Editorial/*Editorial*

Which Fishery Policy for the Mediterranean Sea?

PERE OLIVER*

The Mediterranean region is characterized by a long and active tradition of fishing, large and seasonally increasing coastal populations, and long-standing high demand and prices for locally caught fish. The strong demand for seafood and the long history of fishing have resulted in heavy fishing intensities over most shelf areas. This high fishing intensity, together with the generally narrow coastal shelves and vulnerability of resources, would have led one to expect declining catches over most shelf areas, yet this had not occurred until recently. For this reason it was commonly said that Mediterranean fisheries were in a permanent situation of "sustainable overfishing". However, since the mid 90s capture fisheries landings has started to decline, mainly in the northern part and at this moment practically nobody is seriously discussing that fleets are over-fishing the resources and that some of these resources are already over-fished. In consequence, measures to correct this situation are needed, starting with a reduction of effort and/or the activity of fishing fleets.

Looking around the Mediterranean region

If we take into consideration not only those most common indicators as they are the fisheries landings and the fishing effort, but those referred to the fishing fleets characteristics, the economical aspects, the employment and the consumption of fishing products, and even if the information is scarce and not always consistent, we can identify two groups of countries in the region performing two models of fisheries. A reduction of fishing effort and/or fishing activity is recommended in the northern countries and in fact is in course since 1990. However the fishing fleets in the non EU countries are continuously growing and improving their technology. The consumption and demand of fishing products, high and growing in the northern countries, is relatively low in the rest, mainly in the southern part.

At the same time, in many EU countries the costs are going up because of the need to improve fishing techniques and incomes go down or remain stable because of the reduction resources. For these reasons fishermen are continuously looking for subsidies and other economic aids. This phenomenon has an impact on the wages and when the wages go down, many crews go outside of the activity to find better wages in other sectors. This fact is actually jeopardizing the future of fisheries mainly because there are no new people interested in working in fisheries.

Regarding the trade of fishing products, two models can be also identified in the Mediterranean region. On the one side the EU member countries which are "importer countries" and in the other side the southern countries and Turkey that are "exporter countries". This process of development of fisheries can jeopardize it in the future, because given the limitation of resources, only if the level of production is maintained will it be possible to assure the positive contribution of fishing to development in southern countries.

The European Common Fisheries Policy

The European fishery sector, which currently accounts for 0.2% of GNP and 0.4% of employment, is not an important economic activity in the European Union. In fact, the sector's contribution to the gross national product of member states is generally less than 1%; however its impact is highly significant as a source of income in areas where there are few employment alternatives. In addition, the fishery sector helps to supply fish products to the EU market, one of the largest in the world.

In fact, with a production of 7.6 million tones of fish in 2002, from fisheries and aquaculture, the EU is the world's third largest fishing power after China and Peru. Yet, while 3.9 million tones of fish products were exported, 4.3 million tones had to be imported to meet the needs of the EU in 2001 (10 new members included). That means, in economic terms, a deficit of over € 4 billion.

The EU fishing fleets comprise more than 95 000 vessels, which vary greatly in size and fishing capacity or potential catching power. Fleet capacity has declined over the past few years because it was too large for the available fish and was becoming uneconomic. The EU has facilitated the transition towards a better balance between fishing fleets and resources.

Fishing provides a variety of jobs. Although the number of fishermen in the EU – in both full-time and part-time jobs - has been declining over the years, some 260 000 fishermen are directly employed in catching fish. Their activities generate more jobs in processing, packing, transport and marketing on the production side and in shipyards, fishing gear manufacturing, chandlery and maintenance on the servicing side. These jobs form the backbone of many remote coastal areas all over the Community's coast.

At the beginning of the EU (Treaty of Rome, 1956) marine resources were considered to be a common resource, and free access to all member countries was assured. Every fisherman is, therefore, vulnerable to the actions of the others. Today fish stocks continue to be regarded as a common resource, but the need to manage them collectively is obvious.

The first common measures in the European Union fishing sec-

* Instituto Español de Oceanografía – Palma de Mallorca (Spain)

tor date from 1970. They laid down rules for access to fishing grounds, markets and structures. It was agreed that, in principle, Community fishermen should have equal access to Member States' waters. However, in order to ensure that smaller vessels could continue to fish close to their home ports, a coastal band was reserved for local fishermen who have traditionally fished these areas. Measures were also adopted for a common market in fisheries products and a structural policy was set up to coordinate the modernization of fishing vessels and on-shore installations.

All of these measures became more significant when, in 1976, Member States followed the international movement and agreed to extend their rights to marine resources from 12 to 200 nautical miles from their coasts. Member States also decided that the Community was best placed to manage fisheries in the waters under their jurisdiction and to defend their interests in international negotiations. As a result of this decision and after years of difficult negotiations, the CFP came into being in 1983. This policy was developed with a view to managing fisheries for the benefit of both fishing communities and consumers.

The common rules are adopted at Community level and implemented in all member states in four main areas:
- Conservation to protect fish resources by regulating the amount of fish taken from the sea, by allowing young fish to reproduce, and by ensuring that measures are respected.
- Structures to help the fishing and aquaculture industries adapt their equipment and organization to the constraints imposed by scarce resources and the market.
- Markets to maintain a common organization of the market in fish products and to match supply and demand for the benefit of both producers and consumers.
- Relations with the outside world to set up fisheries agreements and to negotiate at the international level within regional and international fisheries organizations.

Common Fishery Policy Today

When the CFP was adopted, a mechanism of periodical revisions was established. The first CFP review conducted in 1992 showed that there were too many vessels for the available resources and that overfishing cannot be prevented through technical measures alone. Consequently, in order to make the common fishery policy more effective the decision was taken to reinforce the links between their various components: markets, structures and resources. Control measures were introduced to ensure that rules are respected throughout the industry and new technologies are now used to transmit data to the authorities and to monitor larger vessels through satellite tracking systems.

However, the 2002 review has shown that the results are still unsatisfactory. In short:
- The total catch allowed to be taken from the resource (TAC) system succeeded in avoiding the collapse of resources, but was unable to ensure that stocks recover;
- The Multi-Annual Guidance Programs (MAGP) for the fishing fleets avoided an increase in fishing fleets but did not promot the necessary reduction effort.
- Profits have not improved and some segments have had difficulty maintaining their levels of employment and economic sustainability;
- Wages and working conditions have not improved at same rate as in other sectors;
- Consumer dependence on imports has increased;
- The resources allocated by the Commission (0.6% of their budget) has not produced the results expected, and the sector's dependence on public transfers has remained at the level registered at the beginning of the CFP; furthermore, additional state contribution has been necessary;
- The enlargement of the EU with ten new member countries is a new reason for revising the cost of the CFP.

For these reasons, the efforts made to date need to be reviewed and stepped up. Subsidization within the EU will be maintained only for aspects that do not improve fishing capacity. This entails eliminating the financial support for building new fishing vessels or for modernization.

The review evidenced the difficulty in reaching a consensus. The main questions on the table at that moment and the agreements reached were:
- Which are the EU common waters? The decision taken is to maintain the 12 nm reserved for the fleets of the coastal country, however some large industries demand that the coastal area be included in the common waters
- What kind of subsidies need to be maintained? The agreement reached was to maintain financial support, but only where fishing effort has not increased. In this scenario, subsidies for modernization and new construction are over.
- Is it convenient to maintain relative stability or it is necessary to establish a common market of fishing rights? Relative stability is being maintained for the moment, but the Commission will allow each country to decide whether or not to leave fishing market rights open.
- What kind of commercial control? Some big industries prefer a low degree of control while small and medium enterprises prefer to ensure stringent control over quality and product identification.
- What kind of consumer warranties? Consumers call for stricter control, but some enterprises prefer not to make too much information on their products available.
- What support can be given to joint ventures? No decision has been adopted at the moment on this subject.
- What type of international agreements, what type of financing, what type of control? The EU will maintain its traditional position in favor of political agreements.

The CFP and the Mediterranean fisheries

Fishing in the seven EU Mediterranean member states (Cyprus, France, Greece, Italy, Malta, Slovenia and Spain) employs some 150 000 fishermen in all of their fisheries (up to 50 % or even more of all Community fishermen, an important proportion of whom work in Mediterranean fisheries), on around 70 000 vessels (up to 50 000 of which, half of the total number of Community vessels, operating in Mediterranean waters). The annual catch of these countries totals over 2 million tones, more than 40% of the total catch of European countries. Up to 500 000 tones of these catches are captured in the Mediterranean; that is more than 10 % of the Community's production in volume and much more in value.

The total fish capture production of the Mediterranean countries in 2002 was 4 355 000 tones. The main part of this production, over 1 million tones each, corresponds to Spain and Morocco. However, their fishing fleets are mainly operating outside of the Mediterranean. Spain landed around 100 000 tones from the Mediterranean fisheries. France is also mainly fishing outside of the Mediterranean (700 000 tones) with almost 40 000 tones caught in the Mediterranean. The fleets of Turkey and Egypt are also mainly fishing in the Black and Red Seas landing a total of 566 000 and 425 000 tones respectively. The total production of fleets of Mediterranean countries operating in the Mediterranean Sea was, in 2002, almost 900 000 tones. Italy with 272 000 tones, 241 000 of them from the Mediterranean fisheries is the country with a highest Mediterranean Production. The Greek landings were almost 90 000 tones and Tunisia and Algeria landed almost 100 000 and 134 000 tones respectively. The production of the rest of countries is relatively limited. For this reason the EU is actively involved in negotiations with Mediterranean coastal states and other parties with a view to enhancing cooperation in scientific research and devising conservation measures for the entire Mediterranean.

The fishing pressure and the threat of pollution in this densely populated area make Mediterranean-wide conservation measures even more necessary. The CFP components concerning markets and structures which apply in the Mediterranean do not differ substantially.

Except for tuna, which is relative easy to control and is exploited by a limited number of vessels, the Mediterranean is not affected by the TAC system at the moment, mainly because of the large number of species and the difficulty in controlling landings.

It is generally agreed that the Mediterranean needs to be managed through effort control, and it is also agreed that in many fisheries the national, regional or local regulations, when more restrictive, can coexist with a more general regional regulation without causing problems. This situation has called for additional management measures for the Mediterranean Sea. An EC Council Regulation (No 1626/94) was adopted in 1994 on certain technical measures for the conservation of marine resources in the Mediterranean, and in 2000 a new regulation was adopted amending the first one. Both regulations establish mainly which gears are allowed to be used and their characteristics, the minimum size of landing for some species and areas and seasons closed to fisheries. However, these Regulations are considered not enough to ensure the sustainability of Mediterranean fisheries, mainly due to the excessive number of derogations adopted. It is at all events important to point out that part of the fishing sectors in some countries are still calling for the adoption of new derogations!

A process to improve the Mediterranean Fishery Regulation is in progress at the present time. An initial draft proposal appeared in 2003 , eliciting a strong reaction from the fishery sector, national fishery administrations and even fishery scientists. The proposal tries to regulate the same aspects as are included in Regulation 1626/94 but incorporating new aspects - fishing protected areas, recovery plans, non-commercial fishing and the Malta fishing area.

An agreement has not yet been reached on this new Regulation, and the Mediterranean will probably continue to be "managed", in the meantime, through an effort control system together with a series of technical control measures on gears, minimum landing sizes, Protected Areas, etc.