



GENERAL FISHERIES COMMISSION
FOR THE MEDITERRANEAN



COMMISSION GÉNÉRALE DES PÊCHES
POUR LA MÉDITERRANÉE

GENERAL FISHERIES COMMISSION FOR THE MEDITERRANEAN

SCIENTIFIC ADVISORY COMMITTEE

Ninth Session

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**REPORT OF THE SEVENTH SESSION OF THE SUB-COMMITTEE ON
ECONOMIC AND SOCIAL SCIENCES (SCESS)*
ROME, ITALY, 11-14 SEPTEMBER 2006**

*Available only in English

OPENING OF THE MEETING

1. The Sub-Committee on Economics and Social Sciences (SCESS) held its seventh meeting from 11 to 14 September 2006 at FAO Headquarters. Mr Malouli Idrissi, the Sub-Committee Coordinator, welcomed the participants.
2. Mr Alain Bonzon, the GFCM Executive Secretary, officially opened the meeting and reviewed the main issues and priorities, including those related to the transversal workshops held in Malaga, Spain, May 2006, and in Rome, Italy, June 2006. He also stressed the particular importance of the Operational Units concept, socio-economic indicators and procedures for the standardization of fishing effort with reference to the management of Mediterranean fisheries.

ADOPTION OF THE AGENDA AND ARRANGEMENTS OF THE SESSION

3. As some representatives were unable to attend the meeting or were only available during specific times, the Sub-Committee adopted the agenda of the meeting with relevant adjustments (Annex 1). Mr. Accadia was designated as Rapporteur.
4. The meeting was attended by 11 scientists representing 7 Members (Albania, Croatia, Italy, Morocco, Slovenia, Turkey and the European Community) as shown in the list of

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participants attached in Annex 2. The SCESS welcomed the first-time participation of scientists from Turkey, Slovenia and Croatia.

REVIEW OF THE RECOMMENDATIONS OF THE THIRTIETH SESSION OF GFCM AND THE EIGHTH SESSION OF SAC

5. The Coordinator presented the past recommendations made by the GFCM and the SAC, to the SCESS. The principal recommendations comprised:

Recommendations by GFCM to SCESS:

- development of the use of socio-economic indicators in fisheries management through the implementation of the OUs approach;
- study of the legislative and socio-economic aspects of recreational fisheries;
- analysis of the impact of national and regional market forces (including supply and demand, prices, quality control) on the fishing industry and on the management of the fisheries concerned.

Recommendations by SAC addressed to the SCESS:

- To organize a technical workshop on the use of socio-economic indicators in fisheries management.
- To extend the Albanian experience with social indicators to other countries so as to define a minimal list of social indicators to be collected throughout the GFCM fisheries, and to evaluate the compatibility of these indicators in the context of the Operational Unit framework.
- To undertake further case studies analyzing the socio-economic and biological impacts of potential effort management strategies affecting selected OUs.
- To use the “Traffic Light” approach to analyze the trends in socio-economic indicators for use in fisheries management.
- To further analyze national legislative frameworks especially on access regimes to fisheries resources, management of fishing effort and fishing capacity, and monitoring, control and surveillance.
- To further analyze the impacts of national and international market forces (both demand and supply side) on the fisheries industries and on fisheries management.

INTERSESSIONAL ACTIVITIES

Presentation of the results of the Workshop on Stock Assessment and Operational Units (Rome, June, 2006)

6. Mr Malouli presented the major results of the Workshop on Stock Assessment and Operational Units (Rome, June 2006) as well as the GFCM Task1 OU tables (Annex 3) and explained the role of socio-economic variables within the Task 1.

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7. Mr Accadia highlighted that the economic data are considered and collected by fleet segment and not by OU. This approach underlines the necessity to collect and analyze socio-economic information by fleet segment.
8. Other participants noted the benefits of collecting more detailed data by fleet segment (i.e. by fishing gear) whenever possible.
9. Mr Vrgoc underlined that for many Mediterranean countries a lack of economic data collection system represents a preliminary problem, independently from the data categorization adopted by GFCM.
10. Some participants noted that current national fleet segmentation may not match up perfectly with the SAC approved fleet segmentation due, for example, to different sampling strata and, therefore, requested statistical assistance in homogenizing their data for the GFCM Task 1.

Presentation of the results of the Workshop on standardization of measurement of fishing effort (Malaga, May, 2006)

11. Mr Malouli presented the major results of the Workshop on standardization of measurement of fishing effort (Malaga, May 2006) focusing on the economic aspects.
12. The effort-based fishing management follows economic logic because, by limiting the fishing effort (i.e. decreasing the number of fishing days), the cost of the activity is also decreased, which is considered one of the principal strategies of the theory of economics. The main effort data needed for economic analysis are found in table 3 of the Report of the thirtieth session of GFCM, appendix D. Regarding economics, the fishing effort could be envisaged under the following points of view:
 - The number of vessels/year, by fleet segment, could inform us about the invested capital and the action undertaken by fishermen to renew the vessels and improve the work conditions;
 - Number of trips/year (number of hours/trip) informs about variable costs which should be estimated in the most appropriate way. It is the most important parameter for the cost-benefit approach. In this sense, it is also important to have fuel consumption and price, per vessel and trip as a separate input;
 - The vessel characteristics (engine power, GT, length, etc.). The profits are calculated in general as a function of those characteristics, because it is important to know profits by power unit or profit by capacity unit;
 - For some countries those data are not available; for this reason it is advisable to propose data collection systems and methods to collect the data needed with respect to the working conditions of the different countries.

PROGRESS CONCERNING THE MEDITERRANEAN FISHERIES REGULATIONS AND LEGISLATIVE ASPECTS

13. Mr Massa introduced the progress realized within the AdriaMed project about the collection and analysis of information on regulations and legislative issues. Mr Massa introduced the presentations “Regional database on bottom trawl fisheries regulations in the Adriatic Sea” by Mr Vrgoc, and “Web Data Bank on the Adriatic fisheries legislation” by Ms Milone.

a) Regional database on bottom trawl fisheries regulations in the Adriatic Sea

14. Mr Vrgoc informed the Sub-Committee on the recent progress of the work carried out by the AdriaMed Project to establish a regional database for bottom trawl fishery regulations in the Adriatic Sea. The purpose of this database, created in March 2005, is to produce a set of relevant thematic charts for the Adriatic Sea and includes all fishery regulations relevant to demersal trawl fishery (bottom trawl fishery) in Albania, Slovenia, Croatia and Serbia-Montenegro. Information on prohibited zones, fishing closed areas, marine parks, deposits of ammunition areas, gas platforms as well as submarine cables are recorded.

b) Web Data Bank on the Adriatic fisheries legislation

15. Ms Milone presented the Adriatic Fisheries Legislation Databank, available on the AdriaMed Project Web site. This database provides background information through September 2004 on legislative topics of importance to marine capture fisheries in the countries bordering the Adriatic Sea (Albania, Croatia, Italy, Serbia-Montenegro and Slovenia). The information is organized by country, into five main topics: International agreements and participation to regional bodies, Access regimes to fisheries resources, Definitions of terms, Management and conservation measures, and Monitoring, control and surveillance and measures. Full texts for the laws mentioned are also available. This databank is hosted in the section of the online database of the AdriaMed portal which represents one of the components of the AdriaMed Information System. The AdriaMed portal was then illustrated to the Sub-Committee as well as some of the main databases on line produced so far: the legislative databank mentioned before, the databank on the shared fisheries demersal stock of the Adriatic Sea, and the Adriatic abstract database which includes over 4 500 bibliographic records coming from the ASFA database. The Information system of the Project provides service to the participating countries as well as support to the research activities.

16. Many of the Participants have used the AdriaMed Web page (www.faoadriamed.org) and recognized its usefulness for researching information of Adriatic fisheries, and fisheries abstracts indirectly from the ASFA database. In addition, AdriaMed was congratulated for their online legal database in providing clear and structured filtering of legal text. Participants stressed their interest in the possible development of a similar database also for the other Sub-regional projects by emulating the AdriaMed work.

THE MARKET FORCES IN THE MEDITERRANEAN FISHING SECTOR

a) Towards a Mediterranean free trade area. Fish trade relations within the Mediterranean basin

17. The presentation made by Loretta Malvarosa from IREPA represented an update (to 2003) and an extension of the FAO Circular n. 978 “The Fish Trade of North African

Mediterranean Countries”. This update was prepared for the Interministerial Conference on the Mediterranean fisheries held in Venice in 2004 and also presented at the 2004 XVI Annual EAFE Conference. No further update was made and, hence, it should be noted that a number of changes have taken place since 2004 (e.g. the definitive entry of some additional Mediterranean countries into EU).

18. First, the presentation highlighted the WTO requirements for world fish trade exchange. The Doha Agenda (one of the latest WTO negotiations) includes a number of issues of particular importance to international trade in fish and fishery products, including improved market access, fisheries subsidies, environmental labelling, the relationship between WTO trade rules and environmental agreements, as well as technical assistance and capacity building (Lem, 2003). The improvement of market access for fish and fishery products is strongly linked to reductions in tariffs and of non-tariff barriers. Furthermore, it was stressed that fish and fishery products are not covered by the Agreement on Agriculture, and, hence, improved market access for fishery products is therefore linked to progress in the negotiations on Market Access for non-agricultural Products. The Doha Mandate also underlines the particular importance to be given to products of export interest to developing countries and specifies that the modalities must include capacity-building measures to assist least-developed countries in participating effectively in the negotiations.
19. Second, the presentation further highlighted the Regional Trade Agreements (RTAs) involving EU and its Mediterranean partners, being:
 - the Euro-Mediterranean Partnership (EMP) involving the EU, and 12 Countries of the Southern and Eastern Mediterranean (from North Africa to Middle East); and
 - the Stabilisation and Association Process (SAP) involving the EU, and Countries of the Southeastern Europe (Balkans).
20. The main objective of the two RTAs is the creation of a free trade area in the interested areas. The main instruments of EMP and SAP are a new generation of Agreements that the EU is establishing with each country involved in the above processes.
21. In analyzing the fish trade exchange between EU and the Mediterranean countries the tariff scheme was also considered. In 1971 the UE adopted the first Generalised Scheme of Preferences (GSP) that is an instrument under which industrialised countries would grant trade preferences to all DC, affecting more than half of the Mediterranean countries. The GSP consists in a reduction of the MFN tariffs for products to which a “preference” is assigned. Beside the GSP tariff scheme, trade exchanges between EU and the Mediterranean countries must be analyzed in the wider context of the EMP and of the SAP. As said above, the main aim of both these processes is the creation of an FTA where products, including fish and fishery products, could circulate free of any tariff and non-tariff barrier. This objective has been partly achieved, as for the EU-Morocco, EU-Tunisia and EU-Croatia agreements, where specific protocols for fishery products has been signed.
22. Third, the presentation focused on the analysis of data on fish trade among Mediterranean countries and between EU and its Mediterranean partners. In the first case, by using the UN-Comtrade data, it was possible to build a matrix of intra-Mediterranean fish products trade flows. It emerges that of the total fish exports from the Mediterranean countries, about half remains inside the Mediterranean (i.e. intra-Med trade). On the contrary, of the total fish

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imported by the Mediterranean countries, only 22% originates from inside the Mediterranean area itself.

23. Finally, fish trade exchanges between the EU and the Mediterranean countries was analysed showing increasing trends in both exports and imports flows in the period 1996-2002 (DG-trade data).

24. Ms Malvarosa then presented the following conclusions drawn from her work:

- that fish trade liberalization between EU and the Mediterranean countries is having positive results, if considering the increasing trend of the global exchange;
- that fish trade liberalization could have further positive effects. EU imports of fish products from the Mediterranean countries could represent an opportunity to meet the increasing European demand of fish products *vis-à-vis* the numerous limitations on domestic fish production (quota, size restriction, etc...);
- Notwithstanding, even if the Uruguay Round played a crucial role in the tariff levels reduction, a number of import duties continue to hinder trade processing and economic development of the fishery industries in many developing countries. In particular, non-tariff barriers, as qualitative standard requirements for fish products to enter the European market, represent high obstacles to trade;
- Furthermore, FAO forecasts of fish products demand through 2030 (Catarci and Sabatini, 2003) has projected increasing demand trends, especially for the southern side of the Mediterranean. This could cause an inversion on the exchange flows of fish products: Southern Mediterranean countries could switch from being net exporters to net importers of fish products; with clear consequences in terms of fishing pressure and hence, of the fish stocks exploitation for both the European and Mediterranean waters.
- In this context, there is an increased need to set new management measures able to face the risk of an increase of the fishing pressure and to safeguard the welfare of the Mediterranean people and resources.

25. Ms Malvarosa stressed the difficulties met during the first part of her work related to the collection of data: while trade data were available from the EU as a single unit, trade flows broken down to country levels were difficult to collect. The need and usefulness of such data were clear and recognised by the Participants.

26. The work developed by Ms Malvarosa was considered particularly useful by the Participants, who stressed the need to update this work, particularly in relation to changes in legislation and international status of some countries during the process of EU accession.

b) Analysis of swordfish commercialization between Morocco and Spain

27. Mr Malouli Idrissi presented the “Analysis of swordfish commercialisation between Morocco and Spain”. In Morocco, the processing and marketing of swordfish is insured by 12 export companies, but just 2 or 3 of them have the total control of the sector, from harvesting to export, and therefore determine the prices. It is important to note that about

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98% of swordfish landed is exported to Spain and Italy, highlighting the dependence of Moroccan exports to these countries.

28. A price analysis showed a seasonal character of four phases, the average price can fluctuate between 6 and 10 euros. The national price is not correlated to the national landings of swordfish, as that the national price is strongly linked to international landings.
29. The relation between prices in Moroccan and Spanish market is very relevant, with a price transmission elasticity about 43%.
30. The presentation by Mr Malouli highlighted the presence of strong effects of market prices on the fishing behaviour and on the effort level exerted on the biomass. Therefore, management measures should take into account market effects when developing management regimes.
31. To analyze the impact of market forces on fisheries and, in particular, on fisheries management, some potential studies were discussed by SCESS. The following 4 priority areas for analysis were identified based on the stock based recommendations of the 30th session of GFCM:
 - Sardines in GSA 03;
 - Striped mullet in GSA 05;
 - Hake in GSA 06;
 - Small pelagics in GSA 17.

DEVELOPMENT OF SOCIAL INDICATORS FOR THE MEDITERRANEAN FISHERIES

32. Ms De Young presented an overview of the issues surrounding the eventual development of sociological indicators for use within GFCM fisheries management. In the presentation, she provided the motivation for collecting and understanding information regarding the sociological aspects of fisheries, including changing priorities in fisheries management (from purely production based to poverty alleviation, employment, ecosystem, holistic-based approaches) and unintended effects of past management measures due to a lack of knowledge concerning the motivations of those affected by such measures (e.g. non-economic incentives outweighing economic incentives).
33. Ms De Young then outlined ways in which sociological analyses could assist in the understanding of social, economic and institutional contexts, in the planning of appropriate management frameworks and measures, and in predicting social impacts of implemented measures. Ms De Young then presented a list of sociological indicators (Annex 4) developed through the AdriaMed project and applied within the sociological survey of Albanian fisheries, which occurred under the auspices of the AdriaMed project. Ms De Young posed the following questions for discussion by the SCESS:
 - What are the GFCM management needs *vis-à-vis* sociological information?
 - Will the indicators presented provide a generic enough coverage to respond to GFCM management needs? Are there key indicators missing?

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- Can we propose this list now or should we wait for more applications of sociological surveys?
 - How should the SCESS best approach the development of a minimal list of sociological indicators to provide to SCSI.
34. The Participants agreed on the need to define a minimum list of sociological indicators to integrate the data collection system within the OU framework defined as GFCM Task 1. This list should be defined specifically for the GFCM management needs. However, the work should not be limited to a minimal list as full guidance is necessary for assisting countries at the national-level of analysis. Therefore, effort should also be made to finalize a detailed list of sociological indicators based on the work affected by AdriaMed. The identification of such social variables to be collected could be obtained by organizing specific workshops on this matter within the Sub-regional projects.
35. Ms Forleo recalled the research project “AdriaMed Social Survey of Albanian Marine Fisheries” implemented in 2003. The goal of this study was to gain a detailed insight into the social context of the Albanian fisheries. Ms Forleo stressed the need to update the study to incorporate lessons learned during the first attempt at collecting sociological information. Based on an updated social survey, it could be possible to apply this methodology in other GFCM countries, such as Montenegro.
36. The proposal by Ms Forleo met the agreement of the Participants, who recognized the importance of the sociological aspects in fisheries and the usefulness of such surveys in collecting relevant sociological data. In addition, the Participants requested that a review of the lessons learned from the Albanian survey and further analyses be published with a minimum delay.

LEGISLATIVE AND SOCIO-ECONOMIC STATUS OF RECREATIONAL FISHERIES IN THE MEDITERRANEAN

37. In the absence of Ramón Franquesa, Ms De Young briefly informed the SCESS of the following relevant activities concerning recreational fisheries¹ in the GFCM countries:
- the recent publication of the results of the EC-funded SFITUM project² involving Spain, Italy and France;
 - the on-going discussion within the FAO EIFAC³ on the preparation of a European Code of Practice for Recreational Fisheries;
 - the potential availability of an FAO internship to prepare a GFCM-wide description of the legal frameworks for recreational fisheries; and
 - the up-coming Congress on Mediterranean Salt Water Recreational Angling.⁴

¹ Includes sports fishing and any other term used to identify non-commercial and non-subsistence fishing.

² Sport Fishing: an informative and economic alternative for tuna fishing in the Mediterranean. <http://www.sfitum.net/>

³ European Inland Fisheries Advisory Commission - <http://www.fao.org/fi/body/eifac/eifac.asp>

⁴ 20-23 September 2006 – Palma de Mallorca, Spain - <http://www.mediterranea-congres.org/>

38. The participants shared their experiences with recreational fisheries (e.g. socio-economic values and conflicts among fisheries) and noted varying degrees of perceived importance and treatment in the legal framework. The representative from Albania remarked that it was not until specific research was undertaken that the economic importance of the recreational fisheries was understood in her country. In addition, some countries mentioned that information regarding the recreational fisheries is already available.
39. The participants identified two priority areas of studies that would provide the GFCM with a baseline understanding of the recreational fisheries in the region: 1) an analysis of the legal frameworks regarding recreational fisheries amongst GFCM countries; and 2) an exploratory survey of the socio-economic status of recreational fisheries among GFCM countries.

THE USE OF SOCIO-ECONOMIC INDICATORS IN FISHERIES MANAGEMENT

a) Socio-economic indicators in the North and Central Adriatic Sea

40. Mr Accadia presented a socio-economic analysis of demersal and pelagic fisheries in the North and Central Adriatic Sea (GSA 17) developed as contributions for the AdriaMed Working Group on Biological and Economic Indicators for Adriatic Sea Demersal Fisheries, held at the Laboratory of Marine Biology and Fisheries in Fano, Italy on 24–25 May 2005, and for the AdriaMed Working Group on Small Pelagic Fisheries Resources of Adriatic Sea, hosted by the ISMAR-CNR in Ancona, Italy 15–19 May 2006.
41. The analysis was performed using a set of 24 socio-economic indicators. Economic indicators included 6 indicators on economic performance, 8 on productivity, 4 on costs and prices, and one general indicator summarizing economic sustainability. From the social point of view, 4 indicators plus one general indicator summarizing social sustainability were defined.
42. Trends of these indicators were analyzed using the so-called Traffic Light System, using reference values defined according to their percentile value in the following series: > 66th percentile, 66th-33rd, and < 33rd percentile. Based on each specific indicator, the three standard colours, green, yellow and red, were assigned accordingly to indicate indicator “health”.
43. The analysis was performed using data available from the IREPA monitoring system along the Italian coastline and covering 1996 to 2004.
44. Mr Accadia highlighted that this analysis was made possible by the availability of economic data comparable over time, and stressed the need for an homogeneous definition of fleet sub-units to allow for this kind of analysis. It was also stressed that the analysis of socio-economic indicators should be developed by fleet segment and not by OU according with the economic data collection defined by the GFCM Task 1 on OUs.
45. The Participants noted that the socio-economic analysis developed uniquely for Italian fleet cannot be considered as an exhaustive analysis since it does not consider the effects on shared stocks due to changes in fishing pressure by fleets belonging to other countries in the same GSA. However, the lack of economic data for the most part of Adriatic countries presents difficulties in the analysis for all the countries involved in the same fisheries.

Therefore, it is suggested that these data be collected to provide for an expansion of the study to the entire GSA and/or the entire Adriatic Sea.

b) Socio-economic aspects of the Moroccan Mediterranean fisheries

46. Mr Malouli presented “*Socio-economic aspects of the Moroccan Mediterranean fisheries* ».

In the Moroccan Mediterranean waters, fishing activity occurs along 512 km of coastline. The fleet which is based in 8 ports, the fisheries presents several assets, mainly: an important social weight, resources with high commercial value and proximity to the European markets. However, there are several constraints. The marine resources are exploited by a fleet of 646 coastal boats and approximately 2 600 small boats (<6m). The annual catch is about 48 000 tons, of which 31 000 tons of small pelagic species and 13 000 tons of demersal species. The principal socio-economic indicators used are related to the labor, the level of education and maritime training and also, the evolution of the sales turnover, the invested capital, the costs of production and the raw profits.

The sector allows for approximately 17 000 direct employment and 8 000 indirect employment. Overall labor is stagnant for several reasons: the boats are more and more industrialized; the social conditions do not improve; the share system gives more advantages to the ship-owners. As for education, the level of illiteracy remains very high compared to other economic sectors, with an average of about 80%, despite the effort of the Ministry which is setting up several national programs to decrease this high rate. As education became mandatory, it is expected that the next generation of the fishermen will not be illiterate. The maritime training is also mandatory to obtain a fishing permit, but the programs taught are considered inadequate. Generally, women do not participate in the various fishing activities, but they contribute intensively to the fish processing chain. The invested capital in the fishing sector is in the range of 150 million Euro, representing a substantial increase from the previous year. The sales turnover is estimated at about 66 286 300 Euros. There has been an increasing trend during the last 4 years. The raw profits are positive for all the fleet segments, and the added values are very important as well. The Moroccan Mediterranean Sea presents 6 operational units; all the indicators were analyzed according to these units.

47. Ms Malvarosa (IREPA) questioned the way data on employment and invested capital were collected in Morocco. On these issues (employment and capital value) two studies are being carried out by some EU Institutes (IREPA among them) and it was recalled that EU Data Collection Regulation requires employment and capital value data in fisheries. International definitions in this respect seem to diverge significantly. Hence, international comparisons are difficult. Therefore the Scientific and Technical Economic Committee on Fisheries (STECF) advised the EC to carry out studies which would develop acceptable methodologies for the estimation of both indicators. The results of these studies should be communicated to the SCESS.

DISCUSSION ON EASTERN MEDITERRANEAN COUNTRIES' PRIORITIES AND RECOMMENDATION FOR CONSIDERATION BY GFCM/SAC AND THE EASTMED PROJECT

48. As there was only one representative from the participating countries within the foreseen Eastern Mediterranean Sub-regional project (EastMed), the Sub-Committee agreed that it would not be appropriate at this time to discuss socio-economic priorities and recommendations for the Sub-regional project. However, the participants welcomed the initiation of the project and the inclusion of socio-economic activities within the project's plan of work. The participants invited the project to benefit from the experiences learned and methods developed within the three existing GFCM Sub-regional projects and to participate in the SCESS network.

SUGGESTIONS AND WORK PLAN FOR THE FOLLOWING YEAR

Suggestions to SAC

49. In summary, the SCESS suggested to the SAC the following for consideration:

- That Member countries facilitate the collection of relevant data on import and export flows from and to Mediterranean and EU countries, among other trade data, to promote analyses of market situations affecting fisheries management.
- That Member countries collect relevant exploratory information on recreational fisheries to understand the relevance of recreational fisheries within the national economies.
- Form a sociological indicators working group within each sub-region to 1) define national sociological information needs, 2) implement case studies, and 3) to work toward the definition of the GFCM minimal list of indicators for use within the Operational Units matrix.
- That Member states inform about their progress on the socio-economic data collection and other relevant activities.
- Reconsider the organization of a workshop on the use of socio-economic indicators in fisheries management.
- For those countries having sufficient socio-economic data, it is requested that specific advice for fisheries management be formulated and presented to the SCESS.
- That the SAC-approved fleet segmentations be formally adopted by GFCM.
- That Sub-regional projects benefit from the information dissemination models provided by AdriaMed (e.g. Web site and legal information database).

Suggestions to SCESS

50. In summary, the participants suggested to the SCESS the following for consideration:

- Update the FAO Fisheries Circular No. 978 "The Fish Trade of North African Mediterranean Countries", by expanding the scope of the study to include all Mediterranean countries and to reflect changes within the legal and political situation within the GFCM countries.

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- Undertake an analysis of the legal frameworks regarding recreational fisheries amongst GFCM countries.
- Undertake an exploratory survey of the socio-economic status of recreational fisheries amongst GFCM countries.
- Further analyse the impacts of national and international market forces (both demand and supply side) on the fisheries industries and fisheries management. Potential studies identified included evaluating the role of markets in controlling fishing effort as recommended by SCSA in GSA 03, 05, 06, and 17.
- Publication of “post-survey reflections” to improve the Albanian sociological survey and the extension to other GFCM countries (e.g. Montenegro) of such an improved survey.
- To update FAO Fisheries Circular No. 927, “The Economic Status of Mediterranean Capture Fisheries and Aquaculture”.
- To draft a workbook on the use of socio-economic indicators in fisheries management.

Suggestions to SCSI

51. In summary, the SCESS suggested to the SCSI the following for consideration:

- That technical assistance be provided to harmonize existing national fleet segmentations to the SAC-approved fleet segmentations (GFCM Task 1).

OTHER MATTERS

52. The SCSI invited the SCESS to participate in a bilateral workshop to discuss the OU matrix defined by GFCM Task 1.

53. The SCESS provided some comments, primarily about the possible methodologies applicable to estimate data by OU where data are collected only by fleet segment, without specific gear information. Therefore, it was suggested to include into the guidelines specific methods to assist in such estimation. Based on this suggestion, SCSI will prepare updated draft guidelines for review and comments by SCESS.

ADOPTION OF REPORT

54. The report was approved by the participants on 14 September 2006.

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ANNEX 1.

Agenda

- 1 Opening and arrangement of the Meeting
- 2 Adoption of the agenda
- 3 Review of the recommendations of the thirtieth session of GFCM, the eighth session of the SAC
- 4 Analysis and Review of intersessional activities:
 - 4.1 Workshop on Standardization of Measurement of Fishing Effort (Malaga, May, 2006)
 - 4.2 Workshop on Stock Assessment and Operational Units (Rome, June, 2006)
- 5 Progress concerning the Mediterranean fisheries regulations and legislative aspects
 - 5.1 Regional database on bottom trawl fisheries regulations in the Adriatic Sea.
 - 5.2 Web Data Bank on the Adriatic fisheries legislation.
- 6 The Market forces in the Mediterranean fishing sector
 - 6.1 “Towards a Mediterranean free trade area. Fish trade relations within the Mediterranean basin”
 - 6.2 “Analysis of swordfish commercialization between Morocco and Spain
- 7 Development of sociological indicators for the Mediterranean fisheries
- 8 Legislative and socio-economic status of recreational fisheries in the Mediterranean
- 9 The use of socio-economic indicators in fisheries management
 - 9.1 “Analysis on the status of demersal fisheries in the North and Central Adriatic Sea from an economic and social point of view”.
 - 9.2 “Socio-economic aspects of the Moroccan Mediterranean fisheries”.
- 10 Discussion on Eastern Mediterranean Countries’ priorities and recommendations for consideration by GFCM/SAC and the future EastMed project
- 11 Conclusions and recommendations, including the 2007 work program addressed by the SCESS;
to the SCESS
to the SAC
- 12 Other matters
- 13 Adoption of the report

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ANNEX 2.

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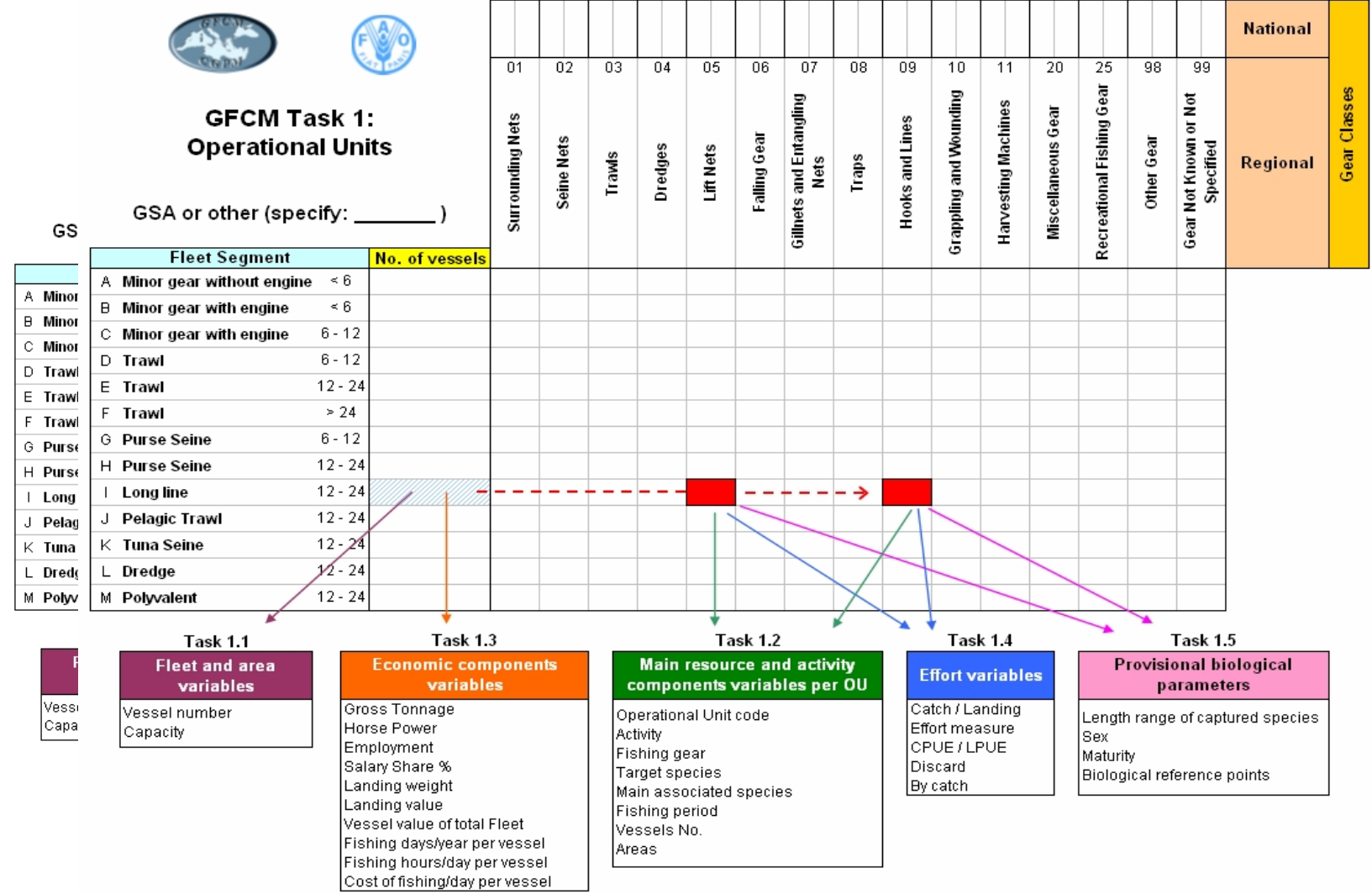
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ANNEX 3. GFCM Task 1 – Operational Units



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ANNEX 4. Sociological indicators collected and analysed within the Albanian sociological survey

Sociological data

Items
<p>1. Personal data</p> <ul style="list-style-type: none"> • Age • Gender • Educational level (highest scholastic qualification) • Task, position in the crew • Previous job • Future job • Part time job (sector of activity, time spent, reason, % of income...) • Father's job • Household members by numbers, age, gender, job • Fish consumption by household (weekly) • Minimum earnings provided to family livelihood (share of savings on salary)
<p>2. Fishing strategy</p> <ul style="list-style-type: none"> • Decision level (community, vessel owner, crew members,...) • Objectives (profit, household survival, cost efficiency, ...)
<p>3. Crew</p> <ul style="list-style-type: none"> • Crew by status • Crew by age and gender • No. of relatives • Kind of payment (salary, % of sales, other) • Time of payment (week/month; beginning/end of period) • Shared costs
<p>4. Membership in fisheries institutions</p> <ul style="list-style-type: none"> • Type (owner association, trust union, other local institution) • Purposes and activities, frequency, degree of satisfaction, ... • Decision making (mechanism, power, enforcement, ...) • Local community identity and cohesion (places, events, institutions) • Non-fishery local institution (frequency and kind of relationship) • Market and sales channels • Market information • Trade relationship (formal/informal, customary relation, etc) <p>Inter-maritime district relationships</p> <ul style="list-style-type: none"> • Kind of relationship (cooperation, competition) • Other linking factors (Labour migration, Information, Common association, Shipyard, repair, Services, Trade market)

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ANNEX 5.

Terms of Reference for a Proposed Workshop on the Use of Socio-Economic Indicators in Fisheries Management

Economic conditions are one of the factors guiding the decisions within fishing management. Unfortunately, the necessary economic information is not always available for use in fisheries management in the GFCM area. To address this issue, a minimal list of economic indicators for use in fisheries management was defined by SCESS and approved by SAC for application throughout the region.

Under the initiative of SCESS and with the support of the AdriaMed and CopeMed projects, pilot studies were undertaken in recent years to provide for data collection and the estimation of economic indicators in various GFCM countries.

The time has now arrived to test the use of acquired indicators in actual fisheries management scenarios. A technical workshop will provide the forum for the analysis of real data and the evaluation of practical management situations where the use of these indicators can contribute to the adoption of fisheries management decisions.

As part of the preparatory work for this proposed workshop, the following activities would be undertaken:

- The preparation of a workbook to process available data in a way useful for providing information to fisheries managers. These guidelines would cover the following topics:
 - Use of indicators for bio-economic models
 - Use of indicators to establish hierarchy on fleets in relation their profitability, employment or other criteria
 - Use of indicators to predict the economic and social impact of the adoption of measures as fleet reduction, time reduction, or licenses redistribution between fleet segments
 - Use of indicators to establish compensation under action plans projects to involve and stimulate the fishermen participation.
 - Use of indicators and reference points in trends analysis
- The elaboration of case studies by each invited national researcher in which existing management proposals could be analyzed in fisheries sectors having the required economic indicators. The pre-workshop elaboration of national case studies will assure the existence and availability of the relevant data.

These reports would be presented during the workshop and the case studies analyzed by the workshop participants with the aim of developing precise management recommendations.

The Workshop would produce a final report highlighting key findings, management recommendation, and conclusions of the workshop, a finalized workbook, and recommendations for further work, if warranted.

Researchers from the GFCM area with the necessary experience for undertaking such an exercise will be invited to participate in the Workshop. Contributions from individuals outside the GFCM area may be enlisted to share their experiences in the use of socio-economic indicators in fisheries management.