

Intersectoral Integration Questionnaire

Question 1: What are the processes currently in place to ensure intersectoral coordination between the various fisheries-related sectors, at national or local level?

- To ensure effective intersectoral coordination between the various sectors related to the fishing, there are various local committees that bring together all stakeholders and which function the current state assessment of the fishing area or port and seek to improve certain situations, for example at each port is the port committee that brings its members a once every 3 months to study the various issues at the port level.

There's also the governorate level the agriculture committee and fishing that also meets all fishery-related sectors at regional level.

Question 2: What national or local campaigns or infrastructure (eg museums) currently in place to promote small-scale fishing and the "blues" related sectors?

- Locally, there are:

The festival sponges which takes place in July each année. Des sensitization days developed by an association Zarzis. Des sea trip with students or as researchers in the area of Biben. Des training session done in collaboration with some projects like COGEPECT. Un museum with posters, banners, vidéo.- sessions National level are:

The annual celebration of the World Day of artisanal fishing Ghanouch by developing group of pêche. La rowing boats racing and supplies of coastal fishing gear for gagnants. Les commercials published by the extension agency and agricultural training. sensitization of days worked by different associations.

Question 3: Who (or what institutions) is responsible for promoting the national and local levels (mayors, ministers) Blue Economy?

- The Tunisian Institute studies stratégiques.- The Ministry of Local Affairs and Environnement.- The Ministry of Energy, Mines and Energy renouvelables.- Ministry of Agriculture Water Resources and Fisheries. - The Ministry of Transport.

- The Tunisian-British Chamber of Commerce.

Question 4: What are the organizations or the relevant experts at national and local levels actively promoting artisanal fisheries with a view to blue economy?

Relevant organizations at the national level that actively promote artisanal fisheries with a view to blue economy are: - Artisanal fishing associations (Tunisian Association for Development of Artisanal Fisheries;

Our Big Blue Association).

- The GDP (fisheries development groups) .At local level, there are:

- Association fisherman Development and Mutual Society environnement.- fishing services. - 8 GDP all along the coasts of the Governorate Medenine.- 1 GDP for women to Jderia region.

Questionnaire Pescatourisme

Answer 1:

In the project area, there is no form of fishing tourism. By cons, at the country level, a demo day organized in Tabarka by WWF (World Wide Fund for Nature) for North Africa. On the occasion of this day, about 25 people between professionals, MPs and journalists were able to attend, Saturday, September 14, 2018 instead of tourists, a sea trip, during which fishermen have cast their nets. They also visited the perimeter to house the marine protected area of Tabarka.

Answer 2: the coastal tourism situation in the project area and in the country:

Answer 2.a: Near 890,000 tourists visited the region (Djerba- Zarzis) between January and September 2018, an increase of 43% compared to the same period of 2017. Similarly, the number of overnight stays increased by 50% amounting to 5, 8000000. The French market tops as the first issuer of tourists (190,000) in the region, followed by the Russian market (170,000) and Germany (88,000 tourists).

Answer 2.b: In most coastal areas, the tourist season starts early April until the end of August each year.

Answer 2.c: We have already mentioned that in the project area, there is no form of fishing tourism. But according to our knowledge of the region, output can cost 30 to 70euros / person.

Answer 3: All stakeholders of artisanal fisheries in the region are interested and are willing to develop this activity for the purpose of development and income diversification.

Answer 4: The absence of a legal framework to "pesca" (fishing tourism) is a major obstacle to the development of this activity in Tunisia.

Questionnaire Chain Integration valeur

The fishing-related interventions that have been conducted over the last decade

- "The task multi-institutional force to the development of value chains and clusters (TFSCVC)" launched Wednesday, September 5, 2018, for technical support to micro, small and medium enterprises (MSMEs) Tunisia to strengthen their competitiveness in chains values, not just for the benefit of the high potential for job creation products but also for other sectors with high employment and growth potential (national development inter-agency technical committee are: CEPEX APII APIA, TIA, and ODNO ODCO).



➤ **The priority directions of agricultural scientific research 2030**

challenge 1 : Food security and contribution to economic growth

- Increased sustainable productivity and plant and animal production
- Sustainable development of bio-resources and aquatic ecosystems

challenge 2 : Preservation of natural resources in a changing climate

- Preservation of ecosystems and sustainable management of natural resources
- Preservation of pastoral and forest resources

challenge 3 : Integration of courses, organization of the profession, regional development and social equity

- Agricultural Policies and prospective
- Chains of food value and market access



- **The official launch of the program "Regional Support Initiative for sustainable economic development" (IRADA)** was announced, Friday, May 11, 2018 in Tunis.

8 Tunisian governorates countries (Jendouba, Sidi Bouzid, Kasserine, Gafsa, Medenine, Sfax, Gabes and Bizerte) will benefit from this program



**Initiative Régionale
d'Appui au
Développement
économique durable**

It aims to strengthen the private sector's contribution to sustainable economic development of the target regions, improve the quality of vocational training and support to employment services, sustain the participation of regional actors in private sector development and governance vocational training.

- **State subsidies (GIPP)**

- Grant for the freezing and storage of sardines, Circular No. 106 published May 11, 2016
- Grant refrigerated storage of fresh sardines, Circular No. 106 issued May 11, 2016
- Support for the transport of fishery products between the ports and factories
- Contribution to the promotion and marketing of blue fish, seabass and bream farming in the inland regions.
- Take loads the purchased price of the blue crab, to support the cost of handling, freezing and storage of crab in the collection points, take charge of transport cost, Circular 67 issued April 10, 2018
- biological recovery grant
- Grant VMS Circular No. 316 issued on 29 December 2017.

- Project FMM "Allowing women to benefit more equally agro-food value chains" (2016)
- TCP Strengthening the role of women in the sector shellfish clam (Tunisia) (2008-2011)
- TCP "Promoting sustainable positioning of the OP for better integration of small farmers and farmers in the value chain (2015-2017)
- The supply chain of the fishing Zarzis has been notable interventions of international cooperation programs, including the NEMO I and II projects, FAO intervention and the French and Japanese cooperation are of interest particular.
- Presence of civil society in Medenine

9 GDA:

- GDAP feminine "SBIRSA" Development of processing industry of fishery products
- GDAP Ajim Development clam industry
- GDAP El Grine Development clam industry
- GDAP "EL BARAKA" Development of clam industry
- GDAP Guellala Development clam industry
- GDAP "HACHENA" Hessi Jerbi: Development of the sector of artisanal fisheries
- GDAP Houmet essouk
- GDAP Boughrara
- GDAP Sidwikch
- GDAP Jdayriya

2 associations

- Jlij Association for the marine environment AJEM
- Association fisherman

And a fishing cooperative in the port of Zarzis



certification

- In collaboration with GIPP, the project "Quality Label" was implemented.



- Project ProMaqua " Promotion and Innovation of aquaculture products "for the development and diversification of aquaculture products (GIPP is responsible for the development of the specifications of the quality of these products label)



- Implementation of quality sign MSC for octopus in the region Houmet essouk and El Ktef.
- First fair trade initiative in Tunisia clam sector in collaboration with FAO in the southern Tunisian region to enable women to benefit more evenly the food value chains in the clam industry.

➤ **Companions of Consumer Awareness**

- study of invasive species Day: September 2017 to inat (tasting share)
- SIAMAP October 2017 4 Tasting actions
- July 2017 Competition for cooking crab in Djerba Houmet essouk.
- December 2018 in Kerkennah: tasting crab in the octopus festival.



➤ **Market research**

- Research local and international market Wolf and bream aquaculture in Tunisia
- Study positioning the blue crab in Tunisia and abroad.
- Development of a strategic plan for export of fishery products (ongoing)

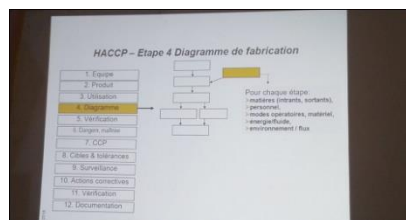
➤ **Prospecting new markets**

- Involvement of Seafood at GIPP North America, March 2018
- Participation GIPP NIVISAD the international fair in Serbia, May 2018
- Participation in the International Fair Word Seafood Shanghai, August 2018



➤ Assistance and supervision of the profession

- The professional training center of Zarzis plays an important role. He has conducted numerous training courses on safety on board fishing vessels, processing sponges and manufacture of fishing nets by women.
- Training for industrial ISO 22000: Planning a series of training sessions on ISO 22000 in its latest version for exporters.



- Training and awareness continues following the good hygiene practices guide.

➤ Service development

- PIPA has completed the project of garbage collection "Blue Port", supported by FAO, MARPH and APDE, which improved hygiene and working conditions of the fishery sector employees in the port of Zarzis.
- The fishing port of Zarzis fishing cooperative has studied the possibility of modernization of refrigerated areas of the fisheries market, in order to improve the optimization of the structure and staffing of jobs, freezing and storage of fresh and frozen products. This project provides for the complete renovation of the structure and insulation. The freezing process gives the product superior value and small pelagic fish themselves are not related to seasons for the canning industry of Zarzis.



Opportunities to improve the value chain and Solutions

- Fishermen awareness about the role and services groups and support them
- limit the number of fish traders
- limited distribution channels: producer-consumer
- installing a clear computerized sales system during product transactions
- encourage marine products processing companies
- diversify farmed species
- drive the local production of fry and feed
- push fishing by selective gear.

major constraints

The main difficulties encountered by Tunisian firm on foreign markets are:

- the intermediate of the control of the local distribution circuit of the product;
- non mastery of production costs that the activity is dependent on imports.
- non competitive on price;
- local production of fingerlings and food remains modest
- the lack of thrust prospecting in foreign markets;

The main constraints for fishing:

- only 16% of the population maritime Medenine GDAPs are recorded in the area.

- The seizure of intermediaries throughout the sectors of fisheries products.
- The limited resources of small fishermen
- Resource degradation and declining production.
- Rising production costs for all types of boats.

Aquaculture Questionnaire

Question 1:

Summary of the law / policy, code of conduct and governance related to the development of aquaculture in the region or country of the project (including land / water / environmental)

answer 1

The legal texts governing the aquaculture activity in Tunisia:

- The 94-13 law of 31 January 1994 constitutes the framework law for the fisheries and aquaculture. Its scope is very wide as it includes not only the farming of aquatic organisms but also their capture, their collection or extraction ..
- the regulations governing the environmental aspect:
- Regulations concerning the occupation of Public Domain
- Health rules for the production and placing on the market:

Strategies and Plan developed:

Several studies, develop plans and strategies have been adopted by the Tunisian government to develop and promote aquaculture activities:

- 1993-1996: Plan Aquaculture (siting of settlements onshore projects)
- 2002: Study choice sheltered sites for marine fish .
- 1998-2003: UNDP Project (Mainland).
- 2002-2006: Director of Aquaculture Plan (2002-2006) which estimated the potential and the production target and outlined the development strategies.
- 2006: National Strategy for Aquaculture Development (2007-2016), which aims to encourage private developers by strengthening financial incentives and the creation of an aquaculture training center for the transfer of aquaculture technologies and supervision of promoters.
- 2012: Strategic study of Fisheries and Aquaculture.

Question 2: Describe the form of aquaculture or existing production line in the area or the country of the project.

Reply 2:

The different system of elevage existant in Tunisia are:

Marine Fish farming

farmed species in Tunisia are essentially the bar (*Dicentrarchus labrax*) And sea bream (*Sparus aurata*. natural.) In offshore cages (24 projects).

Hatcheries

There are currently two hatcheries for artificial production of marine fish fry whose technical principles are similar. it's Hatchery Aquaculture of Tunisian society in Hergla and Hatchery SAT society. In addition, 5 new hatcheries had the definitive agreement, they are being installed.

shellfish consists mold livestock (*Mytilus galloprovincialis*) and oysters (*Crassostrea gigas*) in the lagoon of Bizerte on floating dies (7 projects)

The continental fish farming practiced by extensive in dams (28barrages) The dam is operated by private, by grouping shall develop or fishing license .In intensive, mainland pisciculture consists of tilapia (*Oreochromis niloticus.*) in earthen ponds (4 projects).

seaweed: cultivation of Spirulina in earthen ponds (6 projects)

shrimp: 1 pilot project for breeding penaus vanamei shrimp in cooperation with the People's Republic of China.

Question 3: What are the state (ie the state of development) and nature (small / collective, large / commercial) of aquaculture in the region and the country of the project?

Answer3

Aquaculture production in Tunisia reached 22000 tonnes in 2017, it represents 16% of total fisheries and aquaculture production with a change of 34% compared to the year 2016, this production comes from 42 aquaculture projects. The volume of investment represents 60% of total investment in the fisheries and aquaculture sectors, the value of aquaculture products is 229 million dinars (22% of the total values of the fishery products and aquaculture).

This is a commercial aquaculture

Question 4: What is the favorite aquaculture management mode (and integrated management with other sectors)?

answer 4

aquaculture management in Tunisia is based on a participatory approach involving all agencies managing sectors interacting with aquaculture (environment, tourism, transport, coastal fisheries, defense,) these organizations are to participate dan the decision when to new projects of installation, the level of different advisory committee

- Advisory Committee on regional aquaculture project applications, introduced in 2014, in each governorate with a coastal aquaculture potential to reduce interactions between different activities using the same space. This committee is responsible for reviewing applications for aquaculture projects and expansion of existing projects in accordance with the priorities and local needs.

- The Committee of Aquaculture (CTA) in charge of defining the technical criteria and evaluate the technical and economic feasibility of aquaculture projects.

- the Advisory Committee on Fisheries fixed

* **Question 5:** Are there examples of aquaculture tourism (eg, boating in an oyster farm, taste local products or a seafood restaurant)? Could there be a market for it?

Answer 5:

Currently there are no aquaculture tourism in Tunisia. However, this type of tourism could be developed as eco-tourism at the integrated aquaculture projects, the creation of applications are increasingly important.

Question 6: What are the main obstacles (legal, infrastructure capacity business-friendly environment, cultural) development of aquaculture?

Reponse6:

- not suitable institutional and legal framework
- inadequate health and environmental monitoring
- Interaction between coastal fisheries and aquaculture (Conflicts'interest with the activities using the same space)
- Absence of port infrastructure dedicated to aquaculture activity
- Difficulty award of concessions on the maritime public domain for installing aquaculture projects
- high production cost
- Marine fish farming dependent on imported inputs (fingerlings and fish feed)
- limited market (95% local)