SOCIO-ECONOMIC ANALYSIS on
FISHERIES RELATED TOURISM in EUSAIR

NEMO PROJECT 1M-MED14-11
WP2
ACTION 2.3
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Contents

1. Introduction .......................................................................................................................... 4
   Rationale ............................................................................................................................... 6
2. Fisheries & Tourism statistics ............................................................................................... 8
   Data on EU level .................................................................................................................... 8
   Croatia .................................................................................................................................. 10
   Greece .................................................................................................................................. 17
   Italy ....................................................................................................................................... 20
3. Methodological issues ......................................................................................................... 27
4. Survey & focus groups results - Impact of fisheries related tourism .................................... 30
5. Linkages between socio-economic growth and fisheries-related tourism: FLAGs and Good
   Practices ................................................................................................................................. 46
   FLAGs in partners’ countries ............................................................................................... 46
   Good Practices ....................................................................................................................... 59
6. Conclusions - Recommendations ....................................................................................... 68
   References ............................................................................................................................ 71
   ANNEX I: Glossary of terms ................................................................................................. 72
   ANNEX II: Questionnaires .................................................................................................... 74
   ANNEX III: Lists of Stakeholders ......................................................................................... 91
1. Introduction

A macro-regional strategy for the Adriatic and Ionian region (EUSAIR)¹ aims at bringing a new impetus for co-operation and investment to the benefit of all involved territories. Moreover, the EUSAIR is intended to significantly contribute to the EU integration of the candidate/potential candidate countries in the region. This strategy aims to promote sustainable economic and social prosperity of the Adriatic and Ionian region through growth and jobs creation, by improving its attractiveness, competitiveness and connectivity while at the same time preserving the environment and ensuring healthy and balanced marine and coastal ecosystems. EUSAIR has integrated the Maritime Strategy for the Adriatic and Ionian Seas adopted by European Commission² into a wider Strategy that extends beyond the maritime dimension also covering the hinterland.

The EUSAIR is built on four thematic pillars: Blue Growth, Connecting the Region, Environmental quality and Sustainable tourism. Sustainable tourism is not as developed as it should be in the Region. Tourism activities are not always managed properly, which can have a negative impact on the coastal, marine, and hinterland environment. A commercial yet sustainable approach needs to be developed.

According to the European Commission (2012) “tourism is economically significant as one of the main and fast-growing maritime activities. It strongly benefits the regional economy by creating jobs and promoting the conservation of coastal and maritime cultural heritage”. Within the tourism sector, coastal tourism is by far the most significant in terms of visitor numbers and income generated. Among tourist destinations, coastal areas are most favored by tourists, and the Mediterranean region is the world’s leading tourist destination. According to the World Tourism Organisation (WTO), one-third of global income from tourism is generated in the Mediterranean region.

² COM/2012/713 Final.
The current socio-economic challenges facing the fisheries sector in Europe call for a wide range of measures to improve the livelihoods of fishermen and their families, as well as other inhabitants of fisheries communities. The diversification into tourism activities of fisheries-dependent communities and families is supported by European Fisheries Fund (EFF) Axis 4. Axis 4 supports the “sustainable development of fisheries areas” through strategies drawn up by local partnerships represented in Fisheries Local Action Groups (FLAGs). All these activities are supported by FARNET (EU Fisheries Areas Network). FARNET brings together all fisheries areas supported by priority Axis 4 of the EFF. Since fisheries areas across the EU and especially at EUSAIR level are confronting significant challenges, we tend to agree with the position of FARNET (2011) that “a decline in income and employment in the fishing sector has underlined the urgent need for new, sustainable and inclusive solutions. Europe’s oceans, seas and inland waters, and the environmental and cultural assets linked to them, represent a vast and rich resource which can provide new opportunities for economic and social renewal. A key challenge, therefore, is to re-evaluate the potential of these assets in order to identify and develop new, more diversified and more sustainable economic activities and employment”.

The project “NEtworking for the developMent of maritime tOurism at EUSAIR level – NEMO” focuses on fisheries related tourism, which can be defined as a set of tourism-related activities carried out by professional fishermen in order to differentiate their incomes, promote and valorize their profession and socio-cultural heritage, and enhance a sustainable use of marine ecosystems, by means of boarding non-crew individuals on fishing vessels. Fishing tourism has received increasing attention in recent years, and several national and international projects have included this issue among their key actions. However, although very promising, the fishing tourism sector is still in its infancy stage at the EUSAIR level, as indicated also by the results of the institutional study. The high socio-economic and conservation potential of fishing tourism demands for a better regulation,

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3 See 2.1 Report of the project
coordination and integration of the sector, at the regional, national and international level.

**Rationale**

According to Abdrabo and Hassaan (2003, p. 5) a socio-economic analysis is a way to learn about the social, cultural and economic conditions of individuals, groups, communities and organisations. In our case, we make the effort to identify these parameters at EUSAIR level and especially in the three countries participating in this project: Croatia, Greece and Italy. Given that there is no fixed list of topics that are examined in a socioeconomic assessment, however the topics we will try to illuminate are: stakeholder characteristics; stakeholder perceptions from the consultation meetings and their responses to survey including interviews and round tables at the focus areas; statistical data and market attributes. Very important is also the assessment of social and macroeconomic impacts (employment, growth) of fisheries related tourism as well as its impacts on environment.

This study aims to identify possible gaps and obstacles, to assess impacts and provide its future scenario in Adriatic-Ionian basin. This report presents the results of a study that has applied a common methodological framework in selected locations within three fisheries-dependent maritime regions of the EU and especially within the Adriatic Ionian macro-region: regions of Marche, Emilia Romagna and Apulia (Italy), Split County (Croatia) and regions of Western Greece, Epirus and Ionian islands (Greece).\(^4\)

The outputs from this study provide further evidence of the social and economic profiles of maritime communities and fishers from key fisheries dependent regions of Adriatic and Ionian macro-region. This in itself represents a useful contribution to understanding the local dynamics of these areas while the communities themselves have expressed interest in the outputs of the local studies.

\(^4\) See the relevant maps in the next chapter.
Picture 1: Fishermen’s Cooperative of Preveza - Divari of Mazoma - GREECE

Picture 2: Seashells from Institute of Oceanography and Fisheries of Split (IZOR) - CROATIA
2. Fisheries & Tourism statistics

This chapter provides some demographic and statistical data for every analyzed region, such as: population, fishery indicators, evolution of the number of vessels, employment and also data on tourism (tourism indicators, international tourists’ arrivals etc.).

Data on EU level

Fishery statistics are collected from official national sources either directly by Eurostat or indirectly through other international organisations for other countries. Fleet structure, fishing activity, catches of fishery products and also employment and income in fisheries sector include items taken for all purposes (commercial, industrial, recreational and subsistence) by all types and classes of fishing.

Some 74% of the catches made by the EU-28 in 2012 were in the north-east Atlantic, with the Mediterranean and Black sea the second largest fishing area.

The five largest aquaculture producers among the EU Member States were Spain, France, the United Kingdom, Italy and Greece, which together accounted for around three quarters (76.0%) of total aquaculture production in 2012.

In the following table are presented the total catches and the aquaculture production of the three countries-partners in NEMO project -Croatia (HR), Greece (EL) and Italy (IT)- for the years 2002, 2011 and 2012.

<table>
<thead>
<tr>
<th></th>
<th>Total catches in all fishing regions</th>
<th>Aquaculture production</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU-28</td>
<td>6 136</td>
<td>4 832</td>
</tr>
<tr>
<td>EL</td>
<td>93</td>
<td>63</td>
</tr>
<tr>
<td>HR</td>
<td>21</td>
<td>71</td>
</tr>
<tr>
<td>IT</td>
<td>266</td>
<td>213</td>
</tr>
</tbody>
</table>

In the next figures we can see the evolution of the vessels in EU from 1995 to 2014, and the employment in the fisheries and aquaculture sector in EU for 2011.

Figure 1: Evolution of the number of the vessels in the EU fishing fleet (1995-2014)\(^6\)

Figure 2: Employment in the fisheries and aquaculture sector in EU countries (2011)\(^7\)

\(^6\) The figure is taken from EC 2014b, p. 13.

\(^7\) The figure is taken from EC 2014b, p. 16.
Croatia

General

The surface of the Republic of Croatia is 87.661 km² and it comprises 56.594 km² (64,5%) of land area and 31.067 km² (35,5%) of territorial sea. With a total population of 4.284.889 (census 2011), the average density in Croatia is 75,7 inhabitants/km². Around 60% of the population inhabits urban areas, and almost a quarter of the entire population lives in the capital, Zagreb.

According to the data of the State geodetic directorate and Croatian hydrographical institute, the total length of the Croatian border is 3.318,58 km. The length of the continental border is 2.370,5 km. The total length of the coastline is 5.835 (mainland 1,777 km and islands 4.058 km). Total number of islands is 1.246, whereof 48 are inhabited (according to data from Statistical annual of 2011, based on 2001 census).
Croatian GDP is EUR 43,591 million (2013) and the GDP/capita, EUR 10,249 (2013).

As in most Mediterranean countries, indicators on the national level point towards a low significance of fisheries sector for national economy. Also, it is estimated that the sectors’ real contribution is underrated and that, if the value of accompanying activities is included, the contribution to national GDP exceeds 1%.

In 2013 tourists realised 64,827,814 tourist nights: 7.9% by domestic and 92.1% by foreign tourists. The contribution of tourism sector to national GDP amounts was 16.5%.

Tourism on the coast and islands represents an economically significant activity, especially with seasonal openings of additional market for different products, where fisheries products have a significant role. Additionally, fisheries in conjunction with tourism offer also an added value to the tourist service. According to the national strategic guidelines related to tourism development, the objective is to develop tourism offer through high value-added services. Also, it is important to emphasize that most of the aquaculture segment is directly linked to the islands, and that it positively effects the development and sustainability of sensitive island communities.

Areas and communities which traditionally depend on fishing and which even today have characteristics of "fishing villages" in Croatia, especially on islands, represent also a significant asset in terms of developing the tourism offer in general.

Also, fishery is one of the most important economic sectors for very delicate island communities, providing the basic or additional source of income all year around, in all of its segments - catch, farming and processing. At the same time, fishing has a significant traditional cultural value, and as such is part of the identity of the islands’ population.

**Fisheries**

Global economic crisis which started in 2008 (in Croatia is still going on) has affected all segments of economy and society on the national level. Unfavourable economic trends on the global level were followed by significant increase of fuel prices on global market. Fishery, as a particularly sensitive segment of economy, also was
affected by negative economic developments. Production costs of economic operators in marine fishing have suddenly increased and became too high in comparison with the first sale prices which remained on the same level. The cost of fuel represents the largest individual cost in business activity of the economic entities engaged in marine fishing and it is estimated that between 50% and 60% of total income is spent on fuel. This represents the most significant barrier in achieving sufficient level of profitability.

Table 2: Key context indicators for the description of the fisheries sector in Croatia

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gross domestic product (2011)</strong></td>
<td>GDP: EUR 45,897 million</td>
</tr>
<tr>
<td></td>
<td>Share of the fisheries in the GDP: 0.2 to 0.7%</td>
</tr>
<tr>
<td><strong>Employment estimations (2011)</strong></td>
<td>About 14,000 people directly employed and 25,000 (when including also indirectly employed)</td>
</tr>
<tr>
<td></td>
<td>Estimations of employment in individual segments (e.g. different fishing gears, size of vessels, aquaculture types) with indication of trends (decreasing, increasing) are not available at present. However, socio-economic data should be systematically collected within the National Fisheries Data Collection Programme which starts in 2013.</td>
</tr>
<tr>
<td><strong>Croatian fishing fleet (2013)</strong></td>
<td>7,770 vessels (9.37% of EU fleet)</td>
</tr>
<tr>
<td></td>
<td>Total tonnage: 53,452 GT (3.14% of EU fleet) (average of 6.9 GT/vessel)</td>
</tr>
<tr>
<td></td>
<td>Total power: 426,064 kW (6.64% of EU fleet) (average of 55 kW/vessel)</td>
</tr>
<tr>
<td><strong>Catches (2011) – from commercial capture fisheries</strong></td>
<td>Marine: 70,535 tons</td>
</tr>
<tr>
<td></td>
<td>Inland: 50 tons</td>
</tr>
<tr>
<td><strong>Number of fishing permits for sport, recreational fishing, fishing tourism (2013)</strong></td>
<td>Sport fishing: 38 122</td>
</tr>
<tr>
<td></td>
<td>Recreational fishing: 44 155</td>
</tr>
<tr>
<td></td>
<td>Fishing tourism: 60</td>
</tr>
<tr>
<td><strong>Aquaculture (2011)</strong></td>
<td>Freshwater aquaculture:</td>
</tr>
<tr>
<td></td>
<td>• Total water area used: 9,721 ha of ponds and 61,361 m² of raceways</td>
</tr>
<tr>
<td></td>
<td>• Number of farms registered: 28 warm water farms and 27 cold-water farms</td>
</tr>
<tr>
<td></td>
<td>• Production: 6,283 tons of freshwater fishes</td>
</tr>
<tr>
<td></td>
<td>Marine aquaculture:</td>
</tr>
<tr>
<td></td>
<td>• Number of farms: marine fishes = 64 , marine hatcheries = 3 , shellfish = 254</td>
</tr>
<tr>
<td></td>
<td>• Production: 6,845 tons of marine fish 438 tons of mussels and oysters</td>
</tr>
<tr>
<td><strong>Consumption (2011)</strong></td>
<td>Estimated average individual consumption in kg per capita: 8.5 kg, 36.5% of EU average</td>
</tr>
<tr>
<td><strong>Foreign trade balance</strong></td>
<td>Imports: 38,417 t – USD 123,676,657 (2011)</td>
</tr>
<tr>
<td></td>
<td>Export: 38,493 t - USD 178,503,695 (2011)</td>
</tr>
</tbody>
</table>

8 Source: CBS, MFIN and MINAGRI-DoF
Marine Fisheries Act recognises the following categories of fishing: commercial, sports and recreational and fishing for scientific and educational purposes including fishing for public aquariums.

For sports and recreational fishing specific permits are issued. It is estimated that around 38,122 permits for sports fishing and around 44,155 permits for recreational fishing are issued on annual basis. It is estimated as well that the average annual catch in these segments is around 1,000 tones.

All the commercial fishing vessels are registered, regardless of their size. In 2011 the total number of fishing vessels was 4,136, including 3,484 vessels less than 12 m, and 652 above this size. The total power was 326,987 kW, of which about one third was the power of trawlers (about 155 kW per vessel on average), and one fifth, the power of purse seiners (about 206 kW per vessel on average).

The average age of Croatian fishing fleet is more than 30 years, but it is not equally distributed among all the segments. Average active trawlers are older than active purse seiners, while the trawlers are among the oldest active vessels. In addition to the age composition of the Croatian fishing fleet, it needs to be highlighted that most of the vessels are poorly equipped in terms of energy efficiency (old engines with high fuel consumption), product quality (lack of ice machines and adequate storage and cooling facilities on board) as well as equipment related to improvement of working conditions and safety on board.

The largest number of vessels is registered as multi-purpose (45.24% of the fleet). These vessels are typical for Mediterranean fisheries where there are no clearly defined target species and in which fishermen change gear during the year. In 2011, 226 vessels were active purse seiners, catching total of 64,389 tons of fish. In the same year, 562 vessels were active in bottom trawling, catching a total of 4,275 tons of fish. In 2011, catches of purse seine nets made 91.29% of total Croatian catches. At the same time 6.10% of the catch was caught using trawl nets while gillnetting...
achieved around 2% (24% of fleet registered for this gear). Percentages of other fishing gears are each represented with less than 1% of the total catch.

Over the past years, a decrease of catch per unit effort in trawl fishery was noted. On the other hand, in pelagic fishery (targeting small pelagics) indicators show that the structure of catches over the past years does not result in sufficient level of profitability (small landing sizes). These indicators suggest that in these types of fishing there is a need to consider the possibility of additional regulation of fishing effort in order to ensure long-term sustainability of stocks and ecosystems.

Commercial fishing can contribute to supply and to overall touristic offer through provision of species and products that go beyond the offer of the farming sector. Furthermore, sports fishery can contribute to enrichment of touristic offer. Both aspects can contribute to development of rural areas by providing employment and by contributing to the preservation of traditional, cultural, ecological and ethnological values. As different interest groups are concerned, there is a traditional conflict between the commercial and sports fishermen.

Marine fisheries act defines:

According to the data from Ministry of Agriculture, Croatia’s catching and aquaculture production in 2011 was 84,073 tons, in 2012 was 72,714 tons, and in 2013 was 85,713 tons.

<table>
<thead>
<tr>
<th>Year</th>
<th>IMPORT</th>
<th>USA</th>
<th>EXPORT</th>
<th>USA</th>
<th>BALANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>25,545</td>
<td>22,004,275</td>
<td>18,247</td>
<td>19,977,357</td>
<td>-7,208</td>
</tr>
<tr>
<td>2009</td>
<td>42,631</td>
<td>56,559,965</td>
<td>21,686</td>
<td>64,060,711</td>
<td>-26,945</td>
</tr>
<tr>
<td>2010</td>
<td>50,234</td>
<td>75,896,070</td>
<td>22,370</td>
<td>79,369,814</td>
<td>-33,914</td>
</tr>
<tr>
<td>2011</td>
<td>57,316</td>
<td>82,741,215</td>
<td>22,587</td>
<td>114,881,084</td>
<td>-34,629</td>
</tr>
<tr>
<td>2012</td>
<td>38,680</td>
<td>70,777,330</td>
<td>23,450</td>
<td>104,010,568</td>
<td>-15,150</td>
</tr>
<tr>
<td>2013</td>
<td>56,657</td>
<td>98,416,794</td>
<td>24,424</td>
<td>97,361,226</td>
<td>-20,263</td>
</tr>
<tr>
<td>2014</td>
<td>51,974</td>
<td>103,372,955</td>
<td>29,496</td>
<td>159,847,033</td>
<td>-22,478</td>
</tr>
<tr>
<td>2015</td>
<td>47,847</td>
<td>70,613,368</td>
<td>36,103</td>
<td>153,418,359</td>
<td>-17,254</td>
</tr>
<tr>
<td>2016</td>
<td>54,055</td>
<td>158,006,532</td>
<td>30,444</td>
<td>149,577,014</td>
<td>-24,611</td>
</tr>
<tr>
<td>2017</td>
<td>44,335</td>
<td>102,280,762</td>
<td>32,271</td>
<td>164,115,420</td>
<td>-11,864</td>
</tr>
<tr>
<td>2018</td>
<td>41,211</td>
<td>102,400,654</td>
<td>33,950</td>
<td>133,395,280</td>
<td>-7,211</td>
</tr>
<tr>
<td>2019</td>
<td>38,417</td>
<td>123,676,657</td>
<td>34,493</td>
<td>178,583,695</td>
<td>-7,663</td>
</tr>
</tbody>
</table>

*Source: Ministry of Finance - Customs administration*
*Analysis: MINAGRI-DoF*

Figure 3: Fisheries products balance from 2000 to 2011
Data on the number of employees in the fisheries sector are currently being estimated by taking into account data from crafts and trade registers, data on number of crew members and number of licences (vessels) in the fishing fleet of Croatia, as well as the data from the register of fish farms. It is estimated that approximately 14,000 people (fishermen, employees in companies involved in capture fisheries, farming and processing) are directly employed in the sector. In addition to the permanently employed, there are many seasonal workers, especially in the segment of employees on fishing vessels. It is estimated that around 25,000 people are involved in the sector, directly and indirectly. More precise data on employees in the fisheries sector will be available after the implementation of the National Fisheries Data Collection Programme.

Tourism

State of the art

- Over 925 thousand registered beds – 14% in hotels, 25% in camp sites, 15% in other accommodation facilities and 46% in private households (2013)
- Only 40% of hotel capacity within a high category (4 and 5 star)(2013)
- Over 64.8 million overnights in registered commercial accommodation (2013)
- 12.43 million tourist arrivals (2013)
- Every third overnight registered in private households accommodation (2011)
- Over 84,000 persons employed in the catering and tourism sector, close to 7% of total employment in Croatia (2013)
- 7.2 billion EUR worth tourism expenditures (6.3 billion foreign and 1 billion national)(2013)
- 16,5 % share of tourism in GDP (2013)
- Attributable to the pronounced seasonality of the product structure – 87% of all the overnights in Croatia take place in four summer months (June-September
- Concerning the structure of foreign tourist nights, the most of them (73%) were realised by tourists from Germany (24,2), Slovenia (10,3%), Austria (8,7%), the Chech Republic (7,6%), Italy (7,4%), Poland (6,8%), the
Netherlands (4,2%) and Slovakia (3,8%). Tourists from other countries realised 27,0% of tourist nights.

**Dominant tourist products**:\n- Sun and sea
- Nautical tourism
- Cultural tourism
- MICE tourism

**Products with the development perspective:**\n- Health tourism
- Cycle tourism
- Rural and mountain tourism
- Adventure and sports tourism
- Eco-tourism
- Gastronomy and enology

In the next figure we can see the foreign tourists arrivals in Croatia for the last year:\n
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9 Source: National Strategy of Tourism until 2020
10 Source: Croatian Bureau of Statistics
Greece

General

The surface of Greece is 131,957 km². Greece has the longest coastline on the Mediterranean Basin and the 11th longest coastline in the world at 13,676 km in length, featuring a vast number of islands (approximately 1,400, of which 227 are inhabited). With a total population of 11,123,034 (census 2012), the average density in Greece is 82 inhabitants/km².

Strategically located at the northeastern corner of the Mediterranean Sea, Greece forms the southern tip of the Balkan Peninsula in south-east Europe. The country consists of nine geographic regions: Macedonia, Central Greece, the Peloponnese, Thessaly, Epirus, the Aegean Islands (including the Dodecanese and Cyclades), Thrace, Crete, and the Ionian Islands. The Aegean Sea lies to the east of the mainland, the Ionian Sea to the west, and the Mediterranean Sea to the south. Eighty percent of Greece consists of mountains, of which Mount Olympus is the highest, at 2,917 m (9,570 ft).
The most important sectors of Greece’s economy in 2012 were wholesale and retail trade, transport, accommodation and food services (23.2 %), public administration, defense, education, human health and social work activities (21.2 %) and real estate activities (16.7 %).

**Fisheries**

A number of Greece’s coastal areas and islands are dependent on fisheries activities and are currently facing demographic and socioeconomic problems due to shrinking capacity, lack of basic infrastructure, distance from the urban centers, low population density, ageing populations with low adaptability to new technologies and low levels of education.

In 2012, the Greek fishing fleet consisted of 16,063 registered vessels, with a combined gross tonnage of 79,678 GT, a total engine power of 462,429 kW and an average age of 26.8 years. The size of the Greek fishing fleet decreased between 2008 and 2012, with the number of vessels falling by 9% and GT and kW by 6% and 9%, respectively. The main factor causing the fleet to decrease was the implementation of the fisheries policy to reduce of the number and capacity of vessels according to the Multiyear Orientation Programs for the Greek fishing fleet. In 2012, the number of fishing enterprises totaled 13,918 with the vast majority (88%) owning a single vessel. The number of enterprises decreased between 2008 and 2012 by 11%. Total employment in 2012 was estimated at 27,558 jobs, corresponding to 23,944 FTEs. The level of employment slightly increased between 2008 and 2012. This increase in employment may be related to different data collecting methodologies used over the time period, and it is possible that employment in FTE is underestimated for previous years (2008- 2011).
The Greek fishing fleet spent an estimated 2,815 thousand days at sea in 2012 and the quantity of fuel consumed totaled around 115 million litres. The total weight of landings was estimated at 93 thousand tonnes while the total value of landings was estimated at €427 million. Therefore, the average value of landings was 4.57 €/kg.

Regarding employment in fisheries the most significant changes by type of fishing tool are as follows:

- In 2012, employment recorded a decrease of 0.1% in comparison with 2011.
- In 2013, employment recorded a decrease of 1.7% in comparison with 2012.

More specifically, in 2011 the number of persons employed in sea fisheries amounted to 10,974 in 2011, 10,967 in 2012 and 10,777 in 2013.

### Table 3: Number of motor-propelled fishing vessels by category of fishery and type of fishing gear, 2011-2013

<table>
<thead>
<tr>
<th>Category of sea fishery and type of fishing gear</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>Change (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>5,737</td>
<td>5,842</td>
<td>5,803</td>
<td>-0.7</td>
</tr>
<tr>
<td>Overseas fishery</td>
<td>8</td>
<td>5</td>
<td>5</td>
<td>-0.0</td>
</tr>
<tr>
<td>Trawlers</td>
<td>8</td>
<td>5</td>
<td>5</td>
<td>0.0</td>
</tr>
<tr>
<td>Open sea fishery</td>
<td>554</td>
<td>547</td>
<td>536</td>
<td>-2.0</td>
</tr>
<tr>
<td>Trawlers</td>
<td>296</td>
<td>294</td>
<td>284</td>
<td>-3.4</td>
</tr>
<tr>
<td>Purse seiners</td>
<td>258</td>
<td>253</td>
<td>252</td>
<td>-0.4</td>
</tr>
<tr>
<td>Inshore fishery</td>
<td>5,175</td>
<td>5,290</td>
<td>5,262</td>
<td>-0.5</td>
</tr>
<tr>
<td>Seiners</td>
<td>271</td>
<td>244</td>
<td>239</td>
<td>-2.0</td>
</tr>
<tr>
<td>Other fishing vessels</td>
<td>4,904</td>
<td>5,046</td>
<td>5,023</td>
<td>0.5</td>
</tr>
</tbody>
</table>

### Table 4: Average annual employment by type of fishing gear, 2011-2013

<table>
<thead>
<tr>
<th>Type of fishing gear</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>Change %</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2013/12</td>
<td>2012/11</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>10,974</td>
<td>10,967</td>
<td>10,777</td>
<td>-0.1</td>
</tr>
<tr>
<td>Overseas fishery trawlers</td>
<td>128</td>
<td>88</td>
<td>89</td>
<td>1.1</td>
</tr>
<tr>
<td>Inshore fishery seiners</td>
<td>470</td>
<td>469</td>
<td>362</td>
<td>-22.8</td>
</tr>
<tr>
<td>Other vessels of inshore fishery</td>
<td>7,942</td>
<td>8,116</td>
<td>8,065</td>
<td>0.6</td>
</tr>
</tbody>
</table>

---

11 Source: Hellenic Statistical Authority
12 Source: Hellenic Statistical Authority
Tourism

In accordance to the Association of Tourism Enterprises of Greece (SETE), the contribution of tourism to the national economy in 2011 reached the 16.5% of the GDP offering 785300 working positions equal to the 18.4% of the total employment. Until 2019 it is estimated that employment can increase by 360000 positions covering the 100% of unemployment in 2009.

In relation to the global tourism, Greek tourism sector is performing rather well. In accordance to the World Tourism Organisation (WTO), Greece in 2011 ranked 17 in terms of international arrivals and 19 in terms of income. Also in accordance to the World Economic Forum (WEF), in 2011 Greece ranked 29 among 139 countries in relation to the Travel and Tourism Competition Indicator while based on the General Competition Indicator, Greece ranked 83.

These facts indicate that Greek tourism sector is one of the few Greek economic sectors, which contributes in Greece's competitiveness internationally. Greece welcomes a large number of international tourists every year.

Table 5: Foreign tourist arrivals in Greece

<table>
<thead>
<tr>
<th>Year</th>
<th>Arrivals</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>15,007,493</td>
<td>0,62%</td>
</tr>
<tr>
<td>2011</td>
<td>16,427,247</td>
<td>9,46%</td>
</tr>
<tr>
<td>2012</td>
<td>16,946,543</td>
<td>-</td>
</tr>
<tr>
<td>2013</td>
<td>20,111,406</td>
<td>18,68%</td>
</tr>
</tbody>
</table>

Italy

General

Italy is located in Southern Europe and is roughly delimited by the Alpine watershed, enclosing the Po Valley and the Venetian Plain. To the south, it consists of the entirety of the Italian Peninsula and the two Mediterranean islands of Sicily and Sardinia, in addition to many smaller islands. The sovereign states of San Marino and

13 Source: SETE, based on data provided by the Hellenic Statistical Authority and the Bank of Greece
the Vatican City are enclaves within Italy, while Campione d'Italia forming an Italian enclave in Switzerland.

The country's total area is 301,230 square kilometres. Including the islands, Italy has a coastline and border of 7,600 kilometres on the Adriatic, Ionian, Tyrrhenian seas (740 km) and borders shared with France (488 km), Austria (430 km), Slovenia (232 km) and Switzerland (740 km). San Marino (39 km) and Vatican City (3.2 km), both enclaves, account for the remainder.
The most important sectors of Italy’s economy in 2012 were wholesale and retail trade, transport, accommodation and food services (20.6 %), industry (18.4 %) and public administration, defense, education, human health and social work activities (16.9 %). Italy’s main export partners are Germany, France and the US while its main import partners are Germany, France and China.

Fisheries

In 2012, the Italian fishing fleet consisted of 14,433 registered vessels, with a combined gross tonnage of 166 thousand GT, a total power of 1,176 thousand kW and an average age of 28 years. The size of the Italian fishing fleet decreased between 2002 and 2012, with the number of vessels decreasing 11% and kW 9%. Over the same period total employed decreased 26%.

The largest part of the fleet is the small scale fleet, which is composed of vessels under 12m using passive gears only. They mainly use set nets, long-lines, pots and traps and are managed on a family and artisanal basis. This part contains around two thirds of all Italian fishing vessels (8,652), but due to their small size – on average around 2 GT per vessel - they only account for 9% of the total tonnage of the national fleet.

In 2012, the number of fishing enterprises in the Italian fleet amounted 9,142, with the vast majority (84%), owning a single vessel. Only 14% of the enterprises owned two to five fishing vessels and 1% owned more than six vessels (most of them represented by fishing cooperatives). Total employment in 2012 was estimated at 28,292 jobs, corresponding to 20,716 FTEs (Table 5.12.1; Figure 5.12.1).

The statistical data, especially for Marche region, have collected from the main sources: the Regional Statistic Department, the Infocamere data and the results of the overall census carried out by the National Statistical Institute on agricultural sector. In addition to this, the survey has been updated and data have been explained and elaborated on the basis of a 2011 draft publication on the Agro-food sector of Marche Region realized by the National Institute of Agricultural Economic (INEA) in cooperation with Marche Region- Environment and Agriculture Department.
in the framework of the regional Agro-food Observatory activities. Specific data on fisheries also derive from the FLAGs SWOT analysis in previous projects carried out by the Regional Fisheries Department.

Table 6: Active enterprises registered in local business trade registers in Marche Region

<table>
<thead>
<tr>
<th>Economic activities</th>
<th>Overall value</th>
<th>Var.%</th>
<th>% on total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture, Forestry and Fishery</td>
<td>23.866</td>
<td>-2,6</td>
<td>20,6</td>
</tr>
<tr>
<td>Agricultural, hunting and related services</td>
<td>31.897</td>
<td>-2,7</td>
<td>20,0</td>
</tr>
<tr>
<td>Forestry</td>
<td>246</td>
<td>3,3</td>
<td>0,2</td>
</tr>
<tr>
<td>Fishery aquaculture and related services</td>
<td>723</td>
<td>-1,2</td>
<td>0,5</td>
</tr>
<tr>
<td>Food industries</td>
<td>1.695</td>
<td>1,0</td>
<td>1,1</td>
</tr>
<tr>
<td>Total agro-food</td>
<td>34.561</td>
<td>-2,4</td>
<td>21,7</td>
</tr>
<tr>
<td>Total active enterprises</td>
<td>159.458</td>
<td>-0,2</td>
<td>100,0</td>
</tr>
</tbody>
</table>

Table 7: Fishing enterprises per activity and sector in Marche

<table>
<thead>
<tr>
<th>Fishing enterprises per activity and sector in Marche</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>Var. 2009-10 (%)</th>
<th>Var. 2010-11(%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registered</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sea fishing</td>
<td>671</td>
<td>671</td>
<td>663</td>
<td>0,0</td>
<td>-1,2</td>
</tr>
<tr>
<td>Freshwater fishing</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>0,0</td>
<td>0,0</td>
</tr>
<tr>
<td>Sea aquaculture</td>
<td>15</td>
<td>14</td>
<td>14</td>
<td>-6,7</td>
<td>0,0</td>
</tr>
<tr>
<td>Freshwater aquaculture</td>
<td>12</td>
<td>12</td>
<td>12</td>
<td>0,0</td>
<td>0,0</td>
</tr>
<tr>
<td>Total</td>
<td>741</td>
<td>738</td>
<td>727</td>
<td>-0,4</td>
<td>1,5</td>
</tr>
<tr>
<td>Active</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sea fishing</td>
<td>661</td>
<td>660</td>
<td>653</td>
<td>-0,2</td>
<td>-1,1</td>
</tr>
<tr>
<td>Freshwater fishing</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>0,0</td>
<td>0,0</td>
</tr>
<tr>
<td>Sea aquaculture</td>
<td>14</td>
<td>14</td>
<td>14</td>
<td>0,0</td>
<td>0,0</td>
</tr>
<tr>
<td>Freshwater aquaculture</td>
<td>12</td>
<td>12</td>
<td>12</td>
<td>0,0</td>
<td>0,0</td>
</tr>
<tr>
<td>Total</td>
<td>725</td>
<td>723</td>
<td>714</td>
<td>-0,3</td>
<td>-1,2</td>
</tr>
<tr>
<td>Registration</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sea fishing</td>
<td>16</td>
<td>11</td>
<td>3</td>
<td>-31,3</td>
<td>-72,7</td>
</tr>
<tr>
<td>Freshwater fishing</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Sea aquaculture</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>-100,0</td>
<td>-</td>
</tr>
<tr>
<td>Freshwater aquaculture</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>-100,00</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>17</td>
<td>13</td>
<td>3</td>
<td>-23,5</td>
<td>-76,9</td>
</tr>
<tr>
<td>Stoppage</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sea fishing</td>
<td>29</td>
<td>19</td>
<td>21</td>
<td>-34,5</td>
<td>10,5</td>
</tr>
<tr>
<td>Freshwater fishing</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Sea aquaculture</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Freshwater aquaculture</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>-100,0</td>
<td>-</td>
</tr>
<tr>
<td>Total</td>
<td>32</td>
<td>25</td>
<td>24</td>
<td>-21,9</td>
<td>-4,0</td>
</tr>
</tbody>
</table>

*Total does not match with lump sum of sectors because some enterprises have been included in “agriculture” classification.
Table 8: Food and beverage industry enterprises

<table>
<thead>
<tr>
<th>Food and beverage industry enterprises</th>
<th>NACE code</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fish and fish based products processing and stocking</td>
<td>2009</td>
<td>2010</td>
<td>2011</td>
<td></td>
</tr>
<tr>
<td>50</td>
<td>48</td>
<td>46</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fruits and vegetables processing and stocking</td>
<td>39</td>
<td>38</td>
<td>41</td>
<td></td>
</tr>
</tbody>
</table>

*In some cases the total number of enterprises of the sector is higher than its sub-categories because – at registration – some enterprises have been generally included in the general sector instead of the concerned sub-categories.

Fisheries sector in Marche: some figures

- 174 km of coast
- 8 ports with fishing fleets
- a total of 12 landing-points
- third-largest region in Italy by gross tonnage of shipping
- a fleet consisting of 890 boats
- 2.100 fishermen
- fleet equipped with midwater pair trawls, bottom trawls, mechanised dredges, rake trawls and purse seines
- a third of the national fleet of clam dredgers
- offshore fishing products: mullet, hake, baby octopuses, scampi, sole, clams and bluefish
- inshore fishing contributes 18% to the gross regional product
- inshore fishing products: whelks, cuttlefish, mantis shrimp and sole
- 37 companies processing fish products
- industrial zone for fishing technology.
In the Marche the sector is based on a well-established system of trade Associations which represent, protect and support the workers. The individual businesses, too, could not exist without this work. The Associations provide technical, legal, administrative, tax and insurance support. The Producers’ organisations have set up procedures for responsible management of the fish stocks.

- 7 Trade Associations which bring together almost all the people employed in fishing and aquaculture
- The only Italian Association for women in fishing (Penelope)
- 4 Consortia for the management of bivalve mollusks
- Seven Producers’ organizations recognised by the Ministry of Agriculture and Forestry, and three waiting to be recognized.

Table 9: Average number of fishing days in EUSAIR Coastal Regions 2012 (Sources – ISPRA, 2012)

<table>
<thead>
<tr>
<th>EUSAIR Regions</th>
<th>Bottom Trawl</th>
<th>Mid-water pair trawl</th>
<th>Purse seine</th>
<th>Draghe idrauliche</th>
<th>Small scale Fishering</th>
<th>Passive Polyvalent</th>
<th>Longlines</th>
<th>Totale</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calabria</td>
<td>153.04.00</td>
<td>124.08.00</td>
<td>-</td>
<td>105.08.00</td>
<td>80.05.00</td>
<td>-</td>
<td>112.02.00</td>
<td></td>
</tr>
<tr>
<td>Puglia</td>
<td>155.07.00</td>
<td>134.00.00</td>
<td>121.03.00</td>
<td>40.05.00</td>
<td>166.00.00</td>
<td>171.08.00</td>
<td>100.04.00</td>
<td>154.07.00</td>
</tr>
<tr>
<td>Abruzzo</td>
<td>107.09.00</td>
<td>84.09.00</td>
<td>89.01.00</td>
<td>104.04.00</td>
<td>-</td>
<td>-</td>
<td>2448.00.00</td>
<td></td>
</tr>
<tr>
<td>Molise</td>
<td>156.08.00</td>
<td>-</td>
<td>89.00.00</td>
<td>127.03.00</td>
<td>-</td>
<td>-</td>
<td>135.07.00</td>
<td></td>
</tr>
<tr>
<td>Marche</td>
<td>135.00.00</td>
<td>149.04.00</td>
<td>73.01.00</td>
<td>183.03.00</td>
<td>-</td>
<td>-</td>
<td>143.03.00</td>
<td></td>
</tr>
<tr>
<td>Emilia Romagna</td>
<td>74.09.00</td>
<td>154.00.00</td>
<td>-</td>
<td>127.00.00</td>
<td>83.03.00</td>
<td>-</td>
<td>87.08.00</td>
<td></td>
</tr>
<tr>
<td>Veneto</td>
<td>113.07.00</td>
<td>147.02.00</td>
<td>-</td>
<td>79.00.00</td>
<td>89.01.00</td>
<td>-</td>
<td>96.05.00</td>
<td></td>
</tr>
<tr>
<td>Friuli Venezia Giulia</td>
<td>101.05.00</td>
<td>125.03.00</td>
<td>85.01.00</td>
<td>64.08.00</td>
<td>123.07.00</td>
<td>-</td>
<td>114.02.00</td>
<td></td>
</tr>
<tr>
<td>Sicilia</td>
<td>155.07.00</td>
<td>-</td>
<td>125.07.00</td>
<td>-</td>
<td>118.08.00</td>
<td>120.08.00</td>
<td>113.08.00</td>
<td>125.03.00</td>
</tr>
<tr>
<td>Total</td>
<td>1149.56.00</td>
<td>709.09.00</td>
<td>539.28.00</td>
<td>561.15.00</td>
<td>1098.37.00</td>
<td>371.21.00</td>
<td>213.12.00</td>
<td>3414.37.00</td>
</tr>
</tbody>
</table>
Tourism

Tourism is one of Italy's most significant economic sectors accounting for 4.1% of Italy's GDP in 2012. Over the past 10 years, employment in the industry has risen from 4.6% of total employment to 5.2%, and in 2013 there were approximately 1.1 million people employed in the hotel and restaurant sectors alone (4.8% of total employment).

The great variety of tourism resources allows Italy to offer four-season tourism. According to the National Agency for Tourism (ENIT) in 2010 towns of historical and artistic interest attracted most of the visitors (45%), followed by the seaside with 17%, while mountain and lake locations together accounted for nearly 22%. Despite the fact that tourism is internationally recognised as a major strategic asset of the country, Italy has only recently developed an integrated strategy (the National Tourism Development Plan of 2013) to boost tourism competitiveness and productivity and turn it into a major source of revenues and a catalyst for growth and employment.

Blue Tourism is very well developed in Italy, thanks to the lengths of the coast and the number of lakes and rivers existing across the country. Most locations (e.g. Lago di Garda and Lago Maggiore in the North, the Venice Lagoon) are themselves highly attractive tourist spots with a qualified offer and infrastructures for different activities such as sailing and boating. Coastal tourism is a leading segment for Italian tourism. In 2010, the single largest number of bed places available in any European coastal region was in Venice, with 364,500 bed places available. In Marche region there are six fisheries related tourism enterprises, as in the following table.

<table>
<thead>
<tr>
<th>Enterprise</th>
<th>Location</th>
<th>N.place on board</th>
<th>Period of activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conti Alberto</td>
<td>FANO</td>
<td>8</td>
<td>from 01/05 to 31/10</td>
</tr>
<tr>
<td>Quattro Dame di Dolidze Lali e C.</td>
<td>FANO</td>
<td>12</td>
<td>All year</td>
</tr>
<tr>
<td>Quattro Dame di Dolidze Lali e C.</td>
<td>FANO</td>
<td>22</td>
<td>All year</td>
</tr>
<tr>
<td>Touring PescaItiturismo</td>
<td>GROTTAMMARE</td>
<td>4</td>
<td>All year</td>
</tr>
<tr>
<td>Berluti Marco</td>
<td>FANO</td>
<td>10</td>
<td>from 31/05 to 31/10</td>
</tr>
<tr>
<td>Cesaretti Perri</td>
<td>ANCONA</td>
<td>18</td>
<td>All year</td>
</tr>
</tbody>
</table>
3. Methodological issues

This chapter describes the methodology of the socio-economic analysis by introducing its three main parts, 1) desk study, 2) consultation meetings, 3) survey and also the criteria on which the socio-economic analysis is based.

There are various potential socio-economic assessment techniques that can be used to elicit the information (Bunce et al, 2000). These include:

- secondary data sources (e.g. reports and statistics);
- observation;
- consultation (e.g. with experts and key informants);
- questionnaire surveys (structured or semi-structured).

Our study is depended on certain criteria including stakeholders' attitudes and influences which are largely determined by their interests and power, respectively.

The methodology adopted in socio-economic analysis foresees:

- **Desk study**

The desk study has been used to identify the primary, secondary and key stakeholders on fisheries and tourism at regional level. The initial stakeholder lists has been compiled by reviewing reports from national and regional workshops and conferences and country/regional reports on fisheries sector. The desk study allowed the identification of the stakeholders operating at local, regional and national levels. The stakeholder identification form included:

a. Developing a list of all potential stakeholders

b. Identifying each stakeholder's interest and attitude towards the issue in hand

c. Estimating the level of power and the degree of influence of each stakeholder

d. Evaluating the need, and degree, of involvement of each stakeholder
- **Consultation meetings**

The NEMO project partners in each country were asked to arrange focus group discussions (consultation of stakeholders), inviting at least ten stakeholders who they believed to be key stakeholders in the fisheries and tourism sectors to the respective discussions. The key stakeholders were able to present information on their organizations at the relevant sessions and the interviews used to capture information from the stakeholders. Each focus group discussion began with NEMO project and the participants’ introduction and explanation of the objectives. The facilitator addressed the discussion and explained the meaning of ‘stakeholder’, ‘primary secondary and key stakeholders’.

- **Survey**

A survey form has been designed to meet objectives set out in the Monitoring Plan for each folder of NEMO analysis and has been validated by NEMO PTSC (Project Technical & Scientific Committee). The survey standard form (see attached) has been used to conduct interviews with stakeholders in each of the partnership area. The survey form submission has been carried out by e-mail, phone and face to face. The survey standard form has been used to target regional stakeholders and especially stakeholders who could not attend the focus group meetings.14

The findings of our survey are to be read in conjunction with the statistical data above, at European and national level, taking into account criteria as the evolution of fishermen income for the last 2 years, the employment / unemployment in fishery areas taking also into account gender issues.

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14 See the questionnaires addressed to fisheries and tourism sector in Annex II
Picture 3: Pesca-tourism trip from FARNET gallery photos

Picture 4: Fresh fish from FARNET gallery photos
4. Survey & focus groups results - Impact of fisheries related tourism

In this chapter the results of the survey and the focus group discussions are demonstrated. The results are presented separately by participating country.

Croatia

The results of the survey and the focus group discussions in Croatia indicate that:

- All of the respondents are at the age lower than 45.
- 66% of respondents have university education and 34% professional education. Age of the respondents is in the range from 18-30 (33%) or 30-45 (67%).
- The primary type of activity are:
  - commercial fishing and fishing tourism
  - fish processing
  - aquaculture
  - 80% of the respondents are professionally occupied in fisheries sector, and 20% have also another professional.
- The respondents belong to the following committee(s):
  1. Croatian Chamber of Economy

The tasks of the Croatia Chamber of Economy are: representation of economic interests before economic policy makers is achieved in the form of written materials, opinions on the respective measures or bills, active participation in Government or ministry sessions, either as a member or upon invitation, mandatory position statements for parliamentary committees – primarily on economic, budgetary, financial, labour and social policy issues.

  2. Croatian Chamber of trades and crafts

The tasks of the Croatian Chamber of Trades and Crafts are the following: promoting trades and crafts, representing tradesmen and craftsmen’s interests before state
authorities and in the forming of economic policies, providing state authorities with opinions and suggestions when passing regulations concerning trades and crafts.

3. Croatian Association for Sport fishing
Alliance encourages and promotes activities related to sport fishing at sea, organises competition between counties and state championships in angling and spearfishing...

4. SFC Big Game
Main goal is to promote sport fishing and make it an important part of general tourist offer.

5. Fishing cooperative
Gain market power when selling fish to buyers and to promote the industry's interests with government.

6. Group trawlers
Participate in solving the issue on national level.

- 67 \% of the respondents have 2-5 boats, 33\% have one boat; 50\% of boats have length >12m and 50\% of them <12m.
- For all respondents, their occupation in fisheries belongs to coastal and middle size fisheries.
- For 67 \% of the respondents’ average annual production (in tons) amounts 0-500 t. Others have average annual production more than 1001 t.
- 50 \% of the respondents have 0-6 employees, 16 \% have 6-10 employees and 34 \% of the respondents have more than 11 employees
- 67 \% of the respondents practice fisheries related tourism activities and expressed their interest for it. Also, they start with professional fishing almost at the same time as the tourist fishing. They use angling fishing equipment in touristic fishing. 33 \% start with professional fishing much earlier than with tourist fishing. The same percentage use trawler in touristic fishing. 33 \% of the respondents have no interest for fisheries related tourism.
- The average number of days spend in professional fishing with trawler is 206 days, in touristic fishing 38.5 days. The average number of days spend in
professional fishing with angling fishing equipment is 78 days, in touristic fishing 103 days.

- Tourist fishing have seasonal character, from May to November.
- Ratio between average daily catch in professional fishing with trawler and touristic trawling is 9:1. The same ratio is between average daily catch in professional fishing with angling fishing equipment and touristic fishing.
- Annual earning of professional fishing is 3x higher than annual earnings of touristic fishing (because of the seasonal character of fishing tourism)
- 50% of respondents provide to the tourist on board additional services such as beverages, already prepared food and education, 33 % of respondents additionally offers swimming in the sea. Only 16 % of respondents offers preparation of fish caught and sleeping aboard.
- The average number of tourists who daily board the trawler is approximately 30 tourists and average number of tourists who daily board the ship with angling fishing equipment is 3-6 tourists.
- The average number of tourists in last three years who participated in trawl fishing is 990 tourists and 137 tourists who participated in angling fishing.
- Tourists come from Germany, Italy, Sweden, Russia, Croatia, Ukraine, Czech Republic and Slovakia. Age structure of tourists are 5-75 for fishing net and 30-70 for fishing with angling fishing equipment, such as big game fishing.
- Price of participation in trawl fishing is approximately 50 euros for adults and 25 euros for children per person per trip. Daily duration in this type of touristic fishing is one and a half hour. Price of participation in fishing in big game fishing is 100 to 600 euros per person per trip. Dailly duration in this type of touristic fishing is six to eight hours.
- 57 % of respondents thought that legitimacy affairs is obstacles for fisheries related tourism, 25 % blamed the bureaucracy. 14 % of respondents answered “other”.
- 60 % of respondents attended training courses related to their profession activities, 40 % of them are not interest
• 60% of respondents prefer to attend training topics “new technologies in fisheries” and “related activities to fisheries”. Only 20% of them wish to attend to training topics such as “innovation applications” and “marketing procedures”.

• Professional Assessment:

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<th>Disagree</th>
<th>Fair</th>
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<tbody>
<tr>
<td>You are satisfied by your profession activities</td>
<td>40</td>
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<td>Do you believe that your profession activity has future as being now</td>
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<td>You get regular information on topics of your sector</td>
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<td>A parallel activity with tourism will help your sector</td>
<td>20</td>
<td>80</td>
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</tbody>
</table>

• 40% of the respondents have not had benefited from European or National Funded Programmes, 40% have had benefited and 20% of them tried unsuccessfully.

• The level of satisfaction with the level of development of infrastructure is low for 60% respondents, and fair for 40% of them.

• 100% of the respondents expressed the need for:
  o state support to fisheries sector,
  o financial support to fisheries sector by state-EU,
  o cooperation with other professionals, for training in innovation technologies

• 40% of the respondents are partially agrees with an estimated needs for parallel activities with other professional activities and 60% fully.
• 20% of the respondents disagreed with an estimated needs for combination between Fisheries and Tourism Sector and 80% fully.

Also, from the consultation meetings in Croatia we could conclude that:

(1) tourist fishing is an alternative to commercial fisheries
(2) a high potential for development of fishing tourism especially in the segment of trawling, which is the most common in Croatia
(3) performing the fishing tourism (with trawlers) - cleaning the seabed - significant ecological component
(4) performing of the tourist fishing - fishing operations presentation and culinary component
(5) modify fishing gear for tourist purposes (especially dimensions, size and the cut of the eye, as well as the duration of trawling)
(6) changing the regulation of trawl fishing in the canal areas (closed during the summer) in a way to devise specific spatial and temporal constraints for demonstration tourist fishing in prohibited areas for trawling
(7) education of tourists
(8) coordinations opinions and legal documents of the relevant ministries
(9) high price for obtaining the necessary permits and modification of vessels for tourism - insure financial instruments
(10) modify and harmonize existing Marine Fisheries Act and by-laws
(11) tracking the number of the day / catch spent in fishing tourism
(12) require the involment of the Croatian Register of Shipping, as an important actor in solving the overall problem.

**Advantages of the tourist fishing:**

• the financial impact
• reduced fishing effort
• extend the tourist season
• educate tourists
• relief of fishermen
Disadvantages:
- the problems with the procurement of licenses
- the high cost of making the necessary documentation
- the poor promotion
- the high dependence on weather conditions

Greece

In Greece the results of the survey and the focus group discussions indicate that:

- The respondents are from all ages
- 40% of respondents have university education and 44% professional education.
- The primary type of activity are:
  - commercial fishing and fishing tourism
  - fish processing, mainly salted fish and bottarga
- 80% of the respondents are professionally occupied in fisheries sector, and 20% have also another profession.
- The respondents belong to the following bodies:
  1. Fishermen’s cooperative of Klisova-Mesolonghi “Anagennisi”
  2. Fishermen’s cooperative of Tsoukalio-Rodia
  3. Fishermen’s cooperative of Logarou
  4. Fishermen’s cooperative of Preveza
  5. Aqua action-M&N Dimitriou

\[15\text{See http://en.wikipedia.org/wiki/Botargo}\]
Environmental and fishing tourism in the lagoon of Messolonghi - Aetoliko Group

6. Monastery of Rodia

Fishing tourism in the lagoon of Rodia.

7. Aitoliki FLAG

Implementation of Axis4, funding fisheries related tourism activities.

8. Epirus-Amvrakikou FLAG.

Implementation of Axis4, funding fisheries related tourism activities.

9. Vessel owner

Fisheries related tourism activities.

In addition ERFC has secured consultation with:

a. Managing Authority of EFF - European Fisheries Fund, Axis 4 Unit
b. FARNET Brussels Head Offices
c. DG Mare, Unit responsible for Greece

- 50% of the respondents have more than 5 boats; 80% of these boats have length less than 12m.
- Most of the respondents, are occupied in coastal fisheries
- Most of the respondent’s average annual production (in tons) amounts to 0-500 t.
- 43% of the respondents have 0-6 employees, 33% have 6-10 employees and 24% of the respondents have more than 11 employees
- 10% of the respondents practice some fisheries related tourism activities but many more than 10% expressed their interest for it. They use mainly angling fishing equipment in fishing tourism. 33% have started with professional fishing.
- Fisheries related activities have seasonal character, from May to November.
- Earnings from fishing tourism (also because of the seasonal character of fishing tourism) are marginal compared to professional fishing.
- In the best of the cases fishermen received 200 tourists a year
• Tourists come from Europe, Russia and Greece. Age of tourists are between 25-70 years old.
• Price of participation in fishing tourism activities is approximately 20-40 euros per person per trip. The duration of this type of touristic fisheries trips is three to ten hours per day.
• The permission of boats performing tourism fishing activities is questionable
• Sea lake and lagoon touristic fishing, accompanied by local traditional gastronomic participatory activities coupled with ecological and educational tours, are most prominent in both Messolonghi/Aetoliko and Amvrakikos areas. Fishermen in both areas expressed their respective strong interest.
• 60 % of respondents thought that the legal framework is an obstacle for fisheries related tourism, 25 % blamed the bureaucracy.
• 20 % of respondents attended training courses related to their professional activities, the rest may form a good target group for ESF and possibly also for EFF Axis 4
• 60 % of respondents prefer to attend to training topics such as “new technologies in fisheries” and “related activities to fisheries”. Only 20 % of them wish to attend to training topics such as “innovation applications” and “marketing procedures”

• Professional Assessment:

<table>
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- 40% of the respondents have not had benefited from European or National Funded Programmes, 20% have had benefited and 40% of them tried unsuccessfully.
- The level of satisfaction with the level of development of fisheries infrastructure is low for 60% of the respondents, and fair for 40% of them.
- 100% of the respondents expressed the need for:
  - state support to fisheries sector,
  - financial support to fisheries sector by state-EU,
  - cooperation with other professionals, for training in innovation technologies and also sustainable tourism development
  - parallel activities with other professional activities
  - combination between Fisheries and Tourism Sector

Some useful conclusions drawn from the consultation meetings with the relevant stakeholders in Greece (see Annex III) are the following:

- The income of fishermen has reduced the last 5 years
- Fishing tourism may contribute to boosting the rebirth of coastal communities and fishermen who are facing financial problems due to a reduction in their incomes and in traditional fishing activities.
- Fishing tourism could be a profitable activity for the fishermen and their families, especially in the lagoons of Amvrakikos (Arta-Preveza) and of Klisova-Mesolonghi and Aitoliko.
• Fishing tourism may serve as a tool for increasing public awareness on the environmental problems and principles of sustainable growth
• The tourists need to taste the fish and to participate in fishing activities
• The fishermen encounter problems with the illegal fishing

Advantages of the fisheries related tourism:
• the economic impact
• reduced fishing effort
• extend the tourist season
• diversification of employment

Disadvantages:
• the problems with the legislative framework
• the poor promotion

Italy
Following the NEMO methodology for stakeholders’ identification and mapping of the state of play of fisheries related tourism in Marche Region, a consultation meeting with relevant stakeholders has been arranged by the Regional Authority. The need of arranging the meeting was also related to the lack of answers to the proposed questionnaires. A total of 100 questionnaires have been submitted to the stakeholders mailing list and n.6 questionnaires have been filled, n.3 have been filled by fishermen already involved in fisheries related tourism. From the questionnaires emerged only few data: the high level of interest in the fisheries related activities at territory level and some figures about the state of play of professional fishing (150 the average number of days dedicated to the professional fisheries, mainly coastal fishing, the number of employees (from 0 to 6), the level of training (professional training). Due to the lack of information derived from the questionnaire submission, the consultation meeting has been arranged to directly involve the stakeholders in the discussion about state of paly and possible
development of fisheries related tourism at regional level. The consultation has been arranged on 11 November 2014 at the regional headquarter in Ancona with a total participation of 14 stakeholders.

After the presentation of NEMO projects objectives and expected results, the Head of Fisheries Unit starts the meeting underlining the state of the art of the Fishing Tourism, highlighting current situation:

- European Maritime and Fisheries Fund (EMFF) for the new programming period 2014-2020 foresees opportunities
- Opportunities will be addresses to enterprises implementing diversification activities

As first step we should analyze why in the past years fishing tourism – despite is considered one of the most relevant diversification activity for fishermen – do not succeed due mainly to some legislative limits and fewer activities grow up.

Also we would like to analyze together rules and laws defined to regulate fishing tourism and icthyotourism activities in other Italian Regions (Tuscany, Emilia Romagna and Apulia Regions) to have a reference at national level and compare different regions situations.

Then the floor is given to the stakeholders, being the main objective of the meeting, a consultation to better define limits that prevents fisheries related tourism development and possible solutions to overcome limits and foster its sustainable development.

Basilio Ciaffardoni (COGEPA) Fishing tourism is basically a very good initiative with potential but is difficult to apply for different reasons:

- We should refer for authorization to different institution and different regulations apply to the fishing tourism sector;
- Fishermen are usually not trained enough;
- One key point to better address is the food provision on the boat which is now really limited and instead is very crucial for the tourist experience, that wants to taste the fresh fish cooked with traditional recipes of our region.
- Rules on products traceability
- Necessity to develop also other kind of fishing tourism as for example with gill nets
- High costs compared to the revenues

Barbara Toce - Mayor of Pedaso Municipality confirms that fisheries related tourism is a deal of great interest during the summer and tourists are really interested to know about fisheries, culture and food linked to it, thus also we should improve the offer and the promotion on our products.

Cecchini (cooperativa Pesca) .. I’ve started since beginning of ’90s with fisheries related tourism activities:

- different regulations make not sustainable the activities
- Is not possible to use private boats (not for professional fishing) for fishing tourism activities
- Fisheries enterprises should use a different boat, not anymore used for fisheries, for these fishing tourism activities to overcome security and safety problems
- Boats for professional fishing have too many security and safety limitations
- Also ichthyotourism activities which are already regulated by law are really difficult to be applied
- lack of cohesion among hotel managers

I used to organize by myself promotion of the fishing tourism activities for example inviting travel blogger to have this experience which was really appreciated.

Harbour Authority underlines that there are some aspects that could be improved but for sure regulations and authorizations about sailing security and safety could not be constricted or decreased, streamlining should be applied in other fields...
Bigoni Federcopesca underlines the relevance of fishing tourism as a diversification activity that should integrate fishermen incomes and at the same time represents an innovative touristic offer that could be an added value for the territory itself. Also ISTAO (Institute for Economic Studies in Ancona) is studying how fishing tourism could be a leverage for territory development.

However there are different kind of limits:

- In the regulations trawling is not allowed for fishing tourism, at the beginning also fishing tourism was seen as another means to reduce fishing effort, which instead should be pursued with other means. This initial misunderstanding has brought also the regulation not in the proper direction since fishing tourism do not entail fishing effort. Tourist is interested to experience and know the real regional fisheries tradition, so we should offer something real and at the same proper boats, so the fact that we have excluded the main Italian fisheries typology this could hamper the development of the sector. Excluding trawling means to limit the possibility to promote our fisheries, we should also better structure and create the offer.

*Cesaretti – Fishermen*

Too much bureaucracy is the most relevant limit for development – limit to 12 people for example, also I had to wait for 3 years to have a proper berth for the fishing tourism activities, thus also we face infrastructure problems. Moreover regulations to provide food should be better addressed; we should not enter in competition with restaurants.

<table>
<thead>
<tr>
<th>STRENGTHS</th>
<th>WEAKNESSES</th>
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<tbody>
<tr>
<td>- Presence of entrepreneurial individual activities</td>
<td>- High price for a fishing tourism tour for 1 day – not sustainable</td>
</tr>
<tr>
<td>- Artisanal Fishery tradition and culture valorization (traditional recipes, habits)</td>
<td>- Old boat not proper for tourists</td>
</tr>
<tr>
<td>- Support of the sector association in the promotion</td>
<td>- Poor offer aggregation</td>
</tr>
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<td></td>
<td>- Lack of training, education and communication capacities with the tourist</td>
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### SWOT Analysis for Fishing Tourism in Adriatic-Ionian Region

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
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<tbody>
<tr>
<td>- Fisheries areas of natural beauty</td>
<td>- Old and low education level fishermen</td>
</tr>
<tr>
<td>- Presence of entrepreneurial individual activities</td>
<td>- Old vessel, not proper for tourists</td>
</tr>
<tr>
<td>- Artisanal Fishery tradition and culture valorization (traditional recipes, habits)</td>
<td>- Lack of training, education and communication capacities with the tourist</td>
</tr>
<tr>
<td>- Support of the sector associations</td>
<td>- Poor marketing and promotion</td>
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<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
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</thead>
<tbody>
<tr>
<td>- Demand, interest from tourists</td>
<td>- Financial crisis</td>
</tr>
<tr>
<td>- Income diversifications for fishermen</td>
<td>- Strict Regulations</td>
</tr>
<tr>
<td>- Local products and territory promotion</td>
<td>- Perceived competition by the local restaurants and other traditional tourism enterprises</td>
</tr>
<tr>
<td>- Involvement of women and young people in the fisheries related activities</td>
<td>- The weather</td>
</tr>
<tr>
<td>- Environmental impact</td>
<td></td>
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<tr>
<td>- European programmes funding</td>
<td></td>
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<tr>
<td>- Sustainable development in Adriatic and Ionian</td>
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Gender issues

Women are liable to constitute a distinct group of stakeholders in most fisheries and women from different social and economic backgrounds may also have distinct and different interests. Special attention needs to the important involvement of women which is not always very obvious and which needs to be specifically investigated.
Picture 5: Fishermen’s Cooperative of Aneza, Arta - Divari of Tsoukalio - GREECE

Picture 6: Fishermen’s Cooperative of Mesolonghi & Aqua Action - Trip in lagoon of Mesolonghi - GREECE
5. Linkages between socio-economic growth and fisheries-related tourism: FLAGs and Good Practices

*In this chapter are presented and analyzed examples by Fisheries Tourism actions. In our effort to capitalise on the previous successful projects, we think that a detailed and specific description of these actions could be useful as a milestone for future interventions for the growth or not of this type of economic activity.*

**FLAGs in partners’ countries**

FLAGs are partnerships between fisheries actors and other local private and public stakeholders to design and implement a bottom-up strategy that fits and addresses their area’s needs to increase economic, social and environmental welfare. In view of the importance and complexity of the issue, the European Commission has established the FARNET Support Unit to assist in the implementation of EFF/Axis 4, act as a networking platform for fisheries areas, and support FLAGs in developing local strategies, initiatives and projects. There are over 300 Fisheries Local Action Groups (FLAGs). These public-private partnerships, set up at local level, work towards the sustainable development of their areas. Each FLAG manages a budget to support a range of projects proposed and carried out by a wide variety of local stakeholders.

**Croatia**

There are no FLAGs foreseen under the current programme in Croatia but there are a number of coastal LAGs and there is strong interest in how this could be developed in the future. European Commission and FARNET Support Unit have planned a joint workshop involving the fisheries and rural development MAs to explore the future development of FLAGs.

**Greece**

The Greek fishing fleet is the largest in Europe in terms of number of vessels but just the fifth largest in terms of engine power and the seventh in terms of tonnage. This is explained by the fact that its 17,353 vessels are primarily small scale coastal fishing vessels of under 12 meters. The main marine species targeted are anchovy, sprat and
cod. The Greek fishing sector has a number of key weaknesses, including the age of its fleet, inadequate training and ageing fishermen and low involvement of producers in the distribution of their products.

Aquaculture production is structured mainly around the production of shellfish, seabream and sea bass. The sector faces several problems including the lack of a marketing strategy, the lack of spatial planning, difficulties related to the transportation of products and pressure resulting from other land uses such as coastal tourism.

There are 310 fish processing companies in Greece. In 2005 processing sector production amounted to around 59 300 tonnes with an approximate value of €294 million. Despite the fact that the sector has shown increase in terms of productivity, this has not yet transferred into an increase in profitability. Efforts are required to develop promotional campaigns and new products as well as the implementation of new technologies and the construction and modernisation of infrastructure. Radical support is also needed to help the marketing sector meet hygiene and modern marketing requirements.

A number of Greece’s coastal areas and islands are dependent on fisheries activities and are currently facing demographic and socioeconomic problems due to shrinking capacity, lack of basic infrastructure, distance from the urban centers, low population density, ageing populations with low adaptability to new technologies and low levels of education. On the other hand the natural resources combined with their attractiveness as tourist destinations offer these areas an opportunity to reverse the negative impacts and achieve sustainable development.

In Greece, €45 million (16.42% of its EFF budget) is currently allocated to Axis 4. The national objective is to use Axis 4 to promote the sustainable development of fisheries areas through the promotion of multiple employment and fostering links with other sectors. With this in mind, the implementation of activities under Axis 4 will pursue the following objectives: increasing the added value of fisheries products; promoting ecotourism; sustaining employment and creating additional jobs;
promoting the coastal environment of fisheries areas and their natural and architectural heritage; improvement of local infrastructure and services so as to improve the attractiveness of fisheries areas; and encouraging the uptake of best practices through the promotion of inter–regional and transnational cooperation.

The areas which applied for Axis 4 funding can be grouped into 2 broad categories: small, remote islands and mainland coastal areas (including lagoons). Regarding the island areas, in addition to issues of isolation, there is also the issue of creating an alternative model for the development of tourism based on new methods and quality - especially given the fact that in many cases it is the only viable alternative for the diversification of activities. Amongst the coastal areas, both underdeveloped areas and areas where there is a high concentration of fisheries activities tended to apply for funding.

Despite the fact that, geographically speaking, the areas did not necessarily have to coincide with national administrative areas or with zones established for the purposes of eligibility under the objectives of Structural Funds the following minimum criteria had to be met to be eligible: at least 0.82% of the economically active population of the area employed in the fisheries sector; the area covered should not exceed 6,000 m2, the population of the area had to be at least 10 000 inhabitants with the exception of the areas comprised solely of small islands, in which case the area was to have at least 5 000 people. In coastal areas of the mainland and large islands, the boundaries of the area could not exceed 10km from the coast or 5km from the banks of a lake.

The FLAGs at EUSAIR Greek regions are South Epirus-Amvrakikou (Etanam) in Preveza-Arta and Aitoliki in Antirrio-Nafpaktos (no 4 and 5 in the following map).

1. AITOLIKI FLAG

The fisheries areas of Aetolia are home to some particularly remarkable sites: the Messolonghi- Aetoliko lagoon complex, which is the largest in Greece and the second largest in the Mediterranean, as well as the estuary systems of Evinos and Acheloos Rivers. The area was also a final resting place of the famous poet Lord Byron, who
was greatly moved by the beauty of the region and travelled there multiple times throughout his life. Aetoliko – Messolonghi lagoon covers 92.30% of the total area’s surface. The areas of Aitoliki and Messolonghi are mainly flat and their coastlines sandy while Nafpaktos is more hilly with a pebble coastline.

The principal economic activities in the area are agriculture, fishing and tourism. In terms of fisheries, this is a very important sector for the region. Most fishing in the area takes place in the Messolonghi-Aitoliko Lagoon and is based on traditional methods. With regards to tourism, this is the activity with most potential for development. Some of the area’s main challenges are to adequately harness the natural and cultural recourses that exist in the area, as well as increasing the value of fisheries products, promoting small scale tourism, and strengthening entrepreneurship.

Population: 32,022
Employment in fisheries: 3.46%
Surface area/km²: 226.88
Coastal or inland: coastal
Population Density/ Inhabitants/ km²: 141.14

Protected areas: Three in total:

Different parts of two municipalities are considered Natura/ Ramsar protected areas, cover 87.6 km² and constitute 38.57% of the total area of intervention. Those areas are located at the Delta of Acheloos River, at Mesolonghi- Aetoliko Lagoon and at the estuaries of Evinos river.

**Main focus of FLAG strategy**

The main objectives of the FLAG’s strategy are:

- The improvement of the local tourism capacities (developing special forms of tourism)
- Strengthening and promoting the exploitation and diversification of fisheries products in order to boost fishermen’s income.

- Promoting the local environmental and cultural assets.

- Supporting entrepreneurship.

- The exploitation of new technologies and the application of quality standards.

- Enhancing know-how transfer and cooperation at regional and interregional level

**Project examples and ideas**

- In terms of tourism: Setting up accommodation units, restaurants and alternative activities and services.

- Establishing small industry units for fisheries products.

- Building recreational and bird-watching parks.

- Creation of a museum about traditional fishing techniques.

**Partnership**

Lead partner or Responsible Legal Entity: Aitoliki Development Enterprise S.A.

Other key actors/organisations in the partnership: Local Union of Municipalities and Communities of the Provincial Administration of Aitoliaakarnania, Municipalities of Messolonghi and Nafpaktia, Region of Western Greece Managing Authority of the Messolonghi–Aetoliko Lagoon, Technical Chamber of Greece, Regional Department of the Provincial Administration of Aitoliaakarnania, Fishermen’s Associations of Aetoliko “DOLMAS” and “MESSOLONGHI”, Federation of Fishermen’s Associations of Western Greece, Commercial Association of Nafpaktos “HERMES” and Young’s Association of Messolonghi.

Links with LEADER: Aitoliki FLAG is also a LAG for Leader 2007-2013. Aitoliki SA has

**Funding**
Total public funding 2007-2013: € 4 610 000

EFF: € 3 457 500

Other public (national/ regional/ provincial): € 1 152 500

Private: € 1 947 000

2. SOUTH EPIRUS-AMVRAIKIKOU FLAG

The FLAG area covers the whole region of the Amvrakikos gulf, made up of the municipalities of Preveza, Arta, Amfilochia and Aktio-Bonitsa. The area is well known for its environmental richness. It is characterised by the presence of karstic spring lakes, relic riparian forests, wet meadows and freshwater marshes. The area is designated as a RAMSAR and NATURA 2000 site and lies within the limits of the National Park of the Amvrakikos Gulf Wetlands. Numerous bird, mammal, fish and vertebrate species live in the area. Besides fisheries, the main economic activities are agriculture and food industries such as dairy.

The main challenge faced is to make the protection of the Amvrakikos area’s significant ecosystem compatible with the development of the local economy by promoting the special symbiotic character of traditional fishing activities and the environmental values of the territory.

Population: 52 035 Employment in fisheries: 2.58%

Surface area/km²: 983.814 km² Coastal or inland: coastal

Population Density/ Inhabitants/ km²: 52.89 Protected areas: One National Park, 12 Ramsar sites, five Natura 2000 areas

Main focus of FLAG strategy

- Diversifying and improving the competitiveness of the local economy.

- Increasing the added value and quality of local fish production.

- Promoting the area as an important ecotourism and fish tourism destination.

- Preserving and improving the environment.
Project examples and ideas

- Setting-up and supporting traditional food production companies.
- Setting-up and supporting scuba diving, sailing, surfing activities.
- Encouraging ecotourism and fish tourism amenities.

Partnership

Lead partner or Responsible Legal Entity: ET.AN.AM. S.A. L.G.O Development Agency for South Epirus and Amvrakikos SA LGO.

Other key actors/organisations in the partnership: Regional Units of Arta, Aitoloakarnias and Prevezas, Unions of Agricultural Cooperatives of Prevezas and Arta, Municipalities of Arta, Preveza, Ziros and Aktio-Vonitsas and the Chamber of Commerce of Artas.

Links with LEADER: Etanam, S.A. also manages the Leader programme (2007-2013) in the wider zone of Preveza and Arta. The two programmes i.e. Leader and Axis 4 of the EFF complement each other. ETANAM SA has acted in the past years as a Local Action Group for Leader I, II and Leader +. Inside of the FLAG there is a special committee in charge of approving Axis 4 projects.

Funding

Total public funding 2007-2013: € 4 860 000

EFF: € 3 645 000

Other public (national/ regional/ provincial): € 1 215 000

Private: € 1 713 000
Figure 5: FLAGs in Greece

Italy

The selection of Fisheries Local Action Groups is carried out at the Regional level in Italy and financial resources are managed and allocated by the Regions.

Marche Regional Authorities play the role of Intermediate Body for the implementation of some of the EFP Operational Programme at Italian level –OP 2007-2013 – reg.1198/2006. The FLAGs establishment is related to the measure 4 Axis 1 of the European Fisheries Fund and regulated in the Regional Council Decision n. 934 of 07/06/2010 defining the criteria for the FLAGs setting up and for the Local Development Plans. FLAG can be considered a best practice of public-private
partnership in programming and using the resources for the coastal sector development.

The FLAG’s strategy is basically geared towards mobilizing the fisheries sector to make the territory more competitive, in particular by promoting better organization of the small scale fisheries sector so as to allow them to diversify into complementary activities such as Fishing Tourism, supporting small-scale processing of local fisheries products and taking advantage of opportunities for direct sales fishermen.

FLAGS at EUSAIR Italian Regions are 1 in Friuli Venezia-Giulia, 2 in Veneto, 2 in Emilia –Romagna, 2 in Marche, 2 in Abruzzo, 2 in Puglia, 6 in Calabria, 11 in Sicilia.

FLAGS IN MARCHE REGION

1. FLAG MARCHE NORD

The Marche Nord FLAG covers the municipalities of Fano, Senigallia, and Mondolfo, a territory that could be seen as one large coastal city, with poorly planned urbanization along its rivers: the Metauro, Cesano and Misa. The area is characterized by good social-economic conditions, although employment in fisheries has been decreasing over the past years.

Population: 120,025  Employment in fisheries: 571

Surface area/km²: 260 km²  Coastal or inland: Coastal

Population Density/Inhabitants/km²: 462  Protected areas: No

The overall objective of the Marche Nord FLAG’s strategy is the development of fisheries as an integral part of the local resource pool, along with the development of an economy geared towards quality, local culture, and the growth of sustainable tourism. More specifically, the strategies focus on:

- strengthening fishing-tourism activities;
- supporting fish trade and creating linkages between local fisheries and agriculture products;
- creating efficient services to support innovation for fisheries and aquaculture activities

**Project examples and ideas**

- Working on plans to define a territorial label, linked to the “QM” (Quality Mark) developed by the Marche Region
- Joint promotion of the cultural and touristic accommodation offer
- Experimental agreements to introduce fisheries products into school canteens

**Partnership**

Lead partner or Responsible Legal Entity: G.A.C. Marche Nord Association

Other key actors/organisations in the partnership: The 3 municipalities of the eligible territory, 2 Provinces (nuts III local public body), 2 Chambers of commerce, 2 fisheries associations as well as fisheries producer associations.

Links with LEADER: The FLAG will be managed by a collaboration of the three LAGs present in the area.

**Funding**

Total public budget of FLAG 2007-2013: €877 845.91
EFF: €438 923 (50%)
National & regional co-financing: €438 923 (national: 40%), regional (10%)
Private: €475 000

**2. FLAG MARCHE SUD**

The FLAG is located in the Southern part of the Marche region, in eastern Italy. It covers the municipalities of San Benedetto del Tronto, Grottammare, Pedaso, Porto
San Giorgio, Civitanova Marche and Porto Recanati. The area’s main fishing ports are located in San Benedetto del Tronto, Porto San Giorgio and Civitanova Marche while Grottammare and Porto Recanati have landing sites. While the FLAG territory only accounts for 9% of all companies present in the region, 38% of Marche’s fishing companies are located in the FLAG area. Equally, the FLAG area accounts for 41% of the regional fisheries workforce, while the territory only represents 6% of overall regional employment. These figures highlight the high degree of concentration of the region’s fishing activities in the FLAG territory. And yet, the area saw a reduction in over 10% of its fleet between 2000 and 2006. Significant challenges that the FLAG aims to tackle are raising employment rates and integrating the fisheries sector with other economic activities present in the territory.

Population: 135 413  Employment in fisheries: 719  
Surface area/km²: 118  Coastal or inland: Coastal  
Population Density/ Inhabitants/ km²: 1 115  Protected areas: 1 (Sentina Natural Regional Reserve)  
The FLAG’s strategy focuses on two key areas:  

1. Socio-economic and environmental sustainability: "defensive measures" to preserve and enhance local assets and excellence in the long term, developing tools to overcome the weaknesses of the territory and mitigate against the impact of threats. The socio-environmental sustainability strategy is divided according to resources: fish, human, and environmental.  

2. Territorial Identity: "proactive measures" to promote the strengths and opportunities of the area through an integrated strategy for local development focused on the area’s identity and other unifying elements. The municipalities that make up the territory of the FLAG share a number of commonalities (typical fish, marine culture, folklore, crafts, environment, etc.) which can be used to activate virtuous policies of sustainable development in the territory. This part of our strategy is divided into: typical fisheries products of the area; coastal and marine environment; and culture, tradition, folklore and crafts.
Project examples and ideas

- Developing the identity and recognition of local seasonal fisheries products.

- Improving local marine fisheries products in synergy with the environmental, gastronomic and cultural excellence of the area and other local and regional chains.

- Encouraging and promoting generational change in the fisheries sector and capitalizing on the local marine know-how.

- Developing the environmental and economic sustainability of the area’s fisheries activities by using innovative technologies.

- Adding value to marine and coastal environmental resources through environmental certification schemes and by promoting environmental awareness and outlets where local fish can be eaten.

Partnership

Lead Partner or Responsible Legal Entity: Municipality of San Benedetto del Tronto

Funding

Total public budget 2007-2013: €1 084 112

EFF: € 542 056 (50%)

National & regional co-financing: € 542 056 (national: 40%), regional (10%)

Other public: € 35 000
Figure 6: FLAGs in Italy
Good Practices

At this point it is appropriate to describe some good practices examples from FLAGs and not only. The selection of the good practices was done by using the following criteria:

a. The good practice example connects to pesca-tourism, accommodation & restaurants;
b. The good practice example offers successful and innovative approaches that exploit the best the opportunities offered by the economic area of the participant country;
c. The good practice example could be easily transferred to other areas/countries/regions.

Selected good practices from FARNET16

1. Pescatourisme 83 - FLAG Groupe Varois – Le Var, FRANCE

About the project: This project transfers and adapts pesca-tourism experience gained in Italy to the context of the Var, France. Not only has it created a specific touristic activity that is in line with the type of fishing in the area but it has also involved the right actors to encourage the legislative evolution necessary to facilitate this activity around the French coast.

Pescatourisme 83 aimed to offer local fishermen a way of diversifying their revenues without increasing their fishing effort while at the same time engaging with the general public in a way that raises awareness of the tradition and heritage that fishing represents and the issues the sector faces.

Pesca-tourism is understood to involve professional fishermen welcoming a certain number of tourists on to their boats in a tourism-recreation activity to discover the

16 See https://webgate.ec.europa.eu/fpfis/cms/farnet/project-examples-diversification
world of fishing and the sea. In the context of the Var, the practice has been adapted to the type of fishing boats (7-10 metres and often with just one crew member) and consists of a morning (3-4 hours) of pescatourism, leaving before dawn to pull in the nets laid the day before and observe and learn the techniques of artisanal fishing in the area.

**Transferability:** Pesca-tourism is among the first ideas that spring to mind when exploring avenues for fishermen to diversify their activities and the methodology of Pescatourisme 83 has strong potential to be transferred to other areas. And yet, it must be mentioned that it is also a practice with a finite potential to compensate for many of the difficulties in the fishing sector and is not necessarily suitable for all areas. For successful transfer to different areas, the project promoter insists on the importance of the following:

- clear definition of the context and needs of the area and the target audience
- finding the right partners to address these needs – and real participation of these partners
- development of a methodology that is adapted to the needs and objectives established

Pescatourisme 83 has already attracted interest from four other French FLAGs which have started work to set up similar programmes in their areas.

2. À l’Ostendaise Menu - FLAG West Flanders - BE

**About the project:** À l’Ostendaise, brings together local fishermen and restaurants to create and promote a new market for local fish, turning them into quality dishes in Ostend’s top restaurants.

The project includes a series of activities and promotional campaigns to celebrate and promote fish and seafood caught by Ostend’s fleet. A two-day launch event was organised on the town’s redeveloped seafront in which 25 selected restaurants were invited to have a stand and take on the challenge of proposing fish dishes based on local seasonal fish. This was followed by
the integration of the “à l’Ostendaise” menu into the regular offer of participating restaurants who must undertake to propose a menu based on the two species of local fish designated for that month. Moreover, the restaurants take turns to host two monthly dinners where the first 10 people to book can enjoy the “à l’Ostendaise” menu in the company of a local fisherman who shares his knowledge and stories about the different local species and techniques used to fish them. The dinner also includes a guided tour of the port area and often a presentation of the menu by the chef.

**Transferability**: This is an excellent example of promoting an area’s local fisheries activities and products while attracting both locals and tourists to restaurants that prize sustainability. Similar activities could be envisaged for many fishing communities where local fish struggles to compete with cheaper or better known fish species.

**Final Comment**: Work continues on traceability along the fish chain and capacity building for fishermen. Systems for checking that participating restaurants comply with the rules on recommended fish species are in place. However, given that all fish in Belgium must be sold through the auction, work is now underway with wholesales to encourage them to pass on more information (e.g. which boat fish comes from) to clients such as restaurants. At the request of participating fishermen, training is also envisaged to develop presentation skills that will give them confidence in addressing groups to explain their work and products.
3. Benboa: restaurant, bar & delicatessen - FLAG Ría de Arousa - ES

About the project: Creating 17 jobs, Benboa is a project that has breathed new life into a small fishing village by reviving and diversifying the activities of a local shellfish supplier. Benboa offers visitors the experience of seeing live shellfish, while having the opportunity to buy, prepare and taste seafood, all in one place.

Three young entrepreneurs, Paco, Ruben and Carlos, recently returned to their hometown, Corrubedo, a small fishing village in Galicia of 700 inhabitants. Few economic activities remain in the village and fishermen these days land their catch in the neighbouring town of Ribeira. And yet, 300,000 visitors pass through every year, attracted largely by the sand dunes and lagoons that have contributed to Corrubedo’s protected status. The three friends grasped this opportunity to make a change by harnessing local seafood cuisine, education and tourism.

The project itself involved renovating an old salting factory and transforming it into a multi-purpose space, Benboa. It was built around existing live shellfish supply activities and the expansion into Benboa saw the development of a seafood restaurant, bar, fishmonger, processing unit and gourmet shop selling artisanal Galician products and ready-made meals from the processing unit. As such, Benboa makes up for many of the services lacking in the village. It also offers cookery workshops, wine tasting, lectures, maritime culture exhibitions, as well as concerts and performances – all with the purpose of promoting the consumption of Galician fisheries products. The space has been decorated with touches of local maritime tradition: nautical lamps, decorative boat rope, toilets in the style of a ship’s cabin, shelves made from recovered tuna cages and tables made from wooden rafts.

Transferability: This sort of project could be transferable to other areas with nearby populations and strong tourism potential that is underexploited. The significant investment necessary to renovate and equip premises for such operations does,
however, imply that FLAGs would need substantial budgets to support this ambitious type of project.

**Final Comment:** Benboa illustrates a creative way of revitalizing an area with little economic activity, combining innovation with the promotion of the local marine tradition, and the development of leisure and culinary experiences with the creation of local jobs.

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### 4. Hotel “A de Lolo” - FLAG Costa da Morte – ES

**About the project:** To diversify her family’s economic activity, Maria Luz, a retired fisherman's wife opened a very distinctive hotel and restaurant with a local maritime theme in the village of Muxia, a highly attractive touristic point where demand for accommodation was going unmet. This created five full-time and four part-time jobs.

Home to the Romanesque marine church, the Virgen of the Boat, the small fishing village of Muxia is one of the final destinations of pilgrims following the Way of St. James to Santiago de Compostela. The legend of the Virgen arriving at this spot in a stone boat to encourage St James in his preaching accounts for the village’s huge popularity and year-round flow of tourists. Accommodation to house so many tourists, however, was going unmet and when Maria Luz, a retired fisherman’s wife, inherited an old stone house, the idea to transform it into a hotel was an obvious choice.

The project itself involved the reconstruction and renovation of an old traditional stone house and the development of an 8 bedroom boutique hotel and a restaurant with capacity for 55 people. Targeting an educated and cultivated public, including artists and writers, the family paid particular attention to quality and design. The decoration, for example, illustrates the rich marine history of the village through fish
hook lamps, crab-shaped bedside tables and handmade pebble maps of nearby underwater areas in all bedrooms.

The restaurant and its kitchen are run by Maria Luz, while her husband is in charge of buying seafood and fish and fileting it ready for the chef. 100% of fish served is local and fresh while the menus offered are adapted to give visitors the option of tasting a range of traditional dishes e.g. the Pilgrim menu (printed in English, French and Italian as well as Galician and Spanish) which is available in different combinations from €9.50 to €15.

The restaurant also boasts its own cooking laboratory where Maria Luz invites catering professionals to develop new fish recipes. Cooking workshops are offered on demand and the cooking laboratory is opened to all guests and customers ready to prepare their own meal or eager to discover new ways of preparing Galician fish. Wine tasting, cultural marine exhibitions and book presentations are also held in the restaurant on a regular basis.

**Transferability:** This project offers ideas to FLAGs operating in areas where demand for tourist accommodation goes unmet and where the FLAG has sufficient budget to support infrastructure projects. Although the investment in this case was significant, the example can also serve as inspiration for those fishermen’s wives who have spare rooms that they can convert into accommodation for tourists on a smaller scale.

**Final Comment:** The results obtained so far have inspired the family to consider new ideas such as developing an internal TV channel for the rooms, screening the cooking workshops performed in A de Lolo, and creating their own line of souvenirs.
Other good practices

1. Jadran III (trawler) - CROATIA

Owner: Mr Joško Pedišić (professional fisherman, owner of the authorized licenses for commercial fishing-trawler, and holder of license for fishing tourism)

The project was implemented in cooperation with UNDP within the COAST project.

Project goal:

- Reducing fishing effort
- Cleaning the Adriatic seabed
- Demonstration of the fishing tourism

Plan of the trip:

9:00 Departure port
10:00 Start of fishing
12:00 Pulling the trawl
13:30 Entry to the anchorage
17:00 Return to the port

Advantages of fishing tourism in comparison to commercial fishing:

- reduced fishing effort-fishing effort in tourist trawling lasts 1,5 ours and in classical trawling 15 ours, the ratio is 1:9
- lower fuel consumption-the ratio is 3 (tourist trawling):7 (commercial trawling)
- the net profit per day- the ratio is 8:2 in favor of the tourist trawling
- satisfaction of fishermen
2. Port museum of Tricase – ITALY (Magna Grecia Mare project)

Magna Greece – Promotion and enhancement of the common maritime culture (promotion and valorisation of the common maritime culture) is a project financed by the funds of the European Territorial Cooperation Programme Greece-Italy 2007-2013.

Small fishing communities and small villages are a huge container of knowledge, integrated with the hinterland by promoting for a qualified and sustainable tourism and for development. In this context the idea of Port Museum was developed. Port museums are “eco-museums”, “places and paths” that tell the story and the life of the sea, on the sea and with the sea. They are “ports, harbours and small villages”, living witnesses and protagonists of a centuries-old culture of ancient seafaring traditions, fascinating cultural contaminations of landings and boardings, of arrivals and departures. They are spaces “alive” and “lived” by seafarers, fishermen and people of any profession, inhabitants and visitors; where history, culture, environment, boats, objects, landscapes, rituals, stories, memories and dreams create a “port” and add colors, sounds and smells. They are sea and land places “rich” of customs, traditions, values, beliefs, symbols and myths. They are “workshops” and daily working places, outdoors and indoors, proud heirs of an
ancient culture. They are a “community” that takes awareness of its value and that exhibit its self but with discretion.

The port museum of Tricase is located in the heart of the Salento peninsula, one of the typical destinations in the most popular touristic sea routes in Puglia (Apulia), where “sea” means beaches, fun, sun and sand.
6. Conclusions - Recommendations

In this last concluding chapter the previous facts, evidences and data are summarized, in order to identify the current situation, to suggest solutions and propositions and to explore potentialities related to the fisheries tourism sector and activities for every analyzed region and also to the whole Ionian-Adriatic Macro Region.

The objective of this socio-economic analysis is to provide further evidence of the social and economic profiles of maritime communities and fishermen from key fisheries dependent regions of Adriatic and Ionian macro-region, taking into account that these data could be helpful in identifying gaps and obstacles and providing its future scenario in Adriatic-Ionian basin.

Despite the lack of comparative data from all the sectors related to socio-economic impacts of fishing tourism in the EUSAIR level countries, specifically to Croatia, Greece and Italy, the results from this analysis could be useful as a basis for the preparation of an action plan and policymaking for the Adriatic and Ionian macro-region.

According to Kauppila and Karjalainen (2012) fishing tourism generates an income injection from outside the area and thus stimulates the regional economy and regional development. Because the fishing tourism industry is, like the tourism industry in general, an amalgam of different industries – accommodation, catering services, service stations, retail trade, programme services, etc.– the income and employment effects of the industry extend widely over the economic life of regions and communities.

**Diversification of fisheries into tourism** may launch complementary activities to the fishing activities, such as hospitality services, fishing tours, development of new infrastructure and services, activities related to the sea and coastal areas. It should be noted that the benefit for fishery maximizes in the case when is possible to combine more services such as trips with professional boats along the coast, attendance and participation in the fishing activities, presentation of the most typical
and traditional fishing methods and tools, providing meals on board or ashore demonstration of the preparation method of traditional recipes with fish and seafood, providing information on the important marine resources of the region and the marine environment etc.

According to our findings there is a high potential for fisheries related tourism, which can contribute to development of rural areas by providing employment and by contributing to the preservation of traditional, cultural, ecological and ethnological values. Crews of the fishing boats and fishing family must be properly trained and informed, so that they could be able to respond to all inquiries especially about environment protection, safety, hygiene, fishing, communication and tour.

Fishermen who will be occupied in fisheries related tourism need training in order to develop skills and knowledge in training topics as “new technologies in fisheries” and “related activities to fisheries”. Because of poor promotion of this type tourist service, designing and creating a communication network between fishermen, tourist agents and visitors are crucial. Fishing localities can launch joint marketing campaigns with other destinations in the region- collaboration can yield mutual benefits. There is a strong need for state and EU support to fisheries sector, particularly for modification of vessels for tourism, training and marketing activities.

The diversification of fishermen’s employment is one of the main goals of EEF Axis 4 supported by FARNET and all the maritime. Blue Growth policies should include it in their plans. The Adriatic and the Ionian region is a tourism destination that still requires a considerable amount of work in order to be fully recognized, given that the European Union is paying particular attention to this area.

Some key points emerging from our analysis are the following:

- The role of women into fishing tourism activities could be crucial. Their contribution to the enrichment of the tourist product is ranging from the culinary gastronomic activities, to the preparation of complementary food
products (apart from fish food) and handicrafts to serve as presents or souvenirs for the tourists, to the organisation of local cultural events.

- **Youth** can also be considered as a target group in developing fish tourism destinations. Younger generation is best placed in the language learning potential, can enrich fishing tourism with the appraisal of Sport Events and other youth preferred cultural activities.

- **Elderly** can also find their role in the elaboration of the fishing tourism offer. Either by attracting elderly active tourists or by contributing with their experience in the preparation for hosting or hosting the visitors

- **Tourist agents** are often not aware of the fishing tourism potential. Respective awareness should be secured and fishing tourism should become part of the itineraries offered.

- **Social Media** and **targeted marketing** should be employed to promote fishing tourism possibilities.

- **Fishing villages** could operate as an **open living Museum**. Best practices for such holistic approach should be disseminated and integrated into the local realities, provided that funding for such transformations has been secured by EFF Axis 4.

- **Networking** between **fishing tourism** -or potential fishing tourism- **destinations** should be encouraged possibly at cross country level so far as the target tourists would wish to visit next recommended destinations next time they will be travelling for leisure.
References


EC (2012). *Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions: A Maritime Strategy for the Adriatic and Ionian Seas*.


ANNEX I: Glossary of terms
Aquaculture
Breeding and rearing fish, shellfish, etc., or growing plants for food in special ponds.

Axis 4
Axis 4 of the European Fisheries Fund is a tool for fisheries communities to drive development locally. It is implemented by private public partnerships called Fisheries Local Action Groups (FLAGs).

Blue Growth
Blue Growth is the long term strategy to support sustainable growth in the marine and maritime sectors as a whole. Seas and oceans are drivers for the European economy and have great potential for innovation and growth. It is the maritime contribution to achieving the goals of the Europe 2020 strategy for smart, sustainable and inclusive growth.

European Fisheries Fund (EFF)
The European fisheries fund (EFF) provides funding to the fishing industry and coastal communities to help them adapt to changing conditions in the sector and become economically resilient and ecologically sustainable. For the period 2014-2020 it is called European Maritime and Fisheries Fund (EMFF).

EUSAIR
The EU Strategy for the Adriatic and Ionian Region (EUSAIR) is a macro-regional strategy adopted by the European Commission and endorsed by the European Council in 2014. The Strategy was jointly developed by the Commission, together with the Adriatic-Ionian Region countries and stakeholders, in order to address common challenges together. The Strategy aims at creating synergies and fostering coordination among all territories in the Adriatic-Ionian Region.

FARNET
The European Fisheries Areas Network (FARNET) brings together all fisheries areas supported by priority Axis 4 of the European Fisheries Fund (EFF). Through information exchange and a dedicated support unit, this network aims to assist the different stakeholders involved in the sustainable development of fisheries areas at local, regional, national and European level.

Fisheries Local Action Groups (FLAGs)
FLAGs are partnerships between fisheries actors and other local private and public stakeholders. Together, they design and implement a bottom-up strategy that fits and addresses their area’s needs to increase economic, social and environmental welfare.

Fishing tourism
Fishing Tourism can be defined as a set of tourism-related activities carried out by professional fishermen in order to differentiate their incomes, promote and valorize their profession and socio-cultural heritage, and enhance a sustainable use of marine ecosystems, by means of boarding non-crew individuals on fishing vessels. Although the “tourism and recreational purpose” of fishing tourism activities is apparent, this is not always formally stated by the relevant legislation, as it will be discussed in the regulatory framework section

Ichthytourism
Ichthytourism includes recreational, gastronomic and hospitality initiatives like fishing tourism. One of the main differences between fishing tourism and ichthytourism is that ichthytourism activities cannot be carried out on board fishing vessels.

Pesca-tourism
Pesca-tourism is understood to involve professional fishermen welcoming a certain number of tourists on to their boats in a tourism-recreation activity to discover the world of fishing.

Tourism fishing
The main difference between tourism fishing and fishing tourism is the importance of fishing as a motive for the journey. The former sees fishing as just one motive among others for destination selection, whereas the latter emphasises the importance of fishing as the main motive for the journey.
ANNEX II: Questionnaires
NEMO PROJECT

ANNEX II – STAKEHOLDERS SURVEY

Fisheries

Index
SURVEY BACKGROUND 1
PRIVACY STATEMENT 1
GENERAL SECTION 2
SOCIO-ECONOMIS QUESTIONNAIRE (FISHERIES SECTOR) 4

SURVEY BACKGROUND:

The questionnaire is part of NEMO project activities of stakeholders analyses. NEMO is an European project co-financed by the MED programme with the aim of providing useful information and data on the state of play and the possible development of fisheries related tourism in Adriatic Area. Marine and coastal tourism are, in fact, one of the fastest growing areas within the world's largest industry. Fisheries related tourism plays an important role for sustainable socio-economic development of coastal communities and, if properly addressed, contributes to the sustainable management of marine resources. Starting from relevance of Adriatic/Ionian Sea basin Strategy for the cohesion of the whole Mediterranean basin NEMO intends to play its full part in shaping ecological and socio-economic transnational and holistic approach to develop an overview about Fisheries related tourism in Adriatic/Ionian Regions which contributes to the MED overall integrated maritime policy. The questionnaire is divided in three main section corresponding to the levels of the analyses foreseen by the project:
1. Institutional
2. Environmental
3. Socio-economic

PRIVACY STATEMENT:

Thank you for participating in NEMO project survey. The information you provide will enable us to collect institutional, scientific and socio-economic data and information related to state of play and future scenario of fisheries related tourism.

NEMO will not be able to personally identify you by the information you provide in your responses to this survey, unless you choose to provide your details and request us to contact you. We will not disclose your personal information to third parties without your consent, except in response to legal requirements

GENERAL SECTION:

Organisation name/Name

Address:

Contact information

Telephone number: _______________ Fax. Number: _______________

E-mail address: _______________ Website: _______________

Age: ☐ 18-30 ☐ 30-45 ☐ 45–60 ☐ 60-up ☐

Gender: Male ☐ Female ☐

Educational Level

Basic Education ☐
1. How do you categorise yourself / your organisation as a stakeholder?

Geographic scope of operation:

<table>
<thead>
<tr>
<th>International</th>
<th>Regional</th>
<th>National</th>
<th>Local/Community</th>
</tr>
</thead>
</table>

Sector:

Enter the categories of stakeholders selected from the lists

2. What is your primary type of activity?

- Legislative/institutional
- Advisory
- Fishery Association
- Marketing
- Conservation
- Other (specify):

- Research
- Subsistence fisher
- Fish Processing
- Funding/lending agency
- Government fishery manager

- Supply of goods
- Sport Fisher
- Food health
- Tourism

3a. Are you / is your organisation a member of any national/regional committees or multi-stakeholder groups relevant to the fishery?

Yes ☐  No ☐

3b. If your answer to 3a is yes, please specify the name of the committee(s) or multistakeholder group(s) and its/their main focus/interest/activity below:

_____________________________________________________________________

_____________________________________________________________________

______________________  ____________________________________________

_____________________________________________________________________

______________________  ____________________________________________
SECTION III: SOCIO-ECONOMIC QUESTIONNAIRE

FISHERY SECTOR

1. Are you professional occupied in fisheries sector?
   - Yes
   - No
   - I have also another profession ______________

2. How many boats do you have?
   - 1
   - 2-5
   - up to 5
   - No boat

3. How many meters is your boat?
   - <12m.
   - >12m.

4. Your occupation in fisheries belongs to (types of Fisheries)
   - Coastal Fisheries
   - Middle Size Fisheries
   - Distant water fisheries
   - Other, please specify

5. Average annual production (in tons)?
   - 0-500t.
   - 501t.-1000t.
   - 1001t.-up

6. How many employees do you have?
   - 0-6
   - 6-10
   - 11-15
   - 15-up

7. Are you interested in fisheries related to tourism activities?
   - Level of Interest
8. Did you practice fisheries related tourism activities?

YES
NO

If yes, please reply to the following questions:

9. When did you start with professional fishing, and when with touristic fishing?

_____________________________________________________________

10. What kind of fishing gears do you use in professional fishing, and what kind of fishing gears in touristic fishing?

________________________________________________________________________
________________________________________________________________________

11. How many working days did you spend in professional fishing and how many in touristic fishing in the last 3 years (2011 – 2012 – 2013)?

<table>
<thead>
<tr>
<th></th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
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<tbody>
<tr>
<td>Professional</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>fishing working</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>days</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Touristic</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>fishing Working</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>days</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

12. In which part of the year do you work in professional fishing, and in which part of the year in touristic fishing?

________________________________________________________________________

13. What is your average daily catch in professional fishing (kg), and what in touristic fishing?

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
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<tbody>
<tr>
<td>Professional</td>
<td></td>
</tr>
<tr>
<td>fishing daily</td>
<td></td>
</tr>
<tr>
<td>catch (kg)</td>
<td></td>
</tr>
<tr>
<td>Touristic</td>
<td></td>
</tr>
<tr>
<td>fishing daily</td>
<td></td>
</tr>
<tr>
<td>catch (kg)</td>
<td></td>
</tr>
</tbody>
</table>
14. Your annual earnings percentage of professional fishing and tourist fishing?

<table>
<thead>
<tr>
<th>Professional fishing earnings percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Touristic fishing earnings percentage</td>
</tr>
</tbody>
</table>

15. What additional services did you provide to tourists on board during the tourist fishing:

<table>
<thead>
<tr>
<th>beverages</th>
<th>already prepared food</th>
<th>preparation of fish caught</th>
<th>sleeping aboard</th>
<th>swimming in the sea</th>
<th>education</th>
<th>Other</th>
</tr>
</thead>
</table>

16. What kind of additional services do you offer to tourists - fishermen on the shore:

<table>
<thead>
<tr>
<th>multi-day accommodation</th>
<th>food</th>
<th>beverages</th>
<th>Other</th>
</tr>
</thead>
</table>

17. Average number of tourists who daily board the ship?

______________________________

18. The total number of tourists in the last years who participated in fishing?

<table>
<thead>
<tr>
<th></th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>N. Tourists</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

19. National structure of tourists? Where they come from?

1. ____________________
2. ____________________
3. ____________________
4. ____________________
5. ____________________

20. Age structure of tourists?

__________________________________________________________________
21. Price of participation in recreation fishing per person per trip?

______________________________

22. Daily duration of touristic fishing (hours)?

___________________________________________

23. Which kind of obstacles do you face in the development of fisheries related tourism

<table>
<thead>
<tr>
<th>Bureaucracy</th>
<th>Legitimacy Affairs</th>
<th>Financial Liquidity</th>
<th>Other</th>
</tr>
</thead>
</table>

24. Have you ever attended training courses related to your profession activities?

Yes ☐
No ☐
I am not interested ☐

25. Which training topics do you prefer to attend related to fisheries industry?

<table>
<thead>
<tr>
<th>Innovation Applications</th>
<th>New Technologies in Fisheries</th>
<th>Related Activities to Fisheries</th>
<th>Marketing Procedures</th>
<th>Finance Administration</th>
<th>Infrastructure and Facilities</th>
<th>Other</th>
</tr>
</thead>
</table>

26. Professional Assessment:

<table>
<thead>
<tr>
<th></th>
<th>Disagree</th>
<th>Fair</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>You are satisfied by your profession activities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do you believe that your profession activity has future as being now</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do you wish the co-operation with other professionals</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>You have cooperation with other professionals</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>You get regular information on topics of your sector</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Do you consider that the state supports your sector of activities

Do you prefer to have related activities

A parallel activity with tourism will help your sector

27. Have you ever benefited from European or National Funded Programmes?
   Yes ☐
   No ☐
   Tried Unsuccessfully ☐

28. Are you satisfied by the facilities and infrastructure related to your sector?
   Level of Satisfaction

29. Needs Assessment:

<table>
<thead>
<tr>
<th>Need for state support to my sector</th>
<th>Disagree</th>
<th>Fair</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Need for financial support to fisheries sector by state-EU</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Need for cooperation with other professionals</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Parallel activities with other professional activities</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Need for combination with Fisheries sector with Tourism Sector</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Need for training in innovation technologies</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

For the verification of the research process please notify your name or a valid e-mail address___________________________
SURVEY BACKGROUND:

The questionnaire is part of NEMO project activities of stakeholders analyses. NEMO is an European project co-financed by the MED programme with the aim of providing useful information and data on the state of play and the possible development of fisheries related tourism in Adriatic Area. Marine and coastal tourism are, in fact, one of the fastest growing areas within the world's largest industry. Fisheries related tourism plays an important role for sustainable socio-economic development of coastal communities and, if properly addressed, contributes to the sustainable management of marine resources. Starting from relevance of Adriatic/Ionian Sea basin Strategy for the cohesion of the whole Mediterranean basin. NEMO intends to play its full part in shaping ecological and socio-economic transnational and holistic approach to develop an overview about Fisheries related tourism in Adriatic/Ionian Regions which contributes to the MED overall integrated maritime policy. The questionnaire is divided in three main section corresponding to the levels of the analyses foreseen by the project:

4. Institutional
5. Environmental
6. Socio-economic

**PRIVACY STATEMENT:**

Thank you for participating in NEMO project survey. The information you provide will enable us to collect institutional, scientific and socio-economic data and information related to state of play and future scenario of fisheries related tourism.

NEMO will not be able to personally identify you by the information you provide in your responses to this survey, unless you choose to provide your details and request us to contact you. We will not disclose your personal information to third parties without your consent, except in response to legal requirements.

**GENERAL SECTION:**

Organisation name/Name
__________________________________________________________

Address:
________________________________________________________________________
________________________________________________________________________

Contact information

Telephone number: _________________       Fax. Number: _________________
E-mail address: _________________       Website: _________________

Age:       Gender:

18-30☐ Male ☐
30-45 ☐ Female ☐
45–60 ☐
60-up ☐

Educational Level

Basic Education ☐
2. How do you categorise yourself / your organisation as a stakeholder?

Geographic scope of operation:

<table>
<thead>
<tr>
<th>International</th>
<th>Regional</th>
<th>National</th>
<th>Local/Community</th>
</tr>
</thead>
</table>

Sector:

*Enter the categories of stakeholders selected from the lists*

2. What is your primary type of activity?

- Legislative/institutional ☐
- Research ☐
- Supply of goods ☐
- Advisory ☐
- Subsistence fisher ☐
- Sport Fisher ☐
- Fishery Association ☐
- Fish Processing ☐
- Food health ☐
- Marketing ☐
- Funding/lending agency ☐
- Tourism ☐
- Conservation ☐
- Government fishery manager ☐
- Other ☐ (specify):

3a. Are you / is your organisation a member of any national/regional committees or multi-stakeholder groups relevant to the fishery?

Yes ☐ No ☐

3b. If your answer to 3a is yes, please specify the name of the committee(s) or multistakeholder group(s) and its/their main focus/interest/activity below:

__________________________________________________________________________

__________________________________________________________________________
SECTION III: SOCIO-ECONOMIC QUESTIONNAIRE

TOURISM SECTOR

30. Are you professional occupied in tourism sector?
   
   Yes ☐
   No ☐
   I have also another profession ______________

31. Which are your Tourism Activities?

<table>
<thead>
<tr>
<th>Types of Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel</td>
</tr>
<tr>
<td>Tour Operator</td>
</tr>
<tr>
<td>Tourist Agent</td>
</tr>
<tr>
<td>Rooms to Let</td>
</tr>
<tr>
<td>Organizing Group Excursion</td>
</tr>
<tr>
<td>Bar / Restaurant</td>
</tr>
<tr>
<td>Other ______________________________</td>
</tr>
</tbody>
</table>

1. Are you interested in fisheries related tourism activities?

<table>
<thead>
<tr>
<th>Level of Interesting</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
</tr>
<tr>
<td>Fair</td>
</tr>
<tr>
<td>Low</td>
</tr>
<tr>
<td>Not at all</td>
</tr>
</tbody>
</table>

2. Are you involved in promoting fishing tourism activities?
   
   Yes ☐
3. If yes, which kind of activities (daily trip on boat, etc...) – please specify
_____________________________________________________________________

4. Did you sell to tourists fishing tourism activities?
Yes ☐
No ☐

If yes, which kind of activities (daily trip on boat, etc...) – please specify
_____________________________________________________________________

5. Did you sell to tourists complete packages including fishing tourism?
Yes ☐
No ☐

If yes, how are they organized – please specify?
_____________________________________________________________________

6. The total number of tourists in the last years who participated in fisheries activities?

<table>
<thead>
<tr>
<th></th>
<th>2011</th>
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<th>2013</th>
</tr>
</thead>
<tbody>
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<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

7. National structure of tourists? Where they come from?
1. ______________________
2. ______________________
3. ______________________
4. ______________________
5. ______________________
8. Age structure of tourists?

9. Price of participation in recreation fishing per person per trip?

10. Which is the percentage of fishing tourism tour income?

11. Do you believe that this percentage will be increased in the future?
   Yes ☐
   No ☐

12. Do the tourists appreciate fisheries related tourism activities?
   Yes ☐
   No ☐
   Please specify why

13. Please describe your suggestions for the future development of fishing tourism sector:

14. Have you ever attended training courses related to your profession activities?
   Yes ☐
   No ☐
   I am not interested ☐

15. Which training topics do you prefer to attend related to tourism industry?

<table>
<thead>
<tr>
<th>Types of Training</th>
</tr>
</thead>
<tbody>
<tr>
<td>Innovation Applications</td>
</tr>
</tbody>
</table>
### New Technologies in Tourism Sector

### Related Activities to Tourism Sector

<table>
<thead>
<tr>
<th>Marketing Procedures</th>
<th>Finance Administration</th>
<th>Infrastructures and Facilities</th>
<th>Other</th>
</tr>
</thead>
</table>

#### 16. Professional Assessment:

<table>
<thead>
<tr>
<th>Question</th>
<th>Disagree</th>
<th>Fair</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>You are satisfied by your profession activities</td>
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<td>3</td>
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<td>3</td>
</tr>
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<td>3</td>
</tr>
<tr>
<td>A parallel activity with fisheries sector will help your sector</td>
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<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

#### 17. Have you ever benefited from European or National Funded Programmes?

- Yes ☐
- No ☐
- Tried Unsuccessfully ☐

#### 18. Are you satisfied by the facilities and infrastructure related to your sector?

<table>
<thead>
<tr>
<th>Level of Satisfaction</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
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<td></td>
</tr>
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<td>Fair</td>
<td></td>
</tr>
<tr>
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<td></td>
</tr>
<tr>
<td>Not at all</td>
<td></td>
</tr>
</tbody>
</table>

#### 19. Needs Assessment:
<table>
<thead>
<tr>
<th>Need</th>
<th>Disagree</th>
<th>Fair</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
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<td>2</td>
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<tr>
<td>Need of financial support to fisheries sector by state-EU</td>
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<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

For the verification of the research process please notify your name or a valid e-mail address_____________________________________________________________
ANNEX III: Lists of Stakeholders
### Croatia

#### Act.2.3 - NEMO project Stakeholders List

<table>
<thead>
<tr>
<th>Stakeholders</th>
<th>Interest</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FISHERMEN</strong>&lt;br&gt;From Split-Dalmatia</td>
<td>First key stakeholders dealing with fisheries and fisheries related tourism</td>
</tr>
<tr>
<td><strong>FISHERIES COOPERATIVES</strong></td>
<td>Stakeholders dealing with representing the interests of the fishermen, collecting their needs and requests.</td>
</tr>
<tr>
<td><strong>GROUP TRAWLERS</strong></td>
<td>Stakeholders dealing with representing the interests of the fishermen, collecting their needs and requests.</td>
</tr>
<tr>
<td><strong>FISHING TOURISM ENTERPRISES</strong></td>
<td>They promote fishing tourism activities through the creation of networks among fishermen</td>
</tr>
<tr>
<td><strong>PUBLIC PROMOTION AGENCIES</strong></td>
<td>They promote and sustain the local tourism and activities</td>
</tr>
<tr>
<td>Croatian Chamber of Economy</td>
<td></td>
</tr>
<tr>
<td>Croatian Chamber of trades and crafts</td>
<td></td>
</tr>
</tbody>
</table>
### Greece

<table>
<thead>
<tr>
<th>Act.2.3 - NEMO project STAKEHOLDERS LIST</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Stakeholders</strong></td>
</tr>
<tr>
<td>FISHERMEN from Mesolonghi, Aegio, Preveza and Arta</td>
</tr>
<tr>
<td>FISHERIES COOPERATIVES</td>
</tr>
<tr>
<td>1. Preveza</td>
</tr>
<tr>
<td>2. Tsoukalio- Rodia</td>
</tr>
<tr>
<td>3. Logarou</td>
</tr>
<tr>
<td>4. Klisova “Anagennisi”</td>
</tr>
<tr>
<td>FISHING TOURISM ENTERPRISES</td>
</tr>
<tr>
<td>1. Aqua action (Mesolonghi)</td>
</tr>
<tr>
<td>2. Monastery of Rodia (Arta)</td>
</tr>
<tr>
<td>TOUR OPERATORS AND THEIR AGENCIES from Mesolonghi and Patras</td>
</tr>
<tr>
<td>PUBLIC PROMOTION AGENCIES (at regional and nagtional level)</td>
</tr>
<tr>
<td>FISHERIES LOCAL ACTION GROUPS (FLAGs)</td>
</tr>
<tr>
<td>1. Aitoliki</td>
</tr>
<tr>
<td>2. Epirus-Amvrakikou</td>
</tr>
</tbody>
</table>
## Act.2.3 - NEMO project STAKEHOLDERS LIST

<table>
<thead>
<tr>
<th>Stakeholders</th>
<th>Interest</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FISHERMEN (SINGLE OR ASSOCIATED)</strong></td>
<td>First key stakeholders dealing with fisheries and fisheries related tourism</td>
</tr>
<tr>
<td><strong>FISHERIES ASSOCIATIONS</strong></td>
<td>Stakeholders dealing with representing the interests of the fishermen, collecting their needs and requests.</td>
</tr>
<tr>
<td><strong>FISHING TOURISM ASSOCIATIONS</strong></td>
<td>They promote fishing tourism activities through the creation of networks among fishermen</td>
</tr>
<tr>
<td><strong>SPORT FISHING ASSOCIATIONS</strong></td>
<td>They support the local tourism linked to the sport fishing and overall fisheries activities</td>
</tr>
<tr>
<td><strong>TOUR OPERATOR AND THEIR AGENCIES</strong></td>
<td>They develop and promote the tourist packages; excursions on boat related to the fishing tourism. Moreover they can support the fishermen activities thanks the services supply</td>
</tr>
<tr>
<td><strong>PUBLIC PROMOTION AGENCIES (AT MUNICIPAL, REGIONAL AND OTHER LEVEL)</strong></td>
<td>They promote and sustain the local tourism and activities</td>
</tr>
<tr>
<td><strong>FISHERIES LOCAL ACTION GROUPS (FLAG)</strong></td>
<td>They manage the Axis 4 of the European Fisheries Fund and support the fisheries sector development at local level</td>
</tr>
</tbody>
</table>