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ANNEX 1: HISTORY OF THE EUROPEAN UNION

1946, September, 19	Winston Churchill, like Victor Hugo a century earlier, calls for “United States of Europe”.
1950, May, 9	Paris: French Foreign Minister, Robert Schuman, makes a declaration.
1951, April, 18	Treaty of Paris: Belgium, Germany, France, Italy, Luxembourg, and the Netherlands (the six) sign a treaty establishing the European Coal and Steel Community (ECSC).
1957, March, 25	Treaty of Rome: the Six sign treaties setting up the European Economic Community (EEC) and the Atomic Energy Community (EURATOM).
1960	Implementation of the European Social Fund created in 1958
1962	Implementation of the Common Agricultural Policy, first common European policy.
1965, April, 8	Treaty signed merging the three European Communities (EEC, EURATOM, ECSC), further on called the “EC”.
1968, July	Custom union implemented between the Six.
1973, January, 1	Denmark, Ireland and the United Kingdom join the EC.
1974	Heads of States and Governments decide to meet regularly as the European Council to deal with Community affairs and political co-operation.
1975	Establishment of the European Regional Development Fund (ERDF) and first Lomé Convention signed between the European countries and 46 developing countries from Africa, the Caribbean and the Pacific.
1979, March, 13	The European Monetary System (EMS) and the ECU (European Currency Unit) take effect.
1979, June	First election of the European Parliament (with a 5-year mandate) through direct universal suffrage.
1981, January, 1	Greece joins the EC.
1985, June, 14	Presentation of the White paper on completion of a single market.
1985, June	Signature of Schengen Agreement (Articles 30-31-32-34-62-63-66-95 of the Amsterdam Treaty) on free movement of persons between Belgium, France, Germany, Luxembourg and the Netherlands.
1986, January, 1	Portugal and Spain join the EC.
1986, February	Single European Act (SEA) enters into force, supplementing the Treaties of Rome. The SEA starts the deepening process within the EC, and sets January 1, 1993 as the completion date of the single market.
1988, March, 29	Presentation of the Cecchini report, quantifying the advantages of a single market and assessing the cost of non-completing Europe.
1989, December	Adoption by 11 Member States (without the UK) of the European Social Charter, and declaration approving the German reunification and integrating the Eastern Lander into EC.
1989	PHARE (Poland and Hungary Assistance for Restructuring of the Economy) program is launched. It was progressively extended to the other Central European Countries in the following years. (European Commission, 1998a)
1990	Opening of the intergovernmental conference preparing the EMU (Economic and Monetary Union) and the Political Union.
1991, October, 21	Agreement on setting up the European Economic Area (EEA) uniting in a single market the 380 million inhabitants of the 12-EC Member States and the seven countries (Austria, Finland, Iceland, Liechtenstein, Norway, Sweden, Switzerland) of the European Free Trade Association (EFTA).

1946, September, 19	Winston Churchill, like Victor Hugo a century earlier, calls for “United States of Europe”.
1992, February	Signature in Maastricht of the Treaty instituting the European Union, a far-reaching project, building on three major pillars: the EC (Custom Union, Single Market, Common Agricultural Policy, Structural Policy, Economic and Monetary Union), the Common Foreign and Security Policy, and the Co-operation in Justice and Home Affairs.
1993	The single market enters into force on January 1, and the Treaty on the European Union (EU) on November 1, after ratification by the 12 EU Member States.
1994	Hungary and Poland apply to join the EU in April.
1994, December, 9	Essen Summit and agreement on the strategy to bring Central and Eastern European States closer to the EU.
1995, January, 1	Austria, Finland and Sweden join the EU.
1995	Romania and the Slovak Republic apply to join the EU in June, Latvia in October, Estonia in November, Lithuania and Bulgaria in December.
1996	The Czech Republic applies to join the EU in January, and Slovenia in June.
1997, July, 16	The European Commission presents the Agenda 2000 outlining the EU strategy for the coming decade and dealing with challenges of the reinforcement of its policies and accession of new members within a strict financial framework. It also presents its opinions on the membership applications of the ten acceding countries. As a result, 5 first-tier countries are designated: the Czech Republic, Estonia, Hungary, Poland and Slovenia, along with a second-tier: Bulgaria, Latvia, Lithuania, Romania, and the Slovak Republic.
1997, October	Signature of the Amsterdam Treaty, modifying and supplementing the Maastricht Treaty.
1997, December, 12-13	European Council in Luxembourg: agreement reached on the enlargement process and the refocusing of PHARE.
1998, March, 1	Signature of the Memorandum of understating (MOU) between the European Commission, the World Bank, the EBRD and the EIB, on the co-operation of these institutions in the enlargement process.
1998, March, 30	The EU launches its accession process by providing individual Accession Partnerships to all ten acceding countries. These documents set out the priority areas where further work is needed, and indicate the assistance available from the EU.
1998, April	Formal negotiations for accession are launched with Poland, Hungary, the Czech Republic, Slovenia, Estonia and Cyprus
1998, May	Designation of the EU Member States respecting the Maastricht criteria for entering the EMU and adopting the Euro.
1998, November	The European Commission issues its reports on progress towards accession by each of the candidate countries.
1999, January	The Euro becomes the single European currency (UK obtained an “opting out” facility).
1999, March, 25	Heads of States and Governments, gathered in the Berlin European Council, ask Romano Prodi to set up a new Commission. They agree on a new Agenda 2000 package, concerning the financial perspectives for the period 2000-2006 and the draft regulations governing the Structural Funds, the pre-accession financial instruments for candidate countries and the CAP.
1999, May, 1	The Amsterdam Treaty (Part 1, Part 2) enters into force after ratification by the fifteen EU Members States.
1999, June	The Council adopts the new Agenda 2000 package.

1946, September, 19	Winston Churchill, like Victor Hugo a century earlier, calls for “United States of Europe”.
1999, October	The European Commission issues its second set of reports on progress towards accession by each of the candidate countries. The EC proposes to start negotiations with all of them, ending the distinction between the “first five”, already in negotiations, and “second five” countries, undergoing a screening process on implementation of all Acquis, prior to negotiations. Invitations to negotiate for Bulgaria and Romania are conditional.

The process of European integration showed a very clear acceleration during the Nineties, with:

- the deepening of the single market;
- its partial extension to Iceland, Norway and Liechtenstein through the European Economic Area (EEA), established 1 January 1994 (Egeberg & Trondal, 1999);
- the accession of Austria, Finland and Sweden on 1 January 1995, the signature of the treaty of Amsterdam on 2 October 1997;
- a reorientation of the Community interventions in the social field;
- the opening of the negotiations of adhesion on 30 March 1998 with Estonia, Hungary, Poland, the Czech Republic and Slovenia;
- the passage for 11 of the Member States of the European Union to the economic and monetary union (MOVED) on 1 January 1999 (Union européenne, 1999).

The progressive enlargements of Europe since its creation in 1957 by the Treaty of Rome mean that in 2003 the European Union is one of the most important markets for aquatic products in the world with 370 million consumers in the EU-15 countries and a potential market of more than 480 million with the inclusion of future member states. Over the last decade, fisheries production has been characterised by stagnation in landings but strong growth in aquaculture production (Anon., 2000r; DG-Fisheries, 2000). There is strong intra-regional trade in products because of the wide range of tastes between the Member States. In addition, the European Union has become the largest importer of aquatic products alongside Japan and the United States.

ANNEX 2: DEFINITION OF COMPONENTS AND FLOWS TO CONSIDER

The figure below shows the level of importance conceded to the 10 different components and the 16 diverse flows of the fish “production-trade-consumption” system. Two sub-systems have been defined: the food use system and the non-food use one. The first deals with fish as food for human consumption, from the producer (aquaculture and capture producer) to the consumer; the second concerns the capture of industrial species, their reduction to fishmeal and oils and their integration into the composition of food stuff for aquaculture and livestock.

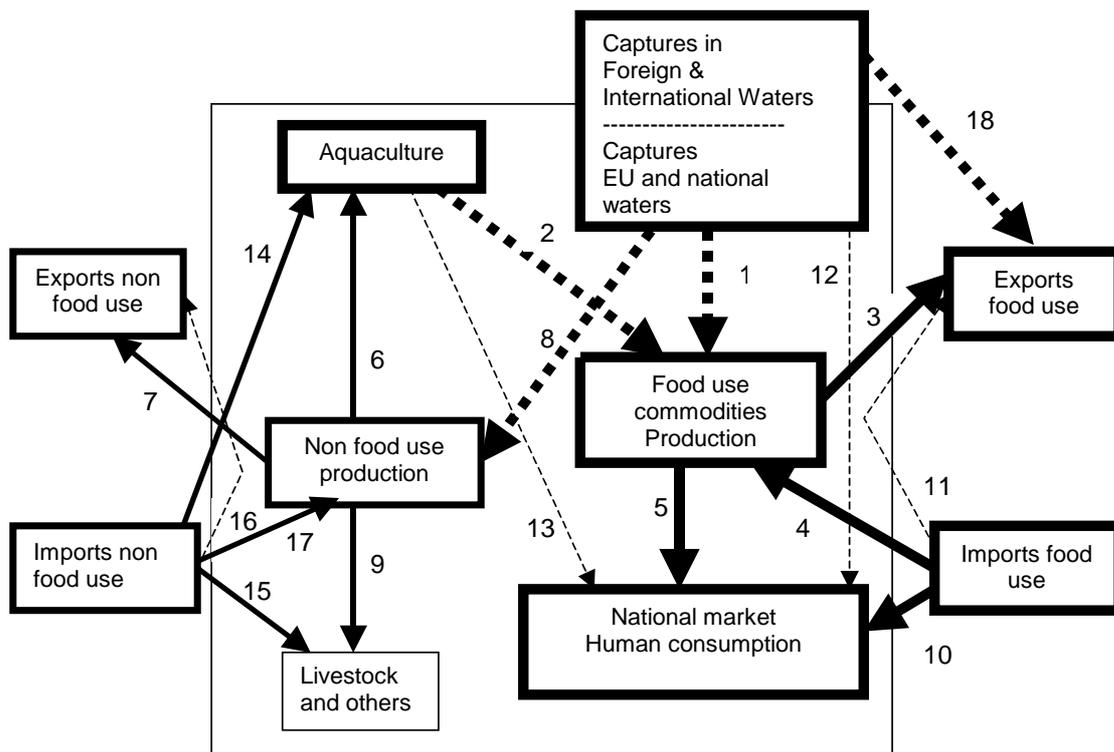


Figure Annex 2-1: Hierarchy of aspects covered by the study

Brief definition of components and comments on the data:

- Captures in foreign and international waters and Captures in EU and national waters: nominal catches landed by current EU-15 member states and countries that should join the EU in the future. All catches are in live weight equivalent and are designated for human or industrial purposes. Captures could have occurred inside the EU or national waters, in foreign waters through fishing agreements or in international waters (tuna mainly). These captures could have been landed in the country to which the boat belongs or in another country. From the databases received, it was not always possible to distinguish what was landed in a vessel’s flag country from what was landed elsewhere. Similarly, the distinction between captures for fish reduction and captures for human consumption was not possible for some countries.
- Aquaculture: nominal production of fish species from aquaculture sites in the selected European countries. Usually, there is good accuracy of data at the country level except when there are changes in the nomenclature or the data collection procedure.
- Food use commodity production: production of commodities (see list below). Two types of products constitute the commodity production: (a) products that are processed on board

from captures or on site from aquaculture and (b) products that are processed on land. The first category can be assimilated to the nominal production (same weight); the second one comes from the processing of landings and imports. Not all European countries keep good records of commodity production: most of the time, the number of products (labelled to species) is far less important than the number of species coming from captures and aquaculture. The level of production is also underestimated for most types of products. Many adjustments were made in the light of information collected. The important point here is that there is no bridge between captures and aquaculture components and commodity production. Captures are intended for both human and animal consumption and are not necessarily landed in the vessel's flag country. To produce foodstuffs that contain fish one can use the production of aquaculture, fishing and the import of raw material and semi-finished commodities. It is therefore improper to compare production from aquaculture and capture, and commodity production.

- Exports and imports for food use: products suitable for the human consumption occur in three different forms: raw material for entering into the production of fish commodities (fish for surimi, for example), semi-finalized product that will be processed to a more advance stage (gutted fresh fish, for example) or displayed on the consumer fish market, and finalized products that are ready for consumption (canned tuna, for example). Landings in foreign ports are considered as imports for the country where they are landed and exports for the country of the vessel that landed the fish. However, many countries don't make this distinction, so some catches landed in foreign ports are recorded as nominal catches but disappear in trade statistics if both countries (boat country and landing country) don't take these flows into account¹⁵.
- National market human consumption: products that come from the national production of commodities sector and/or imports. The national market is addressed in the study by the food use net supply and the consumption per capita per year. The food use net supply corresponds to the total fish products available at a country level. The consumption per capita is the net supply divided by the number of inhabitants of the country. It gives an annual average of the weight of fish consumed per capita. Variation of consumption inside a country is presented when information was available.
- Non-food use production: production of fishmeal and fish oil essentially. It is important to consider the non-food use production because of its implication to the potential growth of aquaculture of carnivorous species like salmon. The production of non-food use is also linked to livestock production. Using the national databases, it was not possible to make a distinction between what was for aquaculture feeding and what was for livestock purposes. The market for non-food products is aquaculture and livestock and others sectors.
- Exports and imports for non-food use: products unsuitable for human consumption and constituted by fish reduction, industrial species for reduction and other types of marine resources that can't enter into the human consumption sector (for cosmetics, for example). So, imports can be used as input to the fishmeal industry, livestock or aquaculture sector or other economic sectors (cosmetic and pharmaceutical sectors essentially). Exports have the same composition as imports. Re-exports of fishmeal were not taken into account in this study because of the difficulties in identifying them clearly and also because it was not considered as strategic information regarding the non-food use net supply.
- Livestock and others: sectors that use fishmeal and fish oil for the feeding of animals or other purposes. These sectors have not been investigated in the study.

A short definition of flows:

¹⁵ A good example is the sardinella caught in Mauritanian waters by Dutch vessels (150 000 tonnes per year on average since 1996), landed in Las Palmas (Spain overseas territory), and shipped to Nigeria, Ivory Coast, Ghana and China. The only record of this is in the nominal catches database. These sardinella don't appear as exports in the Netherlands fish trade database, nor as imports and re-exports in Spain fish trade records.

- Arrows 1, 2 and 18: flow of aquaculture and capture production toward the commodity production component inside the country (1 and 2) or outside (18). In many cases, the production of fish is made aboard the catching vessel, with the result that the Captures and Aquaculture components can be assimilated into the commodity production component. No data exist at the country level on these two flows. For the 22 regions (NUTS 3 level¹⁶) that were studied in 1991 and 1999 in order to assess their level of dependence on fishery and aquaculture activities, data are available but do not cover all of the regions that process fish in a country (Failler, 2003). Thus, these two flows were estimated subjectively on the basis of the structure of the industry and the national level of supply.
- Arrows 3, 4, 5 and 10: production, imports and exports flows of fish products are the main flows described and analysed in this study. They define the country's net supply or the apparent consumption of edible products. Assumptions for the projections to 2030 relate to changes in these four types of flows. The distinction between flows 4 and 10 is not obvious, as the data doesn't give information on the destination of the product: market or processing plants.
- Arrows 6 and 8 are respectively the flow of raw material for the non-food use industry and the flow of fishmeal and oil for the nutrition of carnivorous species in aquaculture. These flows, which are from time to time described in the literature (professional essentially), have been most of the time supposed a priori.
- Arrows 7 and 9: flows of non-food use products that seem to be correctly recorded in country fish trade databases.
- Arrows 12 and 13 are the flow of fish products that have not reached the official market and are not taken into account in the estimation of the net supply. To compensate for the absence of this information, some panel consumption surveys were used to compare the national net supply obtained from the addition of the national production and imports less exports to the national supply derived from the extrapolation of a sample to the total population.
- Arrows 14, 15, 17: flows of non-edible products that reach the aquaculture, fishmeal and oil processing, livestock and other sectors. There is no direct relationship between the evolution of the non-food use net supply and the evolution of aquaculture. The livestock sector plays a significant role here since for some countries there are opposite trends between the non-food use net supply and aquaculture.
- Arrows 11 and 16: imports re-exported without any transformation. They are not described in detail in the study but they have been taken into account.

Importance of the various components:

- Highly Important: the focus of the study being the human consumption, all components included in the sub-system "food use" were considered as highly important and as a consequence received special attention in terms of data collection, information, and the assumptions made for the projections to 2030. These components are presented in detail in the report, both for their recent history and the future situations.
- Important: "non-food use" sub-system, which included production of flour and oil, imports, exports. Aquaculture is also part of this sub-system as the nutrition base for the carnivorous species is fish protein from captures. Nevertheless, aquaculture received more attention as a unit of production for food use than as a unit of consumption of fishmeal and oils.
- Unimportant: the livestock and other sectors' situation in each country were not taken into account, either in terms of their recent history or the future. It was considered too much beyond of the scope of the study.

Classification of the flow importance:

¹⁶ European regional nomenclature.

- Highly important: All the flows related to the net supply of edible products (1, 2, 3, 4, 5, 10, 18);
- Important: All the flows related to the non-food use products (6, 7, 8, 9, 14, 15, 17);
- Unimportant: Flows of captures and aquaculture species that don't enter into the official market (12, 13), and the flows of food use and non-food use products that are imported and re-exported without any transformation (11, 16).

ANNEX 3: SOCIO-ECONOMIC OVERVIEW OF EUROPEAN COUNTRIES

It is useful to clarify a certain number of socio-demographic characteristics within the European Union. This enables us to evaluate the respective significance of each country and to demonstrate any trends over the study period (European Parliament, 1999b-f, 2000a-f)

Table Annex 3-1: Main indicators (1998)

Country	Area	Population (1000 people)	Life Expectancy		Demo depend	GDP (Million €)	GDP/H	Real growth rate	Human Dev Index
			Female	Male					
Austria	84	8075	80.6	74.3	51.3 %	188453	23338	2.9 %	0.932
Belgium	31	10192	80.6	74.6	50.3 %	223142	21894	2.9 %	0.932
Denmark	43	5295	78.5	74.1	50.4 %	155789	29422	2.7 %	0.927
Finland	338	5147	80.8	73.4	51.1 %	114782	22301	5.0 %	0.94
France	544	58727	82.2	74.5	52.9 %	1297764	22098	3.2 %	0.946
Germany	357	82057	80.3	73.6	46.2 %	1921764	23420	2.2 %	0.924
Greece	132	10511	80.8	74	46.8 %	108580	10330	3.7 %	0.923
Ireland	69	3694	78.6	73.4	49.5 %	75850	20533	8.9 %	0.929
Italy	301	57563	81.3	74.9	47.1 %	1058697	18392	1.3 %	0.921
Luxembourg	3	424	79.8	74.1	49.6 %	16389	38653	5.0 %	0.899
Netherlands	41	15654	80.5	75.2	48.7 %	349675	22338	3.7 %	0.94
Portugal	92	9957	78.8	71.6	47.5 %	97637	9806	3.5 %	0.89
Spain	505	39348	81.7	75.6	49.3 %	520196	13220	4.0 %	0.934
Sweden	411	8848	81.8	76.7	51.2 %	212003	23961	3.0 %	0.936
United Kingdom	242	59090	79.6	74.6	53.6 %	1252776	21201	2.2 %	0.931
EU-15	3193	374582	80.4	74.3	49.5 %	7593497	20272	2.7 %	
Cyprus	9.2	700	80	75	55.5 %	6700	9571	5.0 %	0.913
Czech Rep	78.9	10300	78.1	71.1	44.9 %	46418	4507	-2.3 %	0.884
Estonia	45.2	1400	76	64.7	50.6 %	4872	3480	4.0 %	0.758
Hungary	93	10100	75.1	66.4	46.8 %	40789	4039	5.1 %	0.887
Poland	312.7	38700	77.3	68.9	48.8 %	132795	3431	4.8 %	0.851
Slovenia	49	5400	76.7	68.6	47.7 %	17095	3166	4.4 %	0.875
Total	6	588	66600			248669	3734	3.5 %	
countries									
EUR-21	3781	441182	78.8	71.7	49.3%	7842166	17775	3.1%	
Bulgaria	110.9	8200	74.2	67.1	47.7%	8996	1097	4.0%	0.789
Latvia	64.6	2400	74.9	63.8	50.6%	4930	2054	3.8%	0.704
Lithuania	65.2	3700	76.8	65.9	50.4%	9382	2536	4.4%	0.75
Malta	0.3	400	80.1	74.9	49.9%	3100	7750	7.6%	0.899
Romania	237.5	22500	73.3	65.5	47.1%	31082	1381	-5.5%	0.767
Slovakia	20.3	2000	78.7	71.1	43.3%	16236	8118	3.9%	0.887
Norway	324	4400	81	75.5	48.1%	130770	29720	2.1%	0.943
Total	7	822.8	43600		48.2%	204496	4690	2.9%	
countries									
EUR-28	4603.8	484782	77.9	70.4	48.7%	8046662	16599	3.5%	

Source: Eurostat, 2000a and 2000b; UNDP, 1997; United Nations, 1999

Germany had the strongest GDP in 1998, followed by France, the United Kingdom and Italy and these countries generated 69 percent of the total EUR-28 GDP in 1998. With respect to GDP per capita, however, Luxembourg had the highest rate, followed by Norway and Denmark. There are 13 countries with a GDP per capita higher than 18 000 €, 7 countries between 7 000 and 14 000 and 8 countries between 5 000 and 1 000 €. Ireland and Malta had the strongest growth in excess of 7 percent, while the Czech Republic and Romania exhibited negative rates. The growth rate of the EU-15 was, on

average, weaker in 1998 than the growth rates of the potential applicants for enlargement (Euractiv, 1999).

With respect to social indicators, life expectancy at birth was higher in the EU-15 countries in 1998, than in the other European countries. Average life expectancy for EUR-28 was approximately 78 years for women and 70 years for men. It appears that women live longer in France, with an average of 82 years, and that men live longer in Sweden, with an average of 77 years. In 1998, France, Norway, Finland and the Netherlands ranked highest with respect to the index of human development while the weakest ranking countries were the Baltic States, Romania and Bulgaria.

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