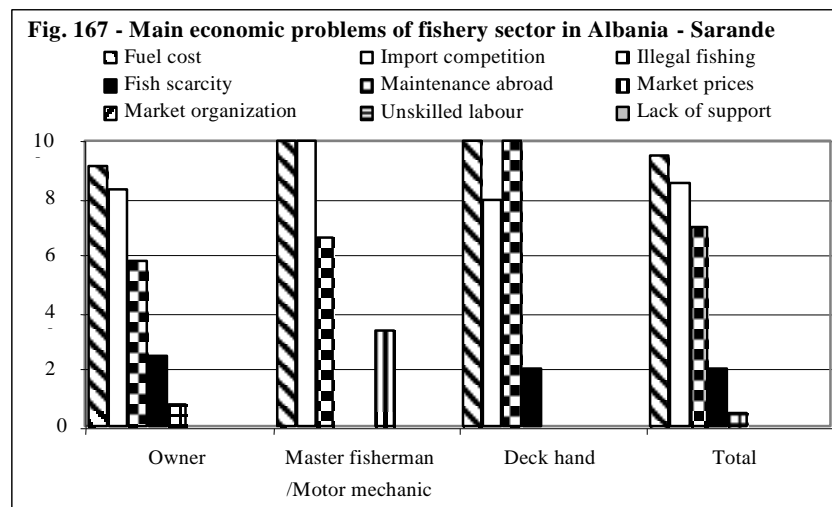
Opinions on the maritime district's future trends are split between those who predict a decline of the local reality (45%) and those who express an uncertain opinion on the matter (40%). The difficult working situation of the maritime district's professionals is indirectly confirmed by the fact that no one among those interviewed would suggest others that they start a job in the sector, with this being a peculiarity for Sarande unlike the other Albanian ports. The main reason for this, which is valid for all the people interviewed irrespective of their category, is the job's low level of earnings (Figure 166).



The fishing sector's range of economic problems (Figure 167) does not differ from the results emerged from the analysis of the two previous maritime districts, as the most serious

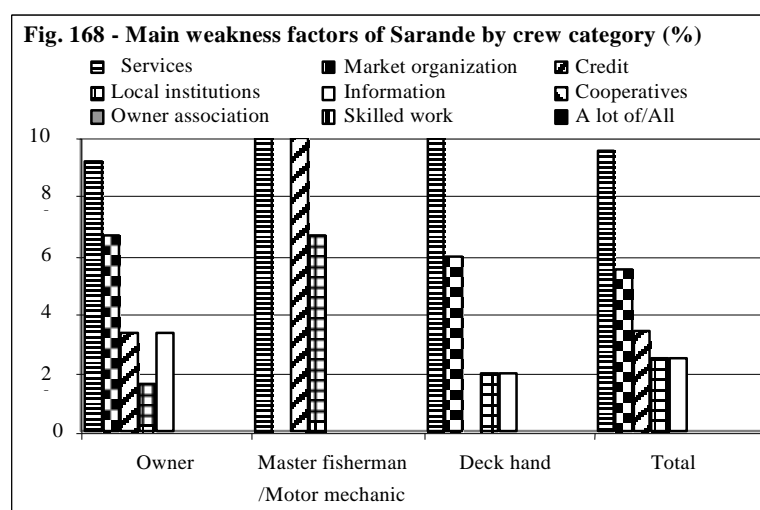
⁴⁸ The problem of resources is mainly felt by crew's employees rather than owners, while the issue of market is not relevant for sailors.

problems consist in the high cost of fuel and the competition from imported products in Sarande's case too.

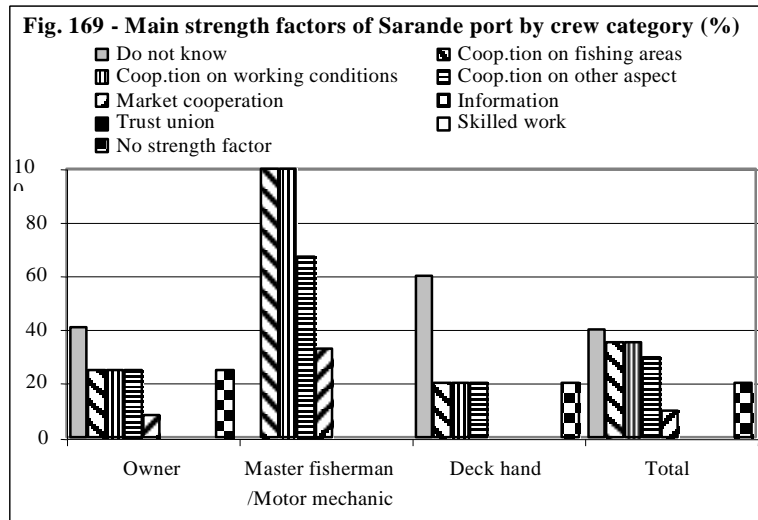


A peculiarity of Sarande emerging from the answers regards the problem of illegal fishing, which is not registered in such a high percentage elsewhere. There is no significant difference between Sarande's problems and the fishing sector's problems identified at a national level: the three same major problems are identified (high cost of fuel, competition from imported products and illegal fishing), however a further problem linked to the maintenance of fishing vessels emerges for Sarande and does not find an adequate answer in the local fishing reality. The picture of the economic problems identified is completed by the analysis of the strengths and weaknesses of Sarande's maritime district.

Service availability is the main weakness registered in the maritime district, which has been identified as such by almost all the people interviewed (Figure 168). Other minor weaknesses are the fish market organization and credit availability.



The survey on Sarande's maritime district ends with the identification of the strengths that the local fishing district can boast in the opinion of the sector's fishing professionals (Figure 169).



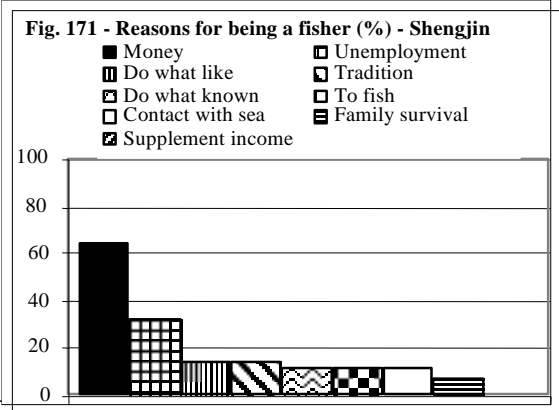
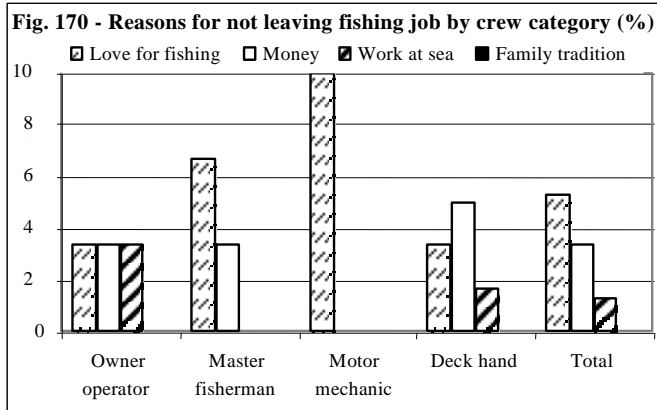
In this respect, a first negative result is represented by the opinion of all those who do not identify any strength among the ones given as a reference, nor do they suggest any other strength. This combines with the even higher percentage of those who cannot indicate any strength at all: this is the case of individuals belonging to the categories of fishing vessel owners and sailors. Specific strengths are linked to the existence of a widespread spirit of cooperation that applies to a wide range of issues, including fishing areas and working conditions.

The comparative analysis between the four maritime districts investigated will show that the picture emerging for Sarande is probably the most difficult one from all socio-economic aspects considered.

5.1.4 Shengjin

The last maritime district investigated, Shengjin, is a small fishing district presenting a number of aspects in common with the district of Sarande. The situation of Shengjin's maritime district does not differ from the overall picture as for the level of education of the 28 fishing professionals interviewed: about 60% of the people interviewed have a primary education level and an additional 36% has a secondary school certificate. The variability in the number of members making up the crews is in line with the average registered for the entire Albanian sample, i.e. 25% of the answers given. The percentage of those who worked as fishers in other maritime districts is very high: 82% of the people interviewed in Shengjin as against an average figure of 70% registered for the entire sample. The percentage of those who started working as a fisher as their first job when they first entered the work world is, instead, in line with the national average of 70%: this figure emerges even if a job in the sector is a consequence of the continuity of family tradition only in 30% of the cases.

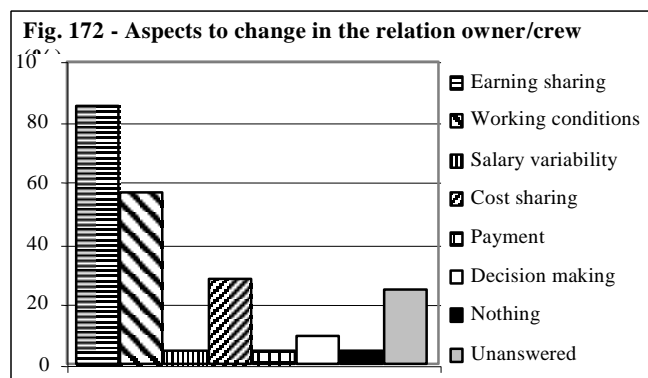
This is the maritime district with the highest number of fishing professionals with previous work experience other than the one as a fisher, who have decided not to leave the sector for two main reasons (Figure 170): passion for the fishing activity –in particular in the case of skippers and motor mechanics - and lower wages for alternative jobs – especially among sailors.



A job in the fishing sector is not a cause for family dissatisfaction: unlike the other Albanian maritime districts, none of the fishing professionals interviewed believes that their families are not satisfied and 60% of them provide a positive evaluation; however, a higher percentage of uncertain answers (40%) are registered. The positive evaluation on the degree of family satisfaction decreases when it comes to lower categories of workers.

As for prospects to change job, the maritime district's situation differs from that of the other fishing ports especially for the remarkable uncertainty characterizing 30% of the fishing professionals; no prospects of a future job change emerge from the remaining sample. In Shengjin too, devotion to the fisher job (Figure 171) is mainly due to earnings obtained, similarly to the results emerging from the entire Albanian sample. Instead, differences emerge when considering the second motivation indicated as a reason to carry out a job in the sector: the fear of being unemployed, which is particularly felt among motor mechanics and sailors, is a specific weakness characterizing the Shengjin district, while the same reason does not appear to be so serious in the other Albanian maritime districts.

Shengjin's delicate situation is highlighted also by those aspects of the fishing professionals' working relation that the individuals interviewed would like to change (Figure 172): these are mainly aspects regarding pay and working conditions.

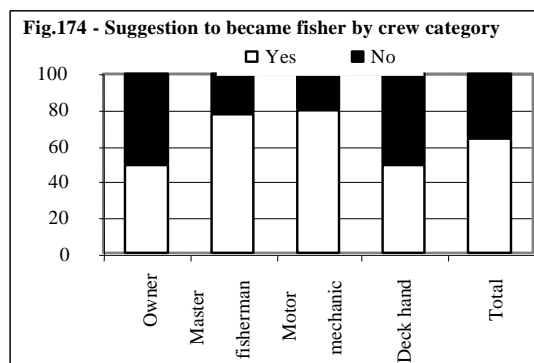
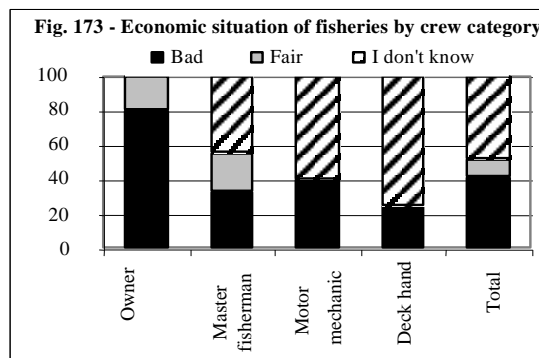


Furthermore, while only 5% of Shengjin's fishing professionals believe that there are no aspects to change; a much more important weight within the entire Albanian sample is attributed to the modalities of distribution of the activity's earnings and costs, as well as to working conditions.

The maritime district's economic situation leaves no room for positive evaluations: the sample is essentially split between those who deem said economic situation negative and those who are unable to express any opinion on the matter (Figure 173). As is the case

elsewhere, fishing vessel owners are the most critical categories, while the crew's lower categories are the most uncertain ones.

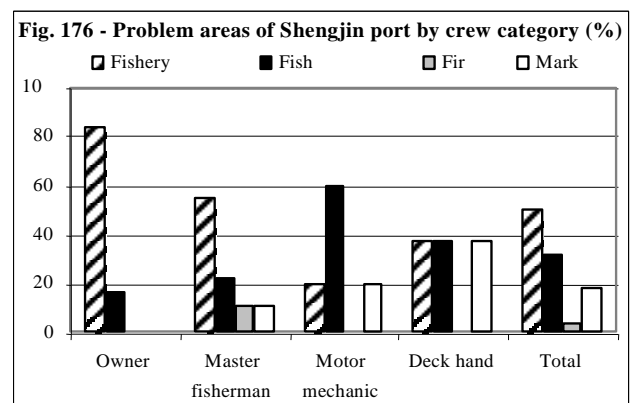
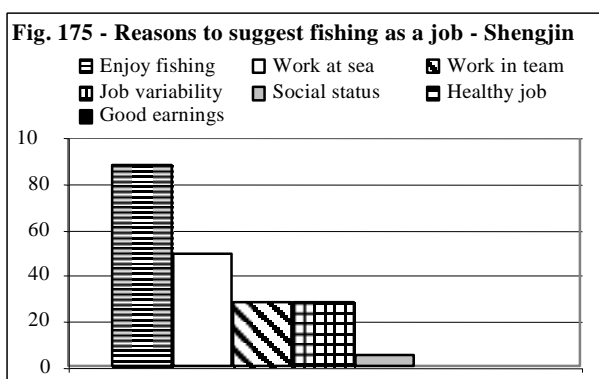
In spite of these evaluations, fishing professionals are however willing to recommend the fisher job (Figure 174) to all those wishing to start working: about two thirds of those interviewed namely believe that a job as a fisher can be recommended and even higher percentages are registered among the two professional groups skippers and motor mechanics.



The reasons given to start working in the fishing sector (Figure 175) include the pleasure to carry out the activity, as well as factors linked to the working environment and modalities; the pay received by the various professional groups working in the fishing sector is not considered to be a significant reason.

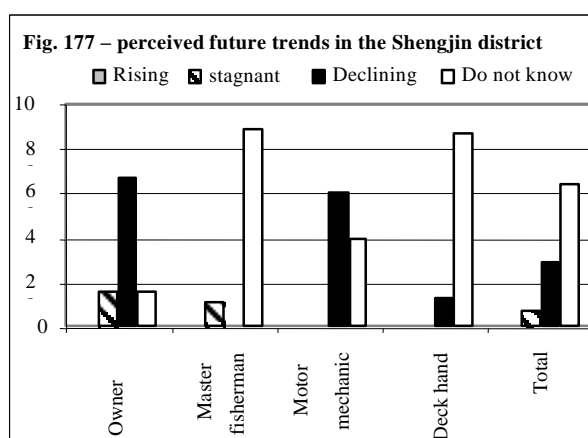
Interpersonal relations within the crews and between fishing vessels are on the whole quite good: a significant number of individuals highlighting the existence of difficult relations are registered only among motor mechanics.

Sectorial policies and the availability of fish resources are the main problem areas for the maritime district's fishing professionals (Figure 176).



Different points of view are expressed by the various professional categories: fishing vessel owners believe that their fishing district's main economic problems are mainly due to sectorial policies; skippers share the same view; motor mechanics see in resource availability the main problem area; and, finally, sailors attribute an equal relevance to policies, resources and markets as main problem areas.

Opinions on local fisheries' future prospects should be analysed against the background depicted above (Figure 176): these prospects leave no room for positive evaluations as for the recovery or development of the sector. Uncertain opinions on the maritime district's future trends (64%) are much more prevalent among skippers and sailors, while the critical evaluations on the local fishing reality are mainly expressed by owners and motor mechanics. As for the important aspects to be considered for trade relations (Figure 177), about 80% of those interviewed indicate the time in which payment for sales' compensation is effected to be the essential aspect in trade exchange. This aspect is followed by the amount paid and trade relations' continuity. Trust in trade relations is indicated as the last factor.



As for the existence of differences in the answers given by the various categories, the main aspect to stress refers to the extremely predominant weight attributed by the crew's lower categories – motor mechanics and sailors – to the time of payment, with this aspect playing a much more important role than all other factors.

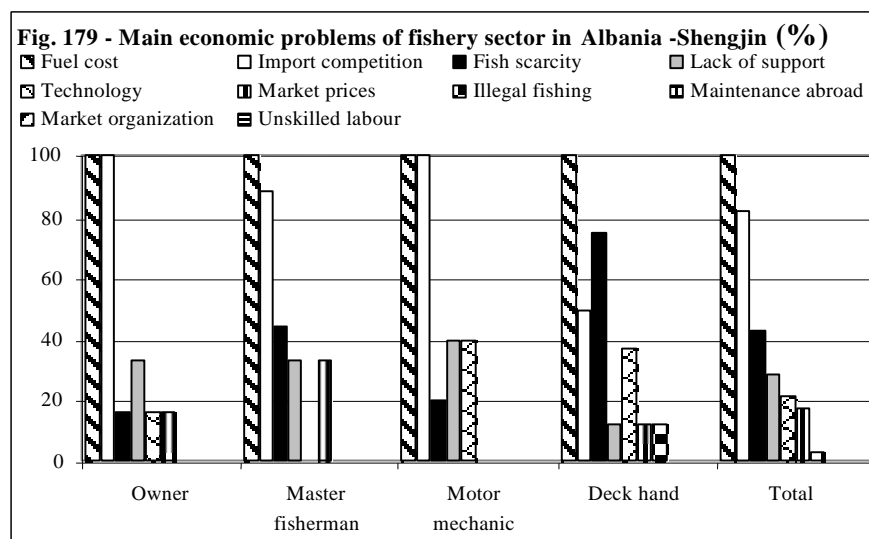
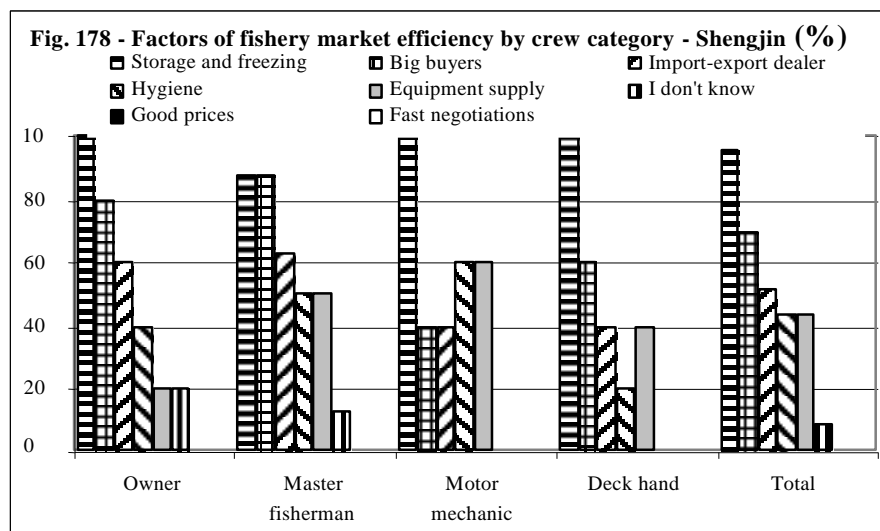
Again with reference to fish products' commercialization, Shengjin's maritime district is a really peculiar case in comparison to the other Albanian maritime districts in the opinions expressed on the efficiency of the local market. As a matter of fact, over 80% of those interviewed believe that the fish market functions well; opposite opinions are expressed to a certain extent only by owners-fishers and sailors, while the other three professional categories almost entirely express a positive judgement of efficiency.

According to those interviewed, efficiency is to be ascribed first and foremost to the existence of facilities for catch conversation, then to the presence of big purchasers and import-export dealers (Figure 178).

A secondary role, which is yet not to be neglected, is played by the respect for hygienic conditions and the availability of materials and equipment. The analysis of the maritime district's lack of services is in line with the picture described above, with all the aspects concerning fish products' commercialization not indicated as a problem area; instead, several

deficiencies in the services provided are considered to be very severe ⁴⁹ as for services targeted to both enterprises, and to the crew and the fishing vessel.

As for the fishing sector’s economic problems (Figure 179), in Shengjin’s maritime district too the high cost of fuel is considered the most important problematic aspect highlighted by local fishing professionals at the moment of the survey. Aspects of secondary importance are the competition of imported products and the scarcity of fish resources, especially among sailors; the lack of public support is signalled by all categories, except sailors.

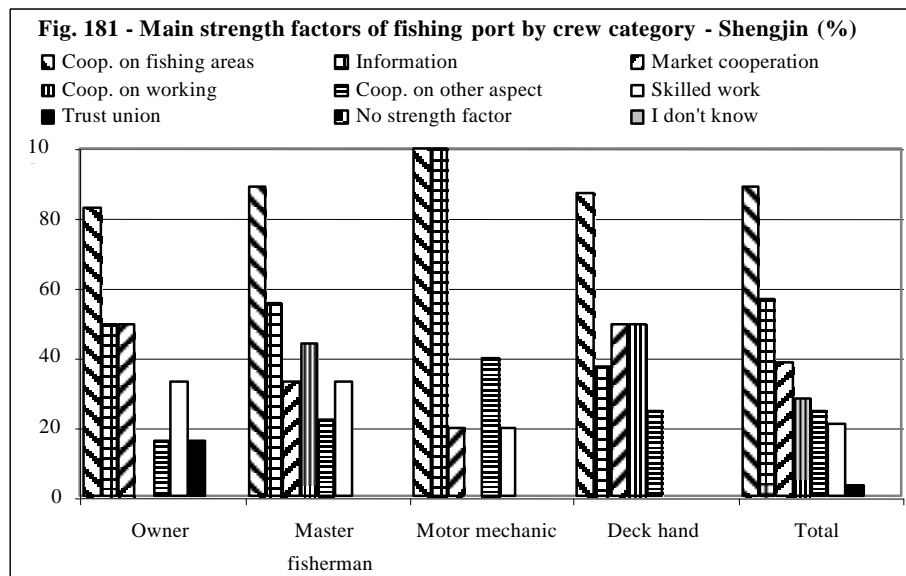
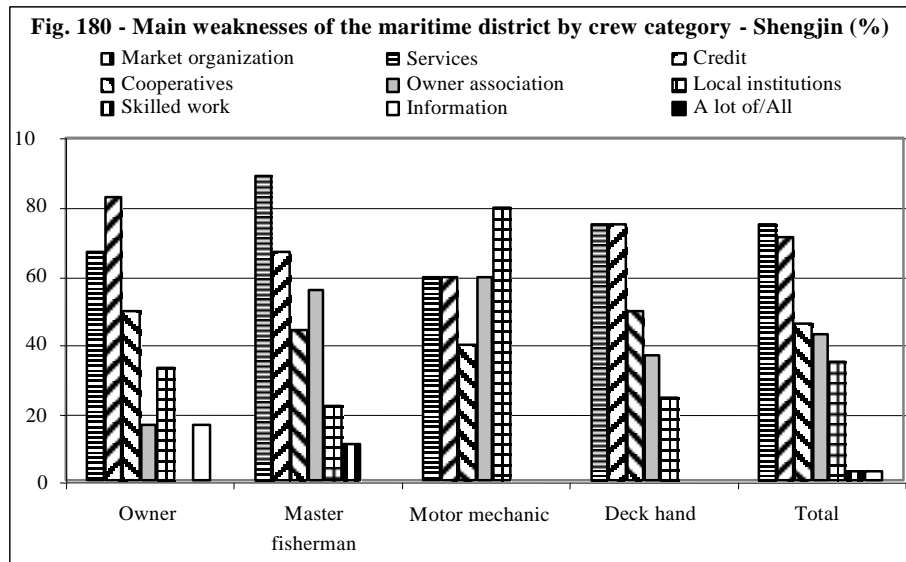


The weaknesses highlighted for the maritime district (Figure 180) include as priority issues the lack of services and credit availability; secondly, weakness factors have emerged especially within cooperative facilities, protection organizations – especially among the crew’s roles – as well as local institutions. As previously stated, market organization is not considered a weakness, instead; the same applies to the availability of qualified work force

⁴⁹ As for services for enterprises, the main deficiencies are registered with reference to managerial and legal counselling services; as for fishing vessels, the individuals interviewed mainly complain about insufficient services of technical assistance and provision of material and equipment; training and professional categories are problem areas where services are lacking with reference to the crew.

and the diffusion of information within the sector. As stated above, these aspects seem to be recurring in the two smallest Albanian maritime districts, while different weakness factors are registered for the two bigger ports.

Also in Shengjin, the maritime district's strengths (Figure 181) essentially refer to a spirit of collaboration pervading the relations between local fishing operators as for fishing areas and markets, as well as to the availability of information.



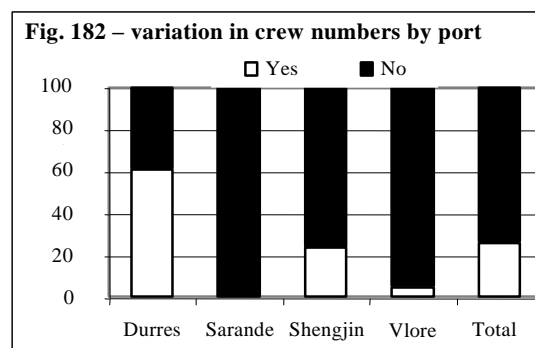
By way of conclusion, the maritime district's fishing professionals seem to be essentially identified with their own fishing reality. It namely emerges that those interviewed are unable to express evaluations both on the different organizational characteristics of other fishing ports (about 80% of the sample), and on the nature of the relations between their fishing district and other fishing realities. The relations between the various fishing districts mainly consist in shipyard services and in the exchange of information between the sector's professionals.

5.1.5 Comparison of the Albanian maritime districts

After a detailed analysis of each single maritime district, the following pages will attempt to provide a summary based on the comparison between the four Albanian fishing ports.

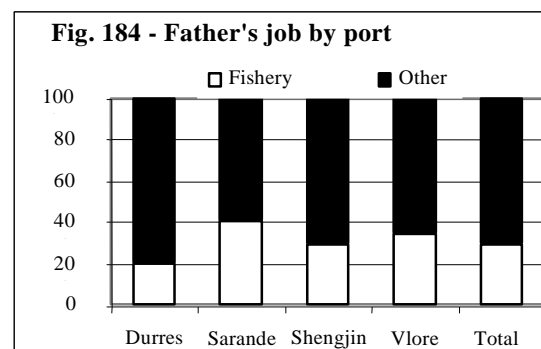
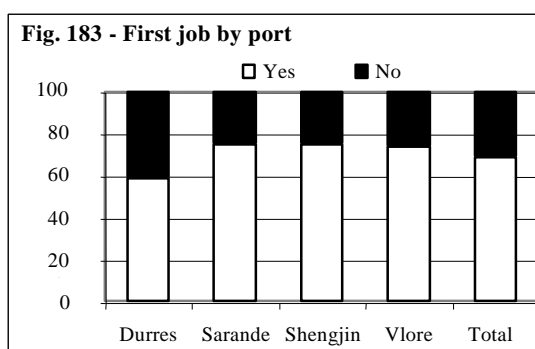
For all the phenomena investigated, a selection has been made with the aim of highlighting the possible peculiarities of each single fishing port or the presence of similar conditions between the four local districts.

A first aspect highlighting considerable differences between the four Albanian maritime districts regards the crews and their stability as for the number of their members (Figure 182). The situation emerging in Durres is clearly different from the one registered in the other Albanian fishing ports: over 60% of the individuals interviewed in the first maritime district shows crews with a variable number of members, while this variability is quite modest in the other three ports.



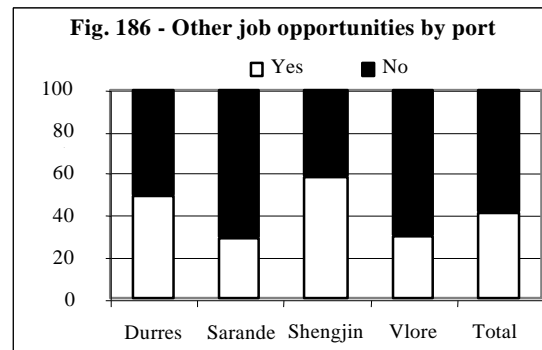
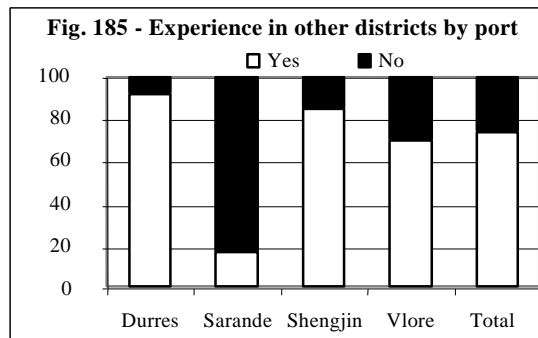
In all the maritime districts analysed, the professional integration into the fishing sector's working life has been the first opportunity to enter the work world (Figure 183). Yet quite a remarkable difference emerges from the maritime district of Durres, where about 60% of the fishing professionals started working in the fishing sector as their first job, and the other maritime districts, where the corresponding figures are nearly 80% of those interviewed.

The incidence of the answers on the father's job (Figure 184) shows a certain similarity with the results of the previous question. Here again Durres differs from the other ports: in the first maritime district about 20% of the professionals interviewed works in the same sector as their father, while the corresponding percentage in the other ports is higher, reaching approximately 40% in the maritime districts of Sarande and Vlore.



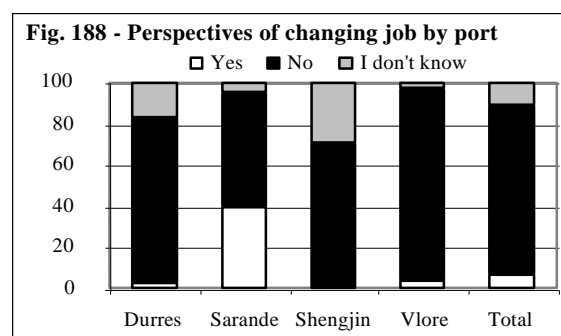
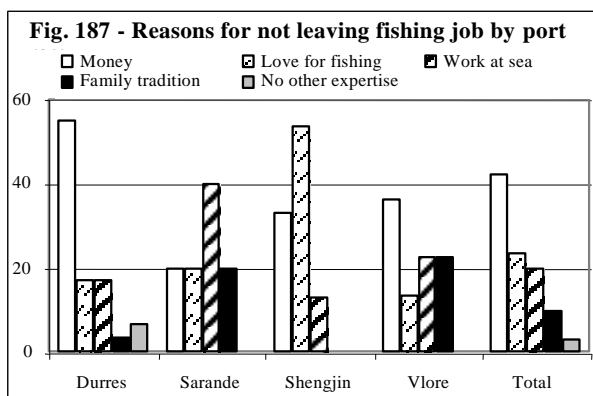
Two other questions referring to work experience in the sector highlight a number of differences between the various Albanian fishing ports.

On the whole, the professionals interviewed have worked in the sector also in maritime districts other than the one they currently work in (Figure 185). Sarande's maritime district stands out from this general picture, as 20% of Sarande's fishing professionals have worked in other fishing ports, while the corresponding percentage for the other maritime districts is on average 80%. A comparative picture on the existence of job alternatives in sectors other than fisheries (Figure 186 shows that the situation registered in Sarande is similar to that of Vlore (in about 30% of the cases), while in the ports of Durres and Shengjin the possibility of alternative jobs has been registered for over half of the people interviewed.



Those who have been presented with other job alternatives indicate the level of incomes achieved as the first reason why it is recommendable to keep on working in the fishing sector (Figure 187), yet differences between the various maritime districts can be registered. Income level is the prevailing reason given among fishing professionals working in the maritime district of Durres (with very small importance attributed to other motivations); income is indicated as the main reason also in the case of Vlore; the fishing professionals interviewed in Sarande and Shengjin, instead, mainly focus on reasons linked to the contact with the sea and the passion for the fishing activity respectively, rather than on economic reasons; finally, the attachment to family tradition plays a significant role in Vlore and Sarande, even if it is not one of the main reasons indicated.

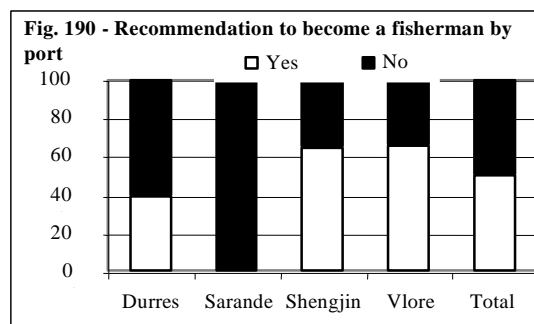
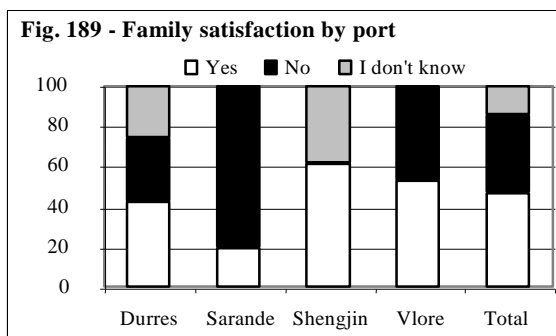
The people interviewed mainly deny the possibility of a future job change (Figure 188): this is the opinion of almost all fishing professionals in Vlore, as well as of most of the people interviewed in Durres and Shengjin; in these two maritime districts, however, about 20% of the individuals interviewed expresses no opinion on the matter.



Sarande stands out as a specific case, as unlike the other fishing ports there are prospects of job change in Sarande and they are even quite widespread among those interviewed (40% of the corresponding sample).

A relevant role in the perception of future prospects is played by the degree of satisfaction, which in the opinion of the fishing professionals interviewed their families have with reference to the job done (Figure 189). Here again, Sarande represents a peculiar case, as over 80% of the individuals interviewed in this maritime district believe that their families are not satisfied with the job they do. The following situations are registered in the other fishing ports: Vlore’s fishing professionals are split in half between those expressing positive evaluations and those who come out with negative ones; in Shengjin about 40% of the individuals interviewed do not have any opinion on the matter, while the rest of the sample expresses a positive opinion; finally, in Durres over 40% of those interviewed believe that their families are satisfied, while the other fishing professionals are split between negative evaluations and no opinion at all on the matter.

In order to further analyse the Albanian fishing sector’s working conditions, the people interviewed were asked if their job, although in the variety of professional roles that can be contemplated within a fishing enterprise, can be recommended to those who wish to start a job in the fishing sector (Figure 190).



The entire sample is split in half between those who are in favour and those against, yet an analysis of the answers given at the level of each single maritime district shows different local situations. In particular, the entire sample of Sarande’s fishing professionals would not recommend others that they start working in the sector, with this result going hand in hand with the critical picture emerged from the previous answers. Negative opinions prevail in Durres (60%), while over 60% of the professionals interviewed would suggest others that they take on their own job in the two other maritime districts.

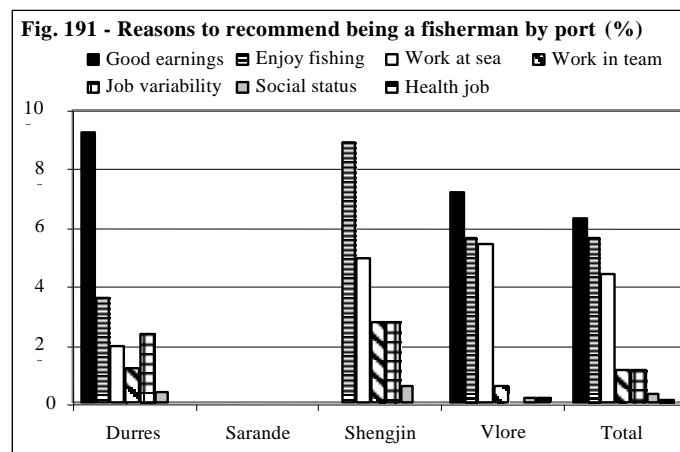
Figures 191 and 192 illustrate the main reasons provided for judgements in favour and against the start of a working activity in the fishing sector.

Pay is the main reason provided to recommend a job in the fishing sector by the fishing professionals working in Vlore and especially in Durres; the same motivation is not registered in Shengjin, instead, where other reasons linked to the passion for the fishing activity are given. Those who do not recommend the fisher job to others at the level of the Albanian sample indicate low pay as their main motivation for their opinion: a detailed analysis in the single maritime districts shows Sarande at one extreme, where the above mentioned motivation seems to prevail, and Durres at the other extreme, where the hard job and the risks posed to one's health are indicated as the main reasons. The other two maritime

districts are to be found in a middle position, in which there is a significant level of pay, but other aspects, i.e. the heavy job, are important as well.

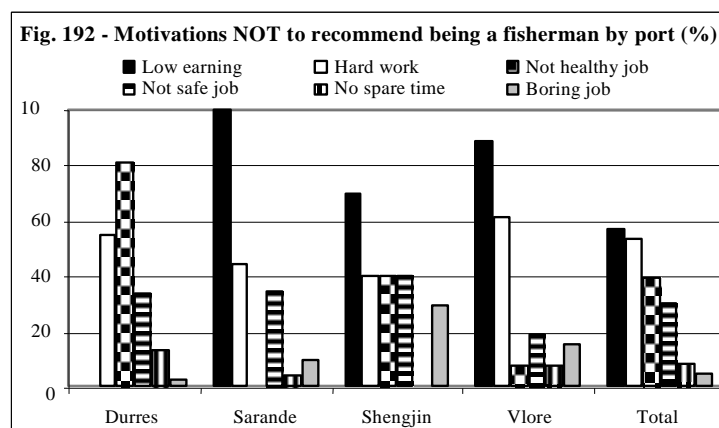
In order to provide a general overview of the various maritime districts as against the entire range of phenomena linked to the fishing professionals' working conditions, the following assumptions for the interpretation of each single local reality can be made.

The most difficult situation is registered in the maritime district of Sarande, where the fishing sector's work market and the work market of other sectors are not particularly lively and workers increasingly show the willingness to change job. A certain degree of attachment to the sector is registered, also for family reasons, and the rate of economic satisfaction is not particularly relevant, thereby maybe limiting the degree of family satisfaction related to working in the fishing sector. This picture is completed, and thereby Sarande's negative situation confirmed, by the fact that this is the maritime district with the most active search for alternative jobs carried out by the fishing professionals and with the highest rate of part-time jobs, even if in modest percentage, in comparison to the other fishing ports.



The maritime district of Durres can be found at the other extreme of Sarande; Durres is a fishing port characterized by a more dynamic work market both for the fishing branch and for other sectors, as well as by a less present generational legacy, economic motivations justifying the attachment to the sector and no changes foreseen in the future working situation. The two other maritime districts of Shengjin and Vlore can be found in an intermediate situation between the two extremes.

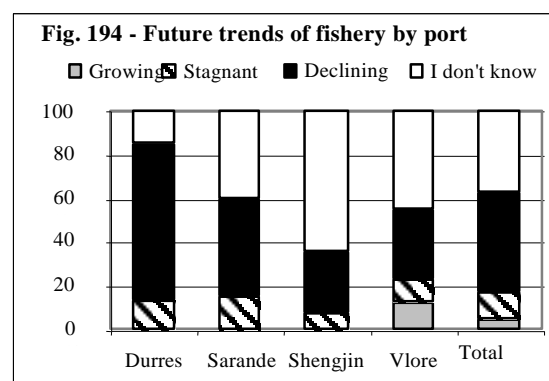
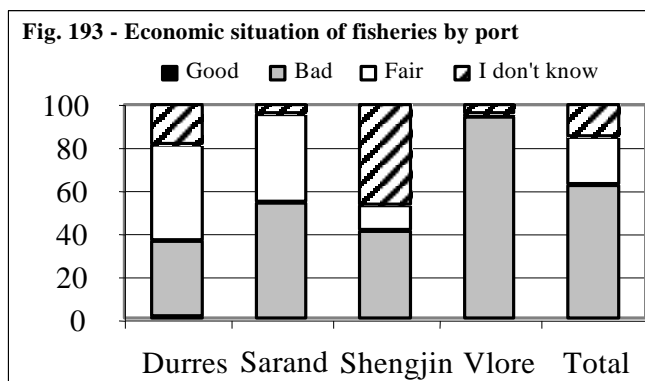
A comparative analysis of the four Albanian maritime districts' situation shows further specific elements with reference to the state and prospects of the fishing ports, as well as to the strengths and problems of each single local fishing district (Figure 192).



The four maritime districts' current economic situations appear to be differentiated according to the opinions expressed by local fishing professionals (Figure 193).

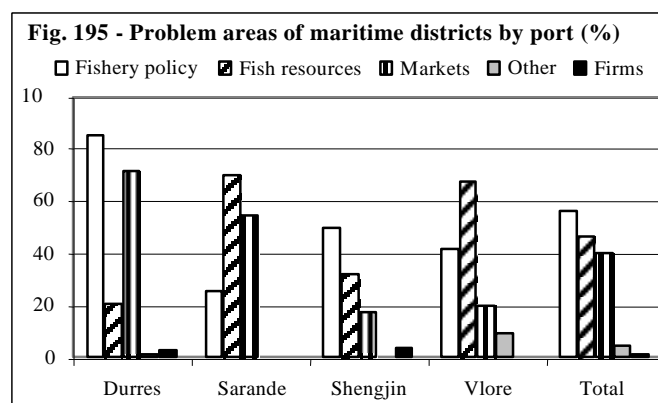
Within the mainly negative framework emerging for the entire sector, Vlore stands out, as almost all of the people interviewed express a critical judgement on the maritime district's economic situation. Negative opinions coexist with fairly good assessments in Durres and Sarande (except for the fact that the judgements expressed have the same weight in Durres, while negative ones prevail in Sarande). Finally, a further element consists in the lack of opinions on the matter among half of the fishing professionals of Shengjin, with the remaining part expressing a mainly critical opinion.

The evaluations of the current economic situation do not apparently significantly influence the opinions on future prospects (Figure 194).

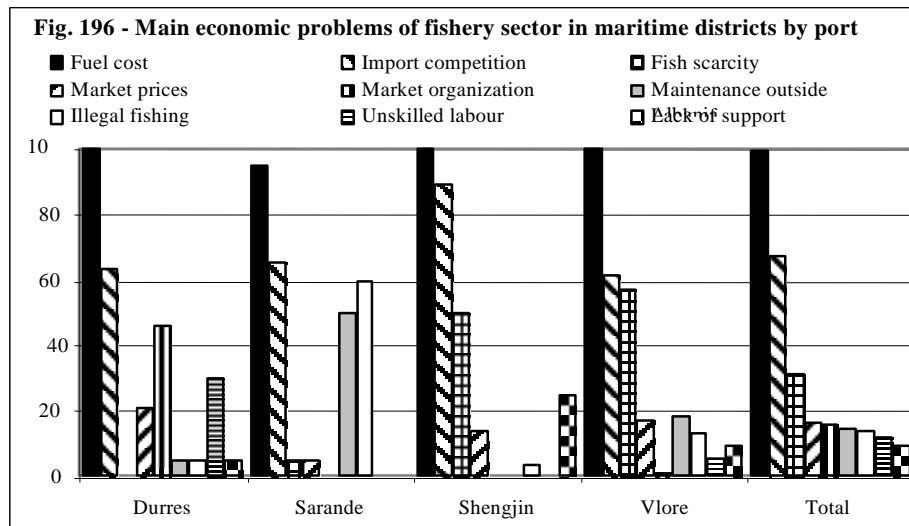


As a matter of fact, it can be observed that in Vlore, in spite of the high incidence of negative opinions on the current situation, answers on future prospects are mostly uncertain on the one hand; on the other hand, however, negative evaluations weigh much less and Vlore is the only fishing port where some opinions on the recovery of the sector were also registered. In Durres about 60% of fishing professionals talk about declining future prospects, although the same number of negative and fair opinions is also registered with reference to the current situation (40%). Finally, the incidence of fishing professionals who are unable to express any opinion on future prospects is always very significant in Shengjin, as emerged with reference to the evaluations of the current economic situation.

Policies, the availability of resources and market trends are the sector's main problem areas (Figure 195).



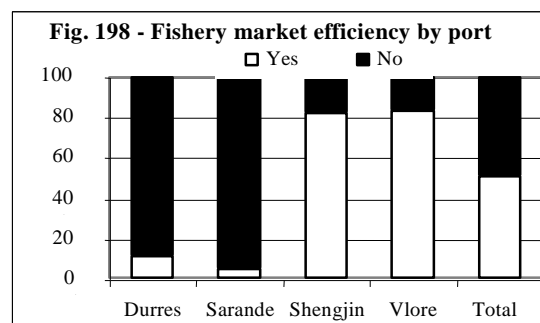
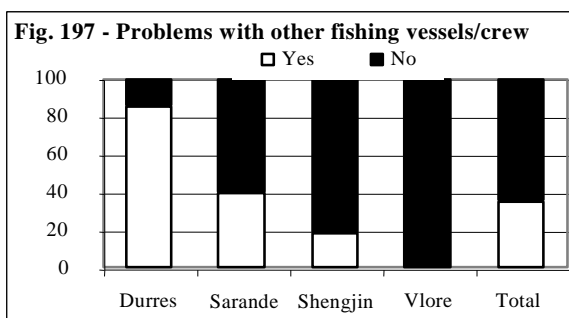
Although these three problem areas are equally important at the level of the entire sample, each single maritime district highlights some specificity: policies and markets in the case of Durres, resources and markets in Sarande, resources and policies in the other two districts. A more detailed analysis of the sector's economic problems (Figure 196) shows that the high cost of fuel and the competition from imported products are cross-cutting problems for all local fishing ports. Yet some specific aspects emerge.



The weight attributed to scarce fish resources is significant in Vlore and Shengjin, while this issue is not highlighted in the other fishing ports; as for Sarande, professionals complain about the issue of fishing vessel maintenance and strongly denounce the problem of illegal fishing, while the same issues are not highlighted in the other maritime districts; finally, Durres shows a peculiar situation with reference to market organization and the qualification of the work force.

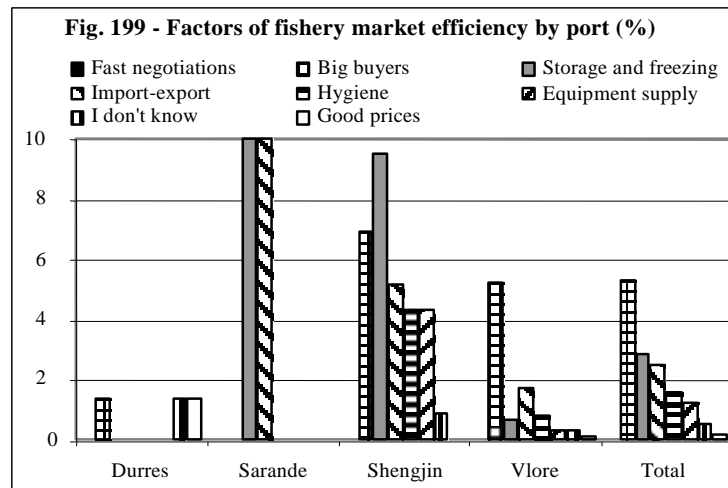
No problems are registered with regards to the relations with other fishing vessels and crews by about 60% of the overall sample (Figure 197). The result for the entire sample is however affected by the situation in Durres, where over 80% of fishing operators do not believe that the relations within their local community are problematic; this is a specific situation for Durres, which is not confirmed by any of the other three maritime districts, where the people interviewed mainly manifest the opposite opinion.

Another problem area where further specificities at the level of each single district are registered regards the opinions on market facilities' efficiency (Figure 198).



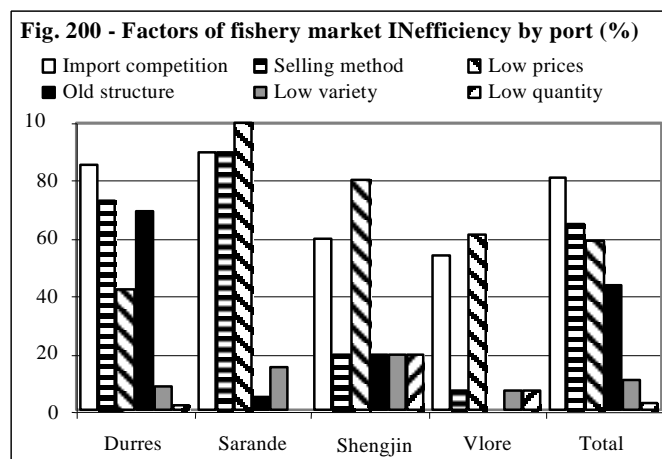
Durres and Sarande can be found at one extreme, as almost all the people interviewed within their respective samples believe that fish markets are not efficient; conversely, Vlore and Shengjin are at the other extreme, as mainly positive evaluations are expressed in these two fishing ports.

Figures 199 and 200 show the main reasons supporting positive and negative opinions on the efficiency of local fish markets.

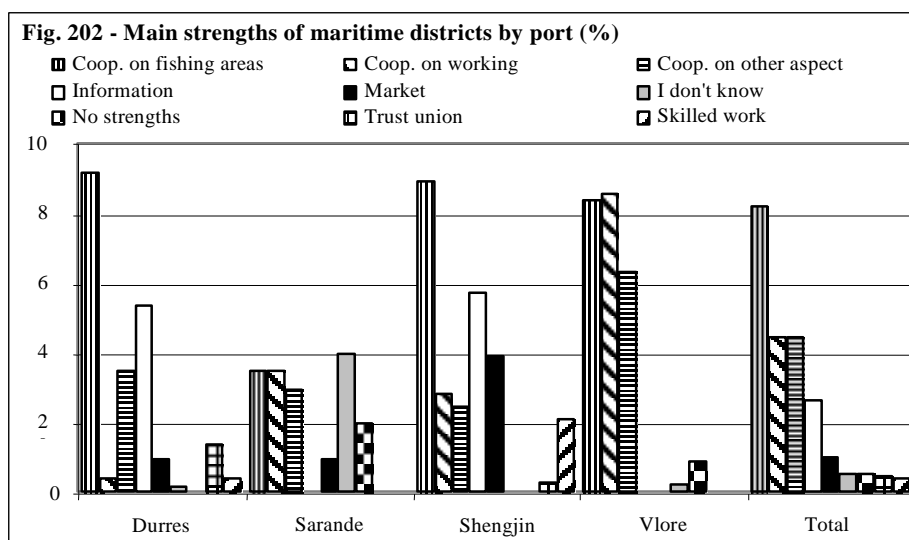
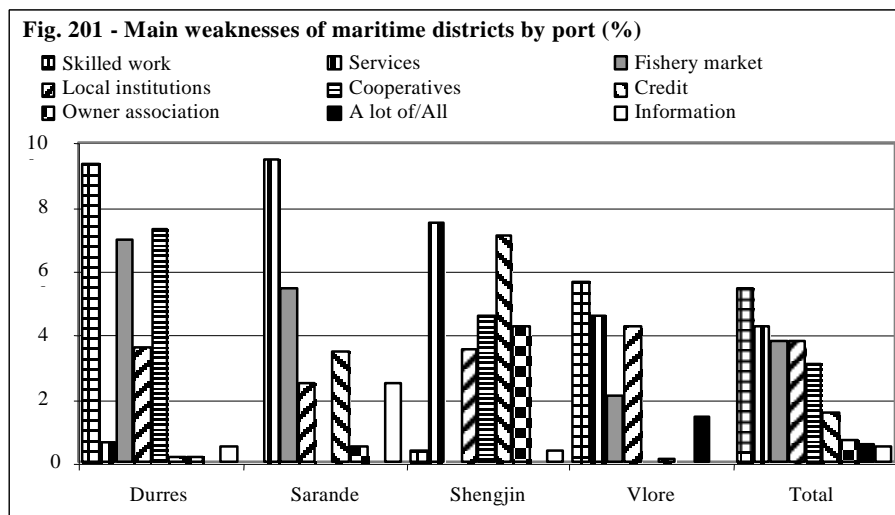


Efficiency judgements, which are prevalent in Vlore and Shengjin as stated above, are almost exclusively due to the presence of big trade dealers on the market in the first fishing district. As for Shengjin, efficiency factors are much more articulated: together with facilities for catch deposit and conservation, are important factors contributing to efficiency are the presence of big import-export dealers, hygienic conditions and available equipment.

Factors of inefficiency are mainly registered from the answers of Durres and Sarande's fishing professionals, with both maritime districts indicating as reasons for inefficiency the competition from imported products on local fish markets and the modalities for product sales (the first inefficiency factor is also denounced in Shengjin and Vlore). Durres and Sarande stand out for their very old market facilities, with this factor being a reason for complain for Durres' fishing professionals, and the low quotations, mainly suffered by those interviewed in Sarande. The price problem is significant also in Shengjin and Vlore.



An analysis of the weaknesses and strengths highlighted by local fishing professionals is finally provided for the comparison between the various fishing ports (Figure 201 and 202). As for weaknesses, both common and locally significant specific weaknesses can be identified. The lack of professionally skilled workers is the first weakness of Durres' maritime district and a significant element also among those working in Vlore, thereby being a common factor for the two biggest fishing ports. The lack of services is instead a common weakness registered in the two minor Albanian ports of Sarande and Shengjin. As indicated above, product commercialization represents a weakness for those interviewed in the maritime districts of Durres and Sarande. A weakness factor with a considerable and specific importance in Durres is represented by the role of cooperatives. Finally, the insufficient availability of credit and the minor role played by owners' associations are two specific weaknesses emerging from the maritime district of Shengjin. All districts register a similar result with reference to the weight of the support given by local institutions, with this factor representing a weakness for all the investigated fishing ports.



As for strengths, an element common to all maritime districts is the presence of a spirit of collaboration within the local fishing communities.

Some specific aspects emerge also from the analysis of strengths.

A collaborative atmosphere spirit characterizes a whole series of fields in the maritime district of Vlore, ranging from catch in the fishing areas, to working conditions to other aspects; in the ports of Durres and Shengjin strengths are mainly represented by the absence of conflicts in the relations between fishing vessels with reference to catch areas; again in Durres and Shengjin, fishing professionals see a strength in the spreading of information; finally, market cooperation is the main strength registered in Shengjin.

A negative evaluation has to be made for the picture emerging for Sarande's maritime district, with quite a high percentage of those who believe that the local fishing port presents no strengths at all, and an equally high rate of those who are unable to identify specific factors for their district.

5.2 Socio-economic aspect of Albanian marine fisheries: conclusions and perspectives

The analysis carried out above on the main socio-economic features of Albanian maritime fisheries highlights lights and shadows, which are stressed in this section in order to provide a brief overview of both the current situation and the fishing sector's possible prospects.

Food for thought comes first and foremost by the analysis of some characteristics of the human factor and the work market.

The low *level of education* of the fishers interviewed represents a serious weakness affecting the work force used. This situation is not typical of Albanian fisheries, as it very frequently characterizes also other countries' fishing sector. On the other hand, the same Albanian general picture is not characterized by a high degree of school attendance: INSTAT⁵⁰ data show that only 65.8% of individuals between 3 and 22 attended school in 2001, yet with a remarkable difference between urban areas (84.2%) and rural areas (54.5%).

The low level of schooling registered among those working in the fishing sector is clearly hampering development and the introduction of any form of innovation in the sector itself and in business management. On the other hand, sector measures cannot but include a cross-cutting action aimed at improving the level of education and vocational training of those working in the sector, although the effects of said action can stretch over the medium-long term.

The issue of *professional education and advanced vocational training* is linked to that of schooling. It should be stressed here that, although most of the fishing professionals interviewed express the need to acquire further knowledge on fishing techniques, the analysis of the answers given restricts the boundaries of this required area of knowledge and identifies it with the fishing activity alone. This limited view is believed to be symptomatic of a certain close-mindedness of the individuals interviewed, who are only concerned with the knowledge of the techniques necessary to "know how to fish"; this close-mindedness harms both the qualification of each category within the crew and possible future prospects of change and

⁵⁰ See <http://www.instat.gov.al>.

improvement of the workers' role. It should be noted on the other hand how the issue of specialization for the sector's work force is felt as one of fisheries' main weaknesses by all professional categories, although it is much more widespread within the crew's operational categories, who appear to be more sensitive to the need for a higher degree of work force specialization in comparison to the other roles of the crew.

These are also very important aspects to consider in the implementation of the necessary professional education and advanced vocational training policies, in order to increase the awareness of all those working in the sector on the needs to learn and above all involve them in training programmes.

As for the *work market*, a fair degree of mobility between the various maritime districts of those interviewed, especially among skippers and motor mechanics as these categories of workers are likely to be the most demanded ones because of their skills as well as the ones who are best able to move easily between the various local work markets. This mobility has been registered in almost all of the cases within the four Albanian maritime districts.

Small fisheries professionals are more anchored to the local fishing reality than fishers working on big vessels: difficulties on the local fishing markets, specific size of fleet and maritime districts, and search for better earnings can be the decisive causes of workers' mobility towards bigger fishing vessels. The local anchorage of workers to small-scale fisheries can be a weakness, as this segment of the fishing work market is much more exposed than workers active on big vessels, especially when the maritime districts undergo difficult economic phases. Albanian experts believe that said mobility of workers between the various districts refers in particular to the period before the country's transition towards market economy, while mobility has decreased after the 1990s.

Measures supporting the work market or with effects on it must pay attention to the different degree of mobility characterizing the two fishing work market segments and the various professional categories on board. If the objectives of public measures for the support of the work market include the aim to promote the encounter between supply and demand, the support of mobility between the districts can be a political choice, which should be pursued with measures adequate to the local fishing realities.

Mobility between the districts does not go hand in hand with a similar degree of *mobility between sectors*. The fisher job is the first job done by 68% of those interviewed, who are mainly in a mature working age.

The fact that the fisher job is for many people the only one done is only partly due to *family tradition*: indeed, only 30% of the individuals interviewed carries out the same working activity as their father, while the remaining 70% has not inherited their father's job, which consists in activities carried out in sectors other than the fishing one. The lack of a strong link between the individuals' first working experience and intergenerational transfer is also clearly evident: there is an equal number of cases in which the fishing professionals are at their first job and have inherited it following family tradition and situations in which those interviewed are not at their same job and do not show any family tradition; furthermore, 40% of fishers are not carrying on a family activity, even if they are at their first job in the sector. It is generally believed that the continuity of family tradition is quite a recurring element for the characterization of the fishing sector; therefore the Albanian situation is specific of the country. This Albanian peculiarity can be explained by personal migration movements abroad and inside the country: following said movements, a large number of fishers were led to

migrate abroad, while the resulting lack of work force in the fishing sector was offset by labour force of rural origin coming from other areas in the country.

Particularly interesting results emerge from the survey on the initial motivations given for the maritime fishing activity, as well as on current reasons and on future working prospects in the sector.

Arguments in favour of the *current reasons* why the fishing sector shouldn't be abandoned confirm the picture outlined for the *initial motivations* to carry out the fisher job: in both cases, the economic motivation expressed by 64% of the sample is prevailing. Although the economic satisfaction referred to by the individuals interviewed should be considered in relative terms in comparison to other possible job opportunities, it is important to highlight the importance that this circumstance attributes to the fishing sector within the framework of the economic and employment situation of local fishing ports.

As for medium-term *working prospects*, a very high percentage of fishers think about maintaining their current job: over 80% of those interviewed do not think about changing job in the future. The positive element as for the attachment to the fisher job is partly put back in its right perspective when looking at the motivations of those who do not think about changing job in the future: the two main reasons for staying in the sector are the lack of better working opportunities (for 36% of those interviewed) and the lack of any alternative (31%); one fourth of those interviewed believe that family tradition is a strong tie keeping them anchored to the sector for the exercise of the fishing activity; though indicated as the last factor, economic satisfaction too appears among the reasons why no future job changes are foreseeable.

A limited degree of mobility between the sectors, the exercise of the fishing activity as first and only working activity for those interviewed, entering the sector at a very young age are all factors, which lead to the acquisition of professional skills that are so specific so as to hamper people from abandoning the sector. The lack of entry barriers and the presence of obstacles when leaving the fishing work market are indicative of a more or less strong dependence of fishing professionals on the sector's economic trends, as well as of the frailty of the general socio-economic tissue. These two phenomena – dependence on the sector and general economic frailty – would require the implementation of an integrated working policy, rather than a sector and locally tailored one.

As for the economic conditions regulating the *working relation*, no serious reasons for dissatisfaction or conflicts seem to emerge in spite of the high number of "no answers". This is a definitely positive aspect for the quality of relations between employers and employees. In the opinion of those interviewed, aspects to change include first and foremost the modalities of distribution of sales' revenues; secondly, stress is made on working conditions, expressly work duration and holidays; and the third aspect signalled is wage variability, which is a direct consequence of the sales-anchored mechanism to determine pay.

The strong differences emerging from the answers given by fishers working on small fishing boats or big vessels signal a higher degree of satisfaction with the working relation, characterizing the former workers in comparison to the latter: according to 43% of the small fisheries sample, no aspect should be changed, while the corresponding percentage for fishers working on big vessels is 13%.

With reference to the perception of the *sector's problems* for maritime fishing, a first conclusion that can be drawn by the results is that fishing professionals are unable to distinguish the national from the local sector sphere: those interviewed identify the national with the local sector, as they are directly involved in the particular issues of their specific fishing reality without an overall view of the sector.

A highly specific view of the fishing sector's problems, both at a national and at a local level, is clearly highlighted also by the problem cases registered, which are strongly centred on few main issues. Besides the problem of the high cost of fuel – a critical issue at the time of the survey – the sector's second economic problem, which has been specifically indicated by two thirds of those interviewed, is linked to the market sphere and is represented by the competition of imported products on internal markets.

No significant differences seem to emerge as for trade relations with *distribution markets*, with this being also confirmed by the remarkable stability in the relations with buyers; yet on several occasions complaints are raised as for the relevant contracting weight of wholesale trade on the one hand and the limited role played by local fish markets on the other.

The *picture of local fishing realities* is quite negative, judging from the perception that the people interviewed have of the current and future economic situation in their respective maritime district.

The major *difficulties* influencing the overall negative opinion on the trend of the local fishing economy are to be found within the field of sectorial policies, followed by the environment and market fields.

As for sector policies, although only few individuals provided specific arguments on the matter, the main causes indicated for this problem area consist in the lack of public support to the sector⁵¹ as well as in the lack or inadequacy of regulations and controls.

Three main types of problems have been identified with reference to the environmental sphere: the most important type of problems registered is linked to the quantity of available resources (scarcity or reduction), which is in turn reflected in a minor quantity of catch unloaded and in more burdensome fishing operations; the second type of problems is linked to the “bad” quality of available resources, which is then reflected in the minor quality and lower trade of catch; finally, a third type of problems again linked to resources is represented by the inadequate stock available, both from a qualitative and quantitative point of view, as resources are damaged or suffer the negative effects of illegal fishing and norms' violations.

Finally, the problems highlighted in the market sphere refer first and foremost to the low quotations of catch, then to the lack of wholesale markets and the corresponding dependence on wholesalers in determining market prices; as for import-export trade, fishing professionals mainly complain about the competition from imported products and the low quotations of their product destined to foreign markets. Specific problems are raised also with reference to the sardines' market owing to the product's low quotations and the strong competitiveness of foreign products. The Albanian fishing sector's trade problems are expected to be mitigated

⁵¹ It should be noted, however, that an issue like the one referring to the cost of fuel, which is cause for particular concern for many fishing professionals and may have influenced the perception of the sector's support, was solved in 2003 thanks to the adoption of public support measures. Again with reference to public policies, it should be finally considered that thanks to the intervention of the World Bank the restructuring of the four Albanian ports has recently started for the widening and modernization of the ports' infrastructures.

thanks to the recent start of the works for the implementation of a public-private project for the construction of a wholesale fish market in the maritime district of Durres.

A disjointed analysis of the information on the problem areas by each single maritime district shows some specificities: the problem of resource availability is more felt in Sarande and Vlore; sector policies are mainly cause for concern among those interviewed in Durres e Shengjin; problems linked to market trends are registered especially by fishing professionals in the maritime districts of Durres and Sarande; finally, the problem of old fishing vessels is registered especially in Vlore, although it is not exclusive of this fishing port⁵².

As for different size of fisheries, the major difficulties perceived by fishers working on fishing vessels shorter and longer than 12 metres refer on the one hand to the higher frequency with which the issue of resources is felt by the those working on smaller vessels; on the other hand they consist in the greater importance attributed to market problems by fishers working on board of bigger vessels.

As for *service availability* in the maritime districts, the people interviewed express a negative opinion on the situation of the districts investigated. The previous consideration is confirmed by the fact fishing professionals complain about various deficiencies in the services that they consider to be *strategic* in their own fishing ports. Furthermore, in view of the sector's long term development, the focus should be more on essential rather than strategic services, as essential services are the prerequisite for the exercise of the fishing activity as early as from short term perspective of development. The most widely felt problems are linked to the lack of technical services for fishing vessels, which makes the fishing activity very difficult to carry out. Services of business counselling and assistance by the public administration are further problem areas where deficiencies are registered.

The focus on each maritime district's strengths and weaknesses leads to a clear-cut differentiation between these two fields. Strengths mainly consist in some "immaterial" components present in the local fishing communities, while weaknesses are represented by the lack of services and facilities supporting the fishing professionals and the markets.

The picture of *strengths* is not particularly significant on the basis of the answers directly given to the question. The main strength consists in the presence of a spirit of collaboration between fishing professionals, which has positive effects also on other areas of activity: it first of all influences cooperation on the capture areas, then working conditions and generally also other aspects involving local fishing professionals. The presence of widespread cooperative behaviours in fishing areas is not however such, so as to ward off competition on capture areas, with this competition being highlighted by small fishers as a problem area for the relations with other fishing vessels.

⁵² The following table shows the percentage distribution of fishing vessels by construction year in the various Albanian maritime districts. As shown by the table, the problem of old fishing vessels with its related maintenance problems can be clearly seen by the fact that about 50% of the Albanian fleet was built before the 1960s. Vlore's situation is without doubt worse than in the other big Albanian maritime district of Durres, however the most critical problems are registered in the smallest fishing ports. (Our processing of data from the Albanian Fleet Registry Registry).

Port	Year of construction					Total
	'41-'50	'51-'60	'61-'70	'71-'80	'81 onwards	
Vlore	4,7	17,2	23,4	23,4	31,3	100,0
Sarande	14,3	7,1	35,7	17,9	25,0	100,0
Shengjin	7,4	33,3	18,5	22,2	18,5	100,0
Durres	5,5	15,1	15,1	32,9	31,5	100,0

Besides the above mentioned strengths emerging from the answers to the question, other strengths of the maritime districts can be deduced by the survey's general results. Two important elements should be highlighted here. Unlike the situation that is generally registered for other countries' fishing sector, the sector's work force does not show a high average age⁵³. This aspect is important from a medium-long term point of view, as a young work force can be a huge asset in terms of human resources for the Albanian fishing sector, although it definitely requires higher professional skills. This is also to be considered in view of the modest role played by family tradition, as well as of strong presence of young people who start working in the sector as their first working activity and do not express the willingness of changing their current job. This final consideration is linked to a second strength of the Albanian fishing sector, namely the recurring economic motivation, which attracts and keeps work force, not only when there are no other job and income alternatives, but also where these alternatives exist.

As indicated above, the most important aspect highlighted among the *weaknesses* is the lack of specialized work force and the low level of training for the sector's workers; these aspects are followed by the lack of services, the insufficient/inadequate system of market organization⁵⁴; and finally, in spite of the spirit of collaboration perceived as a strength of one's own fishing district, cooperatives are instead indicated as one of the main weaknesses. These weaknesses are inherent to sector and territorial reality, which is undergoing a phase of growth that is not adequately accompanied by organizations, infrastructures and networks for the support of the activities before and above all after said activities.

When strengths and weaknesses are disjointed according to the size of the vessel where fishing professionals work, small fishers tend to indicate that their maritime districts do not present any strengths and in doing so their opinion is much more severe than the one of fishers working on bigger vessels: as for weaknesses, small fishers complain more than the others about the problems linked to the availability of services, market organization and the availability of credit; fishers working on bigger vessels, instead, are much more sensitive towards issues like the availability of specialized work force, the support by local institutions and cooperative facilities.

⁵³ Data on this matter on Italy are provided for some maritime districts in Forleo (1998). It should be checked, however, if the implementation of the fishing sector's community policy has led to a lowering of the average age for those working in the sector.

⁵⁴ Attention should be drawn here on a previous footnote concerning a project by the World Bank for the restructuring of port infrastructures and construction of market facilities.

The picture described above of the Albanian fishing sector, with its lights and shadows, offers interesting hints for the implementations of a public intervention programme, aimed at mitigating the weaknesses and further highlighting the strengths of local realities. The objectives and results of this survey did not consist in putting forward suggestions as to the contents and tools of public action; still, it is believed that a useful contribution has been made to enrich the fishing districts' knowledge base, especially at a local level, without which a policy of sector intervention cannot be adequately defined and managed.

ANNEX I: The structure of survey questionnaire

The necessity to have socio-economic information in order to realize the objectives of the research, not available alike among the official statistical system has required the development of a direct query among the Albanian maritime.

Aiming at achieving the collection of the information, was considered necessary to proceed with interviews among local fishery workers carried on the base of a questionnaires structured in such a way to simplify and standardise the operation of revealing the data.

For the three scales of the of the socio-economic phenomena – the individual sphere, the sphere of the company and of the crew, the maritime sphere – were predisposed three questionnaires submitted in sequence to the sample of interviewees. The interviewed persons were the same for all the three questionnaires in such a way to keep the coherence of the answers ahead the same subject and achieve a connection between the three questionnaires.

The questionnaires have been tested continuously “on the desk” and “in the ground” in order to search the problems of the questions difficult understanding, of difficulty in the selection of the answers, of eventual duplications of questions that have bee not motivated with the exigencies of data validation. It is opted for a questionnaire structure with questions that foresees predominantly closed and semi-closed answers simplifying and standardising the answers. This structure was chosen for many reasons: to reduce the timing of the execution of the questionnaire; to reduce the risks of error and fall of attention in answers; finally, to make easier the insertion in the data base, the control of quality of the information and to facilitate the statistical treatment of the data.

According to the specific content, the question require predominantly unique answers or multiple choices but with a maximal number of the selectable options. Furthermore, it is about questions that namely presuppose a binary answer (of the Yes/No and present/not present type), but in certain cases require also the indication of a weight of importance to be attributed to the chosen options.

The first typology of the question is structured aiming to allow a statistical analysis of the data based on the distribution of the absolute frequencies and percentages, to make comparison within the entire sample or within each binary modality in the presence of chained questions (for example, in relation to Yes or in relation to No answers).

The second typology of question was foreseen in presence of questions with multiple answers for which it was considered interesting to know the importance ranking attributed by the interviewees to each chosen option. In such a way, for such questions the statistical analysis, beside being carried on the distributions of frequency, is based on the rank of the average points drawn by each option -provided reporting the points from each option in the entire of the answers to the frequency with which the option is chosen-.

The three survey questionnaires, each for their field of investigation, with the questions posed to the people interviewed are presented below. For sake of brevity the answer modalities suggested to the interviewed for each question are not listed, with said answers being structured mainly as closed answers.



TASK 3 - Standardised socio-economic data collection on sampling analysis

3.1 QUESTIONNAIRE ON PERSONAL DATA

Data	Interviewer
Interviewed	

I.1. Age ____ Status: single married Children (N°) ____ Place of birth _____

I.2. (If place of birth different from maritime district) Arrival year in the maritime district _____

I.3. Which is your highest scholar degree (select the level and specify the kind of school)?

I.4. Which is your position in the crew?

I.5. Could you briefly describe what is your job on board?

I.6. Do you have other tasks when the vessel is not fishing?

If YES, which ones? (multiple choices)

I.7. Which matter other than fishing techniques do you think are absolutely necessary for a young fisher to know? (multiple choice)

If NONE/ I DON'T KNOW, why? (max 2 choices)

I.8. How many people are there normally in your crew? _____

I.9. Does this number change during the year?

If YES, from _____ people into season _____ to _____ people into season _____

If YES, why? (max 2 choices)

I.10. Have you ever fish in other maritime district?

If YES, where?

I.11. This is your first job?

If NO, which were the previous ones? _____

I.12. Do you follow your father's job? If YES, how old were you when you began fishing activities? _____

If NO, in which sector of activities did/do your father work (multiple choices)?

I.13. Why did you decide to do this job (max 2 choices)?

I.14. Have you ever search for a different job in the past?

If YES, why (max 2 choices) ?

If NO, why (max 2 choices)?

I.15. Have you ever had other job opportunities?

If YES, in which sector of activities (multiple choices)?

If YES, why don't you leave the fishery sector (1 choice)?

I.16. How do you spend your spare time (max 2 choices)?

I.17. Do you have another part time job?

If YES, could you answer the following questions?

Sector of activity

Time spent: hours and % of total time devoted to part time job monthly _____% _____

Period during the year _____

Reasons (max 2 choices)

% of part time income on total labour income _____

I.18. Does your wife work?

If YES, why she decides to do it (max 2 choices)?

I.19. Household members

I.20. Do you think your family is satisfied of your job?

Why (max 2 choices)?

YES		NO	
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I.21. Do you think you will change job in the next future (1-3 years)?

If YES, in which sector?

If YES, why (max 2 choices)?

If NO/DON'T KNOW, why?

I.22. How much do you save of your monthly salary? (% share of savings on salary)



TASK 3 - Standardised socio-economic data collection on sampling analysis

3.2 QUESTIONNAIRE ON CREW WORKING CONDITION AND FISHING STRATEGY

Data	Interviewer
Interviewed	Position in the crew

I. Working condition

I.1. Crew composition:

N° _____ Age youngest _____ Age oldest _____ Women _____ Men _____ Teen-ager _____

I.2. Why it's preferable to have women on board (max 2 choices)?

I.3. Why it's preferable to have teen-ager on board (max 2 choices)?

I.4. Do you have relatives in crewmembers?

If YES, N° _____ Relationship (1st, 2nd, 3rd degree) _____

Position _____

I.5. Have you ever had some risk at sea?

If YES, which kind of risk?

I.6. Have you ever had some occupational disease?

I.7. Do you have any insurance policy?

If YES, it's a public system or you privately insure?

If YES, which kind of events it covers?

If NO, why?(1 choice)

I.8. Do you have any pension?

If YES, of which kind?

I.9. There's a public fishers employment contract?

If YES, which parts of the contract it would be necessary to modify and why? (multiple choice)

I.10. Are there foreign people on board in your maritime district?

If YES, where do they usually come from? _____

They are fixed or seasonally employed? Fixed Seasonally

Which is their more frequent position in the crew?

Why it's preferable to have foreign people on board (max 2 choices)?

How is the relationship with foreign people on board?

I.11. Are there seasonal workers in your crew?

If YES, N. of seasonal workers _____

Period of time (length and period during the year) _____/_____

Nationality _____ Place of Origin _____

Position in the crew

I.12. FOR OWNER ONLY: Which kind of activities other than crew members you need in your maritime district and how many workers?

II. Fishing strategy

II.1. Who take the decision about the intensity of fishing (where, what, when, how much go fishing)?

If CREW, all together or some specific person?

II.2. What determines the choice of catching zone? (max 3 choices)

II.3. What determines fishing effort' intensity? (max 3 choices)

II.4. Are there work aspects you discussed with crewmembers?

If YES/RARELY, could you tell aspects more often discussed together? (max 3 choices)

II.5. In your opinion, which are the two main reasons of your job?

II.6. Are you member of some co-operative?

If YES, of which kind?

II.7. How is the economic situation of the co-operative?

III. Salary

III.1. Shared cost

III.2. Which is the more usual kind of payment?

Which are the more usual frequency and time of payment?

Does the salary is fixed or change? Fixed Variable (min £. _____ max _____)

What about the comparative profit/salary from fishing firm/job with employee in public and private sector?

Options	Public sector	Private sector
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III.3. Which aspects would you change in the relationship owner/crew? (max 3 choices)

III.4. FOR FISHERS ONLY: Do you invest capital into the fishery firms?

If YES, in which form?



TASK 3 - Standardised socio-economic data collection on sampling analysis

3.3 QUESTIONNAIRE ON MARITIME DISTRICT CHARACTERISTIC AND RELATIONSHIPS

Data	Interviewer
Interviewed	Position in the crew

I. Maritime district characteristics

I.1. How many vessels fish in your district?

I.2. Which is the present economic situation of fishery in your maritime district?

Which are the problem area (explain the choices)? (multiple choices)

I.3. Which are future tendencies?

Which are the problem area (explain the choices)? (multiple choices)

I.4. Do you suggest people becoming vessel owner/fisher (choice / according to interviewed crew position)?

Why (max 2 choices)?

YES		NO	
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I.5. Do you have any problems with other fishing VESSELS?

If YES, on which topics problems are more frequent? (max 2 choices)

I.6. Do you have any problems with other CREWS?

If YES, on which topics problems are more frequent? (max 2 choices)

II. Maritime district relationships

II.1. Are there any labour unions in your maritime district?

If YES, of which kind?

How many labour unions there are?

II.2. Are you member of some local labour association?

If NO, why?

If YES, with which frequency do you contact your union association?

II.3. Which is your degree of satisfaction of the following association activities? (from 1 to 5)

II.4. There's any places or institutions in which you meet your colleagues?

If YES, which ones?

What do you do? (max 2 choices)

If NO, why? (1 choice)

II.5. There are some public initiatives your category organises in your maritime district?

II.6. Which local institutions do you contact frequently and why?

II.7. Which institutions have more power in managing fishing sector and take decisions in your district?

Do they have some enforcement power?

III. SERVICES

III.1. FOR OWNER ONLY: Which services you have in your district do you think are strategic for your work? (Max 3 choices, ordered for rising importance)

III.2. And which services are absent in your maritime district?

III.3. In which other maritime district you buy services lacking in your district?

IV. TRADE RELATIONSHIP

IV.1. Do you sell fish product to the same buyer?

IV.2. Which aspects do you consider the most important in trade relationship? (2 choices ordered in growing importance)

IV.3. Put in order of market strength held in your district the following trade operators:

IV.4. Is the fish market in your district an efficient structure?

If YES, why?

If NO, which are the main problems (3 choices ordered in growing importance)?

IV.5. Which kinds of market operators are authorised in the local fish market?

IV.6. Could you estimate the percentage of the total local catch sold in the fish market?

IV.7. Where do you search for local information on prices, species demanded, quantity sold, ...?

IV.8. Are there market operators coming from outside maritime district?

If YES, from where?

Of which kind?

And why?

IV.9. Which are the main economic problems facing fishing sector in your country (3 choices ordered in growing importance)?

IV.10. Which are the main economic problems facing fishing sector in your maritime district? (3 choices ordered in growing importance)

IV.11. Which are the main strength factors of your maritime district? (3 choices ordered in growing importance)

IV.12. Which are the main weakness factors of your maritime district? (3 choices ordered in growing importance)

IV.13. Is your maritime district differently organised from others?

If YES, what is better than in your?

IV.14. How would you define the kind of inter maritime district relationship?

IV.15. Which are the main aspects/factors your maritime district exchange with other district? (max 3 choices)

V. LAST SECTION

V.1. Do you know FAO?

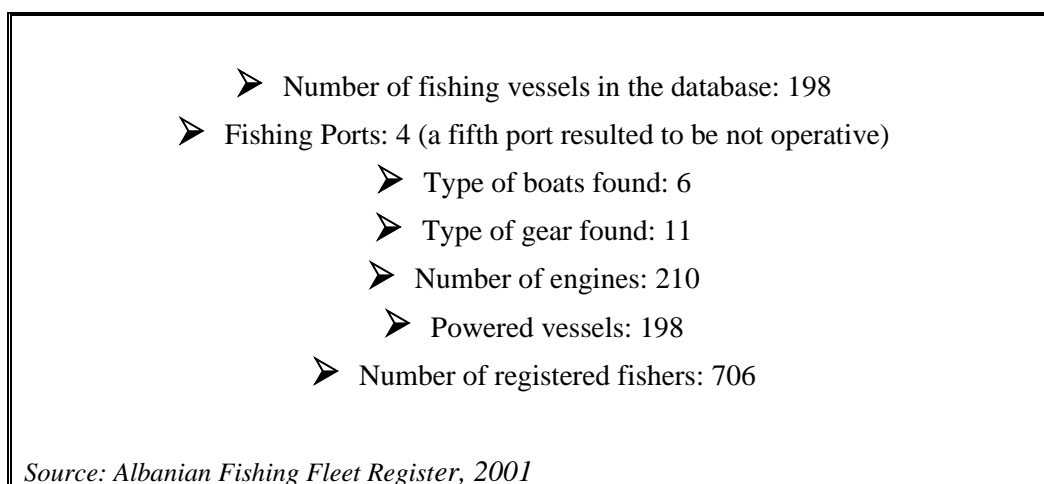
V.2. Do you know the AdriaMed Project?

V.3. Do you know the CCRF?

ANNEX II: The sample design

For a better comprehension of the results, it is appropriate to provide some information about the methodology followed in the sample design and stratification and to give some data about the sample of the people interviewed.

Before considering the sample distribution it is useful to provide a brief preliminary outline of the Albanian fishing sector. The scheme below indicates some data drawn from the official Albanian Fishing Fleet Register (source ALBASTAT, year 2001).



We define the sample dimension of the base of a 30% percentage of the total population of fleet and fishers: that totally amount to 59 vessels and 212 fishers.

Then the simple was stratified according to three variables, the port, the fishing gear, the vessel length.

After having calculated the distributions of fleet and fishers by port, vessel length and type of gear we apply the 30% percentage to each distribution so to design the sample in a way that the same percentage was guaranteed in all the strata.

The total number of fishers who replied to the questionnaires was 187, which is more than 26% of the total number of fishers resulting from the Albanian Official Register in 2001 (706 units).

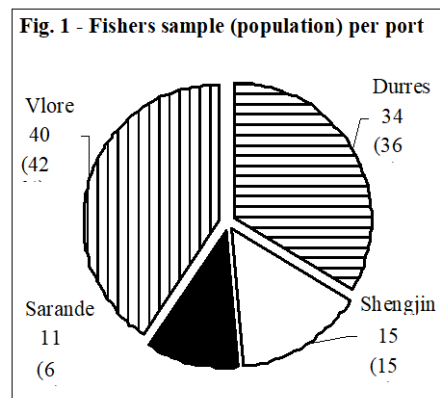
The criteria with which the sample will be examined refer to stratification variables -the port, the length of the vessels and the type of gear that is mainly used -. The structure of the sample will be illustrated by analyzing the sampling composition in terms of vessels and fishers. This composition will be compared to that of the total fleet and fishers population.

The sampling design by port

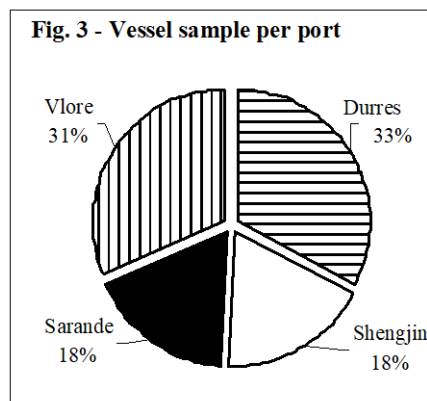
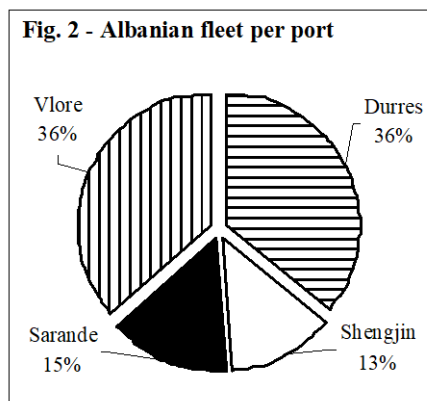
Before the presentation of the four Albanian marines' profile provided in the following pages, some information should be given on the sampling design by fishing port. The sample composed by the interviewed people in the four marines investigated is shown in Figure 1: most of the interviewed people come from the biggest marines Vlore and Durres.

The higher absolute figures do not however give any indication on how relatively representative the sample is, compared to its reference universe. It namely emerges from the comparison that the sample division faithfully reflects the overall distribution of Albanian

fishing professionals between the ports of Durres, Shengjin and Vlore (the percentage value is indicated in brackets in Figure 1); therefore the sample division is equally representative of these three ports. Greater sample coverage can be observed for the Sarande marine⁵⁵.



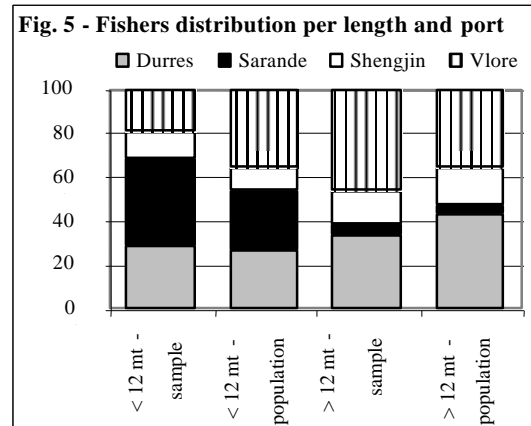
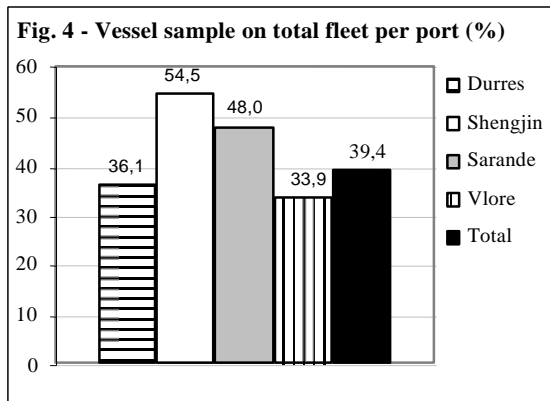
In order to understand the sample size in terms of fleet, it should be considered that the interviewed people work on board of 67 fishing vessels and are divided in the various marines according to the percentages indicated in Figure 2. This is clearly a homogeneous distribution between the various marine, which is based on the size of the fleet: slightly more than 30% in the big marines of Durres and Vlore and 18% in the smaller ones of Sarande and Shengjin respectively. This division reflects, though with some smaller variations, the overall distribution of all fishing vessels registered in Albania⁵⁶; there are totally 198 fishing vessels, 170 of which are the active ones and have been taken as a reference base (Figure 3).



The higher weight of Durres and Vlore within the sample, both in terms of interviewed people and fleet, reflects also the absolute size of the two fishing ports; conversely, the minor weight of Shengjin and Sarande within the sample is due the smaller size of these two ports. As already said, in order to assess how representative the respective local samples are, the number of sample units by each port was related to the number of fishing vessels registered in each marine. The sample accounts for about 40% of the fishing vessels totally (Figure 3).

⁵⁵ The population of employed people refers to ALBSTAT data, which refer to the minimum number of fishers on board of by vessel of the active fishing fleet.

⁵⁶ Source: ALBSTAT, 2001.

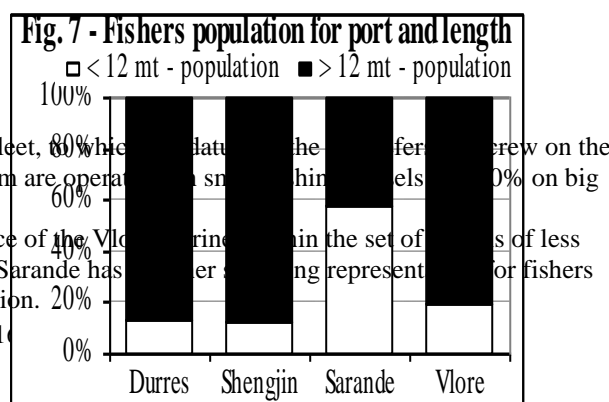
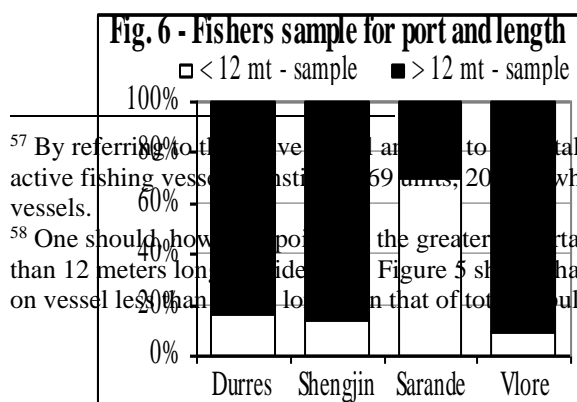


How representative the sample is, compared by fishing port, shows slight differences between the marines, yet it always very high: in comparison to the average, Shengjin and Sarandë are more representative, whereas the other two fishing ports show values that are slightly below the average.

The sample design by vessel length

As far as vessels length is concerned, on the total number of official fishers in 2001 (706), 17% is registered on vessels with length less than 12 meters and the remaining 83% (587 fishers) is registered on vessels with length more than 12 meters⁵⁷. Fishers distribution is linked to the structure of fleet in terms of vessels length. At this regard, subdividing the fleet by length classes (<12 mt and >12 mt), the number of the boats with length less then 12 mt is 59 (30%), and the bigger boats are 139 (70%). It is important to underline that the reported data refer to the total number of vessels and fishers in the sector as stated in official registers. The presence of boats that are operating without being registered, because they cannot be measured officially, lies outside the field of this study. Since this case characterizes mainly the small-scale fisheries segment, the official data underestimate the size of the segment; for that reason, the collected sample may have a lower representation in relation to the real situation than in relation to that officially reported.

After this clarification on the data reported above regarding the whole structure of the Albanian fishing sector, a few elements are provided to appreciate the statistical representation of the survey sample. First, the sample is examined according to the dimension of the vessels (Figure 5). The sample of small-scale fishers is organized in the four marines, based on a distribution in which the greatest importance is placed on Sarandë and Durrës; as far as fishers operating on boat greater than 12 mt long the sample is mainly characterized by Vlorë and Durrës. The sampling design reflects quite well the distribution of Albanian fleet between the small and the large vessels that are registered in the four marines⁵⁸. The sampling distribution of fishers based on vessels size in the four ports does not differ much from that of the fisher population registered (Figures 6 and 7).

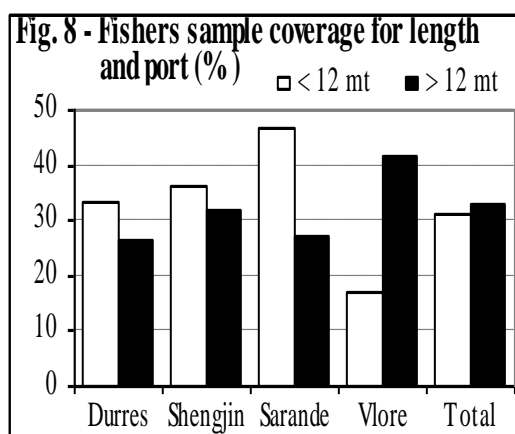


⁵⁷ By referring to the active fishing vessels, 69 units, 20% on small vessels and 80% on big vessels.

⁵⁸ One should show the greater importance of the Vlorë marine in the set of fishers of less than 12 meters long vessels. Figure 5 shows that Sarandë has a higher representation for fishers on vessel less than 12 meters long.

When comparing the figures, one sees a strong similarity between the sampling and the overall population for the marines of Durres and Shengjin that, therefore, become better represented by the sampling structure. Some moderate deviation results with reference to the other two marines, Sarande and Vlore.

Secondly, one may examine the significance of the sample coverage per port and size of the vessels. The sample of people interviewed was 31% and 33% of total active fishers, respectively, on vessels of less than and more than 12 meters⁵⁹ (Figure 8).



The sample coverage on the basis of vessel size and marine proves to be quite similar in both classes of vessel length for the Shengjin and Durres marines. In the Sarande marine, the sample representation is greater for small vessels; in the case of Vlore, however, it is greater for the large vessels.

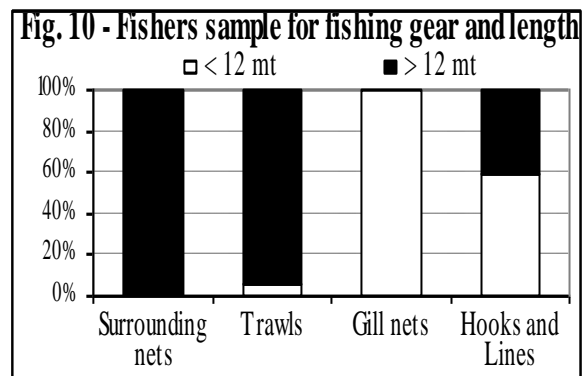
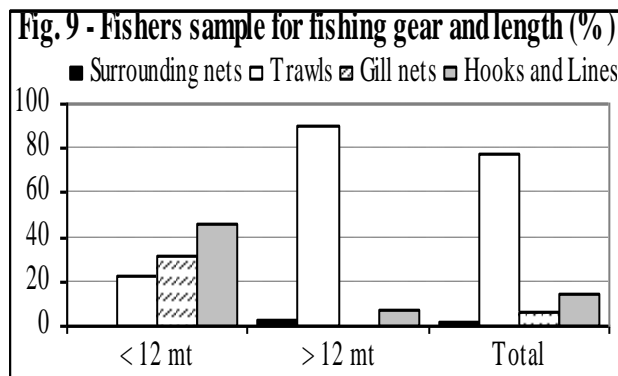
In conclusion, it may be emphasized that the sample coverage refers to officially registered vessels, so that the coverage could be less in terms of operating vessels, especially in the small-scale fishery segment.

The sample design by fishing gear

One further aspect useful to get some insight on the Albanian fishery sector is the type of fishing that is most commonly practised. Data refers to the prevailing gear registered in the Albanian Official Fleet Registry. Vessels may have registered secondary other than the prevailing gear that it is not considered in the following analysis.

⁵⁹ It is emphasized that because of the lack of separate data on vessel size and fishing gear, the population of individuals in charge was measured on the basis of a minimal number of crew members. The choice of taking as a reference the minimal (and not the maximum) number of crew members, a choice that leads to an overestimation of the sampling influence, was determined by the presumed lower variability of the minimal datum of individuals in charge in the sector rather than in the indication of the maximum number of individuals on board.

In regard to the typology of registered fishing gear, the sample consists mainly of individuals (63%) dedicated to fishing with trawls (Figure 9).



As expected, such a typology of gear is present mainly among big vessels whose sample contains more than 75% of fishers operating with bottom otter trawls. Of minor importance, as already known, is the gear in small-scale fishing: the sample of fishers operating on vessels whose length is less than 12 meters refers mainly to vessels equipped with hooks and lines (50%) as well as gillnets (31%).

Such considerations are confirmed by the reading of figure 10 where the sample is developed not by vessel size, as in the previous paragraph, but by registered gear typology. Fishers who use surrounding nets in all cases are on board of extremely large-sized vessels; the same is for fishers who use trawls and bottom trawls. Conversely, fishing operators with gillnets are on vessels whose length is below 12 meters. On the other hand, the design of the sample reflects the characteristics of local fishing and its distribution in the various fishing systems⁶⁰.

As far as the boats with length less than 12 meter are concerned, the distribution by type highlights the predominance of gill-netter (71%), whereas trawlers appear to be the most frequently used (83% of the total) in the length class of more than 12 mt (Table 1).

Similar considerations emerge when one considers the fishers' distribution by type of fishing practised by the vessels. Table 2 presents the whole distribution of fishers by vessels type and length classes. On the total fishers' population, 72% of fishers is on vessels that are equipped with fishing trawls. In the small scale fishing segment, the presence of fishing operators with gill netter (70%) prevails, whereas in the large vessel segment, the fishing operators mainly use trawls.

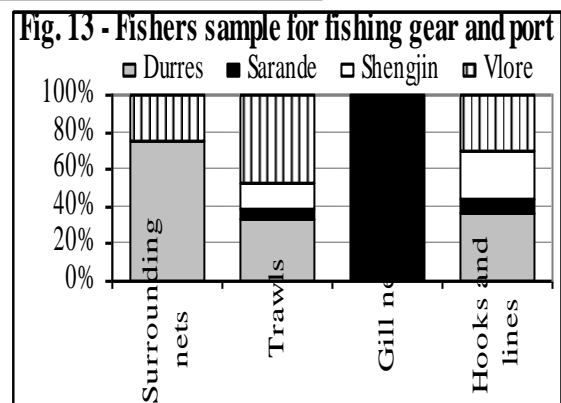
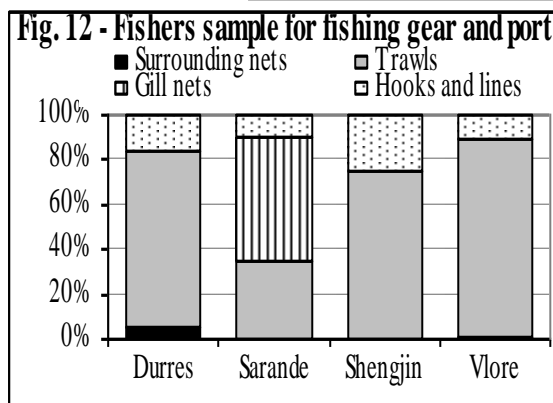
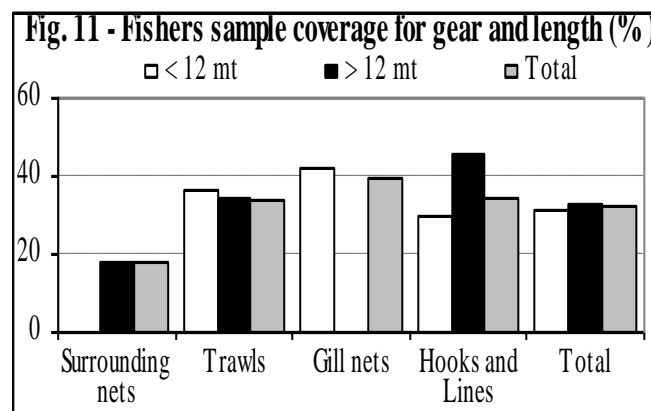
⁶⁰ Source: ALBSTAT.

Vessel Type	<12 m	>12m	Total
Purse Seiners	0%	1%	1%
Seiners Other	2%	4%	4%
Trawls	10%	83%	62%
Gill nets	71%	9%	28%
Long liners	8%	1%	3%
Multipurpose	7%	1%	3%
Unknow	2%	0%	1%
TOTAL	100%	100%	100%

Vessel type	Number of fishers				Total number	Total %
	<12m	<12m	>12m	>12m		
		%	%			
Pellagjike/Purse Seiners	0	0%	4	1%	4	1%
Rrethim/Seiners Other	2	2%	31	5%	33	5%
Fundore/Trawls	9	8%	502	86%	511	72%
Selektive/Gill nets	83	70%	45	8%	128	18%
Me grepa/Long liners	14	12%	2	0%	16	2%
Shumeperdoruese/Multipurpose	9	8%	3	1%	12	2%
E paditurUnknow	2	2%		0%	2	0%
TOTAL	119	100%	587	100%	706	100%

When one considers the sample distribution by fishing gear (Figure 11), the level of representation of each gear in the sample does not significantly diverge from the overall average of 32%, except for the weight⁶¹ of the surrounding nets, in the order of 20%.

Finally, Figures 12 and 13 show the fishers' sampling distribution and coverage with respect to fishing gear and marines. Figure 12 considers the distribution of fishing gear within the four marines, whereas Figure 13 illustrates the way in which the four marines are distributed within the individual gear typologies present in the collected sample. Fishers in the marines of Durres, Vlore and Shengjin deal mainly with trawl fishing, whereas in Sarande, the sample consists mostly of fishers with gillnets and bottom trawls.



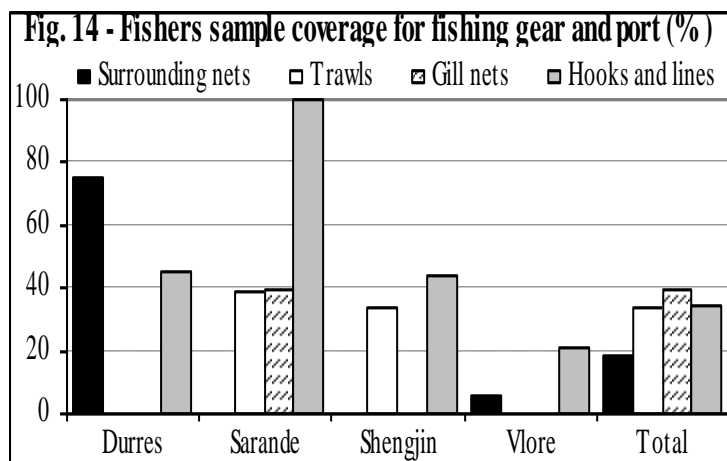
⁶¹ Greater than the overall coverage (32%) is the sampling weight for trawls (50%) on vessels below 12 meters and for hooks and lines (46%) on vessels longer than 12 meters.

The above-mentioned distribution of the sample of people interviewed, by port and fishing gear, is obviously linked to the structure of the local fleet. In this regard, as previously pointed out, the Albanian fleet is characterized by the abundance of trawlers (62%), followed by that of gill netters (28%). In regard to the each port, the structure of the respective fleet, based on the type of fishing practised, displays marked specificities: the Durres, Shengjin and Vlore fleets are characterized mainly by trawlers, whereas the Sarande fleet is mostly dedicated to fishing with gill netters (Table 3).

In relation to the degree of sample coverage⁶² (Figure 14), it must be emphasized that the lack of the collected units for some gear in some port should, in any case, be interpreted as a lack of units present in the local fishing population and not as an absence of collection. Apart from those situations, it is believed that a satisfying degree of sample significance has been reached, with points that are particularly positive: Durres, surrounding nets; Sarande, hooks and lines.

Table 3. Vessel distribution by fishing gear and port

Fishing gear	Durres	Sarande	Shengjin	Vlore	TOTAL	
					Nr.	%
Purse Seiners	0	0	0	1	1	1%
Seiners Other	5	0	1	1	7	4%
Trawlers	43	7	19	53	122	62%
Gill netter	15	23	7	10	55	28%
Long liners	5	0	0	1	6	3%
Multipurpose	6	0	0	0	6	3%
Unknown	1	0	0	0	1	1%
TOTAL	75	30	27	66	198	100%



⁶² As in the preceding analysis, the degree of sampling coverage is based on the number of people interviewed who belonged to each stratum of the sample with respect to the number of the analogous stratum of the population.

ANNEX III. The socio-economic data base

The data emerging from the direct investigation of the Albanian marine districts have been entered in a Microsoft Access archive, divided in the three socio-economic areas investigated: personal data, crew working conditions and fishing strategy, maritime district characteristics and relations. For each of the above mentioned three areas, the archive provides for a variety of functions. The database is thus structured so as to allow for entering, modifying, viewing and searching the information contained in it.

The entry, modification and visualization operations lead to a series of pages, which indicate the questions posed to the people interviewed and the fields where answers appear. The search inside the archive permits the selection of a specific record according to the name of the person interviewed and of the fishing vessel.

An information codification system was built in order to simplify the procedures necessary to enter data in the archive and interrogate it. The archive can be interrogated in two different ways:

The first way consists of the extraction of some simple statistics from the archive in graphical form according to a predefined structure. This applies to distribution according to age, role played by the crew and port of operation of the sample of interviewed people.

The second way foresees the possibility of extracting data from the archive in a customised way, thereby leaving the user the choice as to the information he/she is interested in. This information obviously refers to data collected on the basis of the questions included in the survey questionnaires, which refer to the personal data of those interviewed, the crew and the marine area. The results obtained are shown in tables and can be exported into document format. These results include the absolute and percentage occurrences of the single answer modalities for the information-question selected by the user. The customized interrogation can be carried out on the entire archive or on single sections through a filter, which can be introduced when extracting data and allows selecting the reference port where fishing professionals and fishers have been investigated.

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