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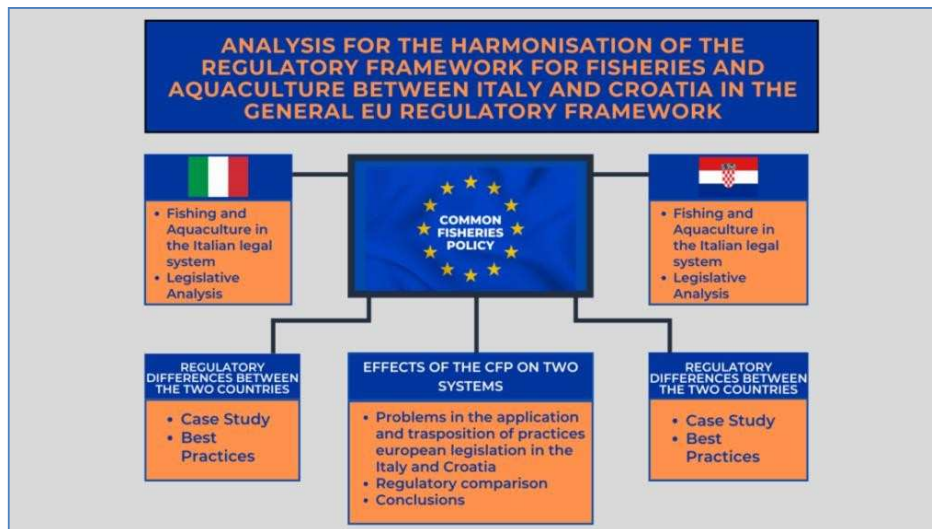
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ABBREVIATIONS, TERMS AND DEFINITIONS

ACRONYM	DEFINITION
CFCA	Community Fisheries Control Agency
EFCA	European Fisheries Control Agency
FPA	Fisheries Partnership Agreements
BBNJ	Biological diversity Beyond areas of National Jurisdiction
RAC	Regionalization Advisory Councils
EC	European Community
EEC	European Economic Community
ICES	International Council for the Exploration of the Sea
IOC	Intergovernmental Oceanographic Commission
OECD	Organization for Economic Co-operation and Development
COFI-FAO	Committee on Fisheries – UN Food and Agriculture Organization
STECF	Scientific, Technical and Economic Committee for Fisheries
DG MARE	Directorate-General Maritime Affairs and Fisheries
EAF	Ecosystem Approach to fisheries
EEZ	Exclusive Economic Zone
EFZ	Exclusive Fishing Zone
EUMOFA	European Market Observatory for fisheries and aquaculture
EMFF	European Maritime and Fisheries Fund
EMFAF	European Maritime, Fisheries and Aquaculture Fund
FLAGs	Fisheries Local Action Groups
CGPM	General Fisheries Commission for the Mediterranean
ICCAT	International Commission for the Conservation of Atlantic Tunas
IMO	International Maritime Organization
IUU	Illegal, Unreported and Unregulated fishing
IOC	Intergovernmental Oceanographic Commission
MCS	Monitoring, Control and Surveillance
MASAF	Ministry of agriculture, food sovereignty and forestry
MSY	Maximum Sustainable Yield
NAFO	Northwest Atlantic Fisheries Organization
OECD	Organization for Economic Cooperation and Development
OEEC	Organization for the European Economic Cooperation
WTO	World Trade Organization
CMO	Common Organisation of the Market in fishery and aquaculture products
RFMOs	Regional Fisheries Management Organisations
EP	European Parliament
PECH	European Parliament's Committee on Fisheries
IMP	Integrated Maritime Policy
SSSF	Satellites Support Sustainable Fishing
SDG	Sustainable Development Goal
TAC	Total Allowable Catch
TFUE	Treaty on the Functioning of the European Union
TEU	Treaty on European Union
UNCLOS	United Nations Conventions on the Law of the Sea
UNESCO	United Nations Educational, Scientific and Cultural Organization
VMS	Vessel Monitoring System
EEZ	Exclusive Economic Zone
MPA	Marine Protected Areas
AZA	Allocated Zones for Aquaculture
DOF	Directorate of Fisheries

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ABSTRACT

The Report was created with the aim of providing information on the current and prospective status of fisheries and aquaculture policies in the Adriatic regions of Italy and Croatia. It is based on a comparative analysis of the regulatory contexts that characterize the sectors of the two states, also focusing on the natural, social and economic characteristics, in order to obtain a decisive objective framework for future and common policies regarding the Adriatic Sea. The Report is structured in 4 chapters.

The first chapter analyzes the state of Community and international law concerning fishing and aquaculture, the evolution of the legislation in the last two decades and the influence of Community legislation on the Italian and Croatian national legal systems.

The second and third chapters are focused on the national fisheries and aquaculture legislation in Italy and Croatia. The main regulatory aspects governing the sectors were analyzed, paying particular attention to specific case studies and best practices which are examples in the two Countries.

The results of the comparative analysis carried out in the second and third chapters were fundamental for the production, in the fourth and in the last chapter, of the final and objective considerations, which highlighted the differences, the similarities and the specificities of the two legal systems in the light of the recent report of the European Commission on the state of fishing and aquaculture in the two Countries.

Going more specifically, from the comparative analysis of the two legislations on fishing and aquaculture, incisive elements emerged which allow us to highlight the strengths and weaknesses of the respective management and programming policies and, above all, the quality of the support provided to the legislator in the harmonization of sectoral legislation

in Italy and Croatia. The political and legislative centralization of Croatia has facilitated the latter in the operation of transfusion of Community legislation within its legal system, harmonizing it and adapting it to its planning and reform perspective. The same goes for the Italian system, which, albeit with considerable differences, appears to have adapted to the requests of the Community legislator, through targeted legislative interventions following the 2013 reform of the common fisheries policy. In this context, initiatives to strengthen cross-border cooperation represent decisive tools in supporting Adriatic policies to respond in a coordinated manner to the common challenges indicated by the legislator, in order to guarantee the conservation, management and sustainable exploitation of fish and aquaculture resources, also taking into account the social and economic aspects and through a strong control system. With a view to shared governance at the level of the Adriatic basin, the fundamental role is underlined, in support of legislators, peripheral authorities, socio-economic and scientific stakeholders and direct participatory approaches in the fisheries and aquaculture sectors.

CHAPTER 1: THE COMMON FISHERIES POLICY

BIRTH AND EVOLUTION OF THE COMMON FISHERIES POLICY (CFP)

The European union, according to art. 38 of the TFEU (Treaty on the Functioning of the European Union), defines and implements a common agricultural and fisheries policy. With this definition, the final result of a progressive development that has affected the fishery during the process of European integration is highlighted.

The original Treaty of Rome, in fact, did not mention fishing as a matter of Community competence but provided for the establishment of a common policy in the agricultural sector, despite the fact that at the beginning of the 1970s a provision contained in Annex II included: fish, crustaceans, mollusks and their derivatives.

It is the **Maastricht Treaty** that gives importance to the matter of fisheries in the context of the competences attributed to the Community, entrusting it for the first time with a mention in the text: Agriculture and Fisheries.

The Common Fisheries Policy (CFP) originates from the 1970 regulations, concerning the common policy of structures in the fisheries sector and the common organization of the markets for fishery products. Here, aspects related to the marketing, promotion and rational development of fishing activities were regulated. And it is precisely from rational development that a first concept of "preservation of marine resources" takes shape, albeit in an embryonic way.

With **Regulation n.170**, the first community regime for the conservation and management of fishery resources was finally born in 1983. This new regime is based on common rules for the conservation and exploitation of the biological resources of the sea aimed at

guaranteeing: protection and balance. We find the first hints of allowable catch quotas for certain stocks through the so-called principle of relative stability, that is the political commitment of the Council to entrust each Member State with a total allowable catch determined by the historicity of the catch of the same State in previous years. In this way a fixed percentage of catch was guaranteed, thus ensuring socio-economic stability to the sector.

The growing problem of overexploitation of resources and the consequent need to downsize the fishing capacity of the Community fleet, accelerated the ratification process of the 1992 regulation through the establishment of the "Community fisheries and aquaculture regime". In 1992, with **Regulation (EEC) no. 3760/92**, an attempt was made to remedy the serious imbalance between the capacity of the fleet and the potential for catching by introducing for the first time the notion of "**fishing effort**" to restore and maintain the balance between available resources and fishing activities .

Access to resources was provided through an effective licensing system.

These three events had repercussions on the size and structure of the Community fleet and its catch potential.

The measures introduced by Reg. (EEC) no. 3760/92 did not prove effective enough to put an end to overfishing, and the deterioration of many fish stocks even accelerated.

In the 2001 Green Paper, drawn up in view of the revision of the regulations scheduled for the following year, the Commission highlighted the worrying state of the fish stock present in EU waters. This critical situation led to a reform that included three regulations adopted by the Council in December 2002 and which entered into force on 10 January 2003:

- **Regulation (EC) no. 2371/2002** of the Council, of 20 December 2002, on the conservation and sustainable exploitation of fishery resources within the framework of the common fisheries policy. They repeal regulations (EEC) n. 3760/92 and (EEC) n. 101/76;
- **Regulation (EC) no. 2369/2002** of the Council, of 20 December 2002, amending Regulation (EC) no. 2792/1999 which defines the terms and conditions of Community structural actions in the fisheries sector;
- **Regulation (EC) no. 2370/2002** of the Council of 20 December 2002 establishing an emergency Community measure for the scrapping of fishing vessels.

Principles of good governance, multi-year strategy, management and planning, for the first time sanctioned the total autonomy of a sector that has not always lived in the generic regulations. Suffice it to say that the 2002 regulation still reserves a central role to the Council, not only in establishing the measures for accessing water and resources, but also in determining recovery and management plans.

The 2007 Lisbon Treaty (Treaty on the Functioning of the European Union - TFEU) introduced numerous changes to the fisheries policy.

In 2013, the Council and the Parliament reached agreement on a new CFP, aimed at ensuring the long-term sustainability of fisheries and aquaculture activities from an environmental, economic and social point of view.

In 2009, the Commission launched a public consultation on the reform of the CFP, with the aim of integrating the new principles aimed at regulating EU fisheries in the 21st century. After a long discussion in the Council and, for the first time, in Parliament, an agreement was reached on 10 May 2013 on a new fisheries regime based on three main pillars:

- the new CFP (**Regulation (EU) No. 1380/2013**);
- the common organization of the markets in the fishery and aquaculture products sector (**Regulation (EU) no. 1379/2013**);
- the new European Maritime and Fisheries Fund (**Regulation (EU) No. 508/2014**).

The new CFP is aimed at ensuring that the activities of the fishing and aquaculture sectors are sustainable in the long term from an environmental point of view and are managed in a manner consistent with the objectives relating to the economic, social and employment benefits to be achieved.

The most significant points are:

- Multiannual ecosystem-based management to strengthen the role that the previous reform had accorded to multiannual plans, but also by adopting a more ecosystem-oriented approach, with plans for multiple species and for fisheries, within the regional framework of the geographical areas of EU;
- Maximum Sustainable Yield (MSY): taking into account international commitments, such as those made in the context of the 2002 Johannesburg Sustainable Development Summit, the new CFP sets MSY as the main target for all fisheries. Where possible by 2022 at the latest, the mortality of fish species will be fixed at FMSY (the maximum fishing mortality rate for a given stock, which is used to calculate the stock MSY);
- Discard ban: the new reform will put an end to one of the most unacceptable practices in EU fishing activities. The discarding of regulated species must be phased out and, in parallel, accompanying measures will be introduced to implement the ban. Since 2019, the new discard policy has been applied in all EU fisheries.

As regards fleet capacity, with the new CFP, Member States are required to adapt their fishing capacities through national plans so that they are balanced with their fishing opportunities.

Small-scale fishing has a particular role to play in the new CFP. The exclusive 12 nautical mile zone for traditional fleets has been expanded until 2022.

Regulation (EU) no. 2403/2017, which defines the rules relating to the fishing activities of the EU fleets in international waters and outside the Union, was drawn up in the context of EU external relations and in line with the principles of the EU's policy.

The provisions relating to fishing in these waters are linked to partnership agreements for sustainable fisheries and EU participation in regional fisheries management organizations. Sustainable aquaculture, which increases yields to supply the EU seafood market, must promote growth in coastal and rural areas through national plans.

The new obligations require Member States to strengthen the role of science by stepping up data collection and information sharing on stocks, fleets and the impact of fishing activities. Furthermore, decentralized governance is needed, bringing the decision-making process closer to that of fishing areas.

EU lawmakers set the overall framework while Member States develop implementing measures, cooperating with each other at the regional level.

The current set of technical measures defined by **Regulation (EC) no. 850/98** of the Council constitutes a complex and heterogeneous system of provisions which is currently being revised to provide the new CFP with a new set of technical measures.

The reform package also includes the common organization of the markets in the fishery and aquaculture products sector.

The new European Maritime and Fisheries Fund (EMFF) is the financial instrument to help implement the CFP and the common organization of the markets in the fishery and aquaculture products sector.

The purposes of the CFP can therefore be traced back to the following objectives:

- a) to ensure that fisheries and aquaculture are ecologically, economically and socially sustainable;
- b) ensure that they are a source of healthy food for EU citizens;
- c) promote dynamic fishing industry ensuring good living standard for fishing communities.

While it is important to maximize catches, limits need to be set. It is necessary to ensure that fishing practices do not prevent fish from reproducing.

The CFP also adopts a prudent approach that recognizes the impact of human activities on all components of this ecosystem.

Fishing fleets will have to apply more selective catching systems and progressively abolish the practice of discarding unwanted catches.

The CFP provides EU Countries with tools for greater control at regional and national level.

It is divided into four sectors:

- 1. fisheries management;
- 2. international politics;
- 3. markets and commercial policy;
- 4. financing of fisheries policy (EFF 2007-2013, EMFF 2014-2020, EMFF 2021-2027)

The CFP also sets rules on aquaculture and stakeholder participation.

The primary regulatory source is found in **Regulation (EU) no. 1380/2013 of 11 December 2013** relating to the common fisheries policy, which amends regulations (EC) no. 1954/2003

and (EC) n. 1224/2009 of the Council and repealing regulations (EC) no. 2371/2002 and (EC) no. 639/2004 of the Council, as well as Council Decision 2004/585 / EC.

To ensure compliance with fishing rules, the EU also has a system of controls and the necessary tools to ensure their application, such as, for example, inspections at sea.

To enforce the rules of the common fisheries policy, there is a control system aimed at:

1. ensure that only authorized quantities of fish are caught;
2. collect the data necessary to manage fishing opportunities;
3. clarify the role played by EU Countries and the Commission;
4. ensure that the rules are applied in the same way to all fishermen and that uniform sanctions exist across the EU;
5. ensure that fishery products are traceable and controlled at all stages of the supply cycle, from catch to fork.

The system is governed by **Regulation (EC) N. 1224/2009** establishing a Community control system to ensure compliance with the rules of the common fisheries policy, which entered into force on 1 January 2010 and has radically modernized the EU strategy in this area.

In particular, it introduced changes in line with the stringent measures adopted by the EU in 2008 to combat illegal fishing.

Information relating to all fishing vessels registered in the national registers of individual Member States is contained in the Fleet Register (FR), established by art. 15 of Regulation (EC) no. 2371/2002.

This is an electronic archive of fishing vessels vessel managed by the European Commission. The management of this database allows you to:

1. monitor the progress of the fishing capacity of the Member States;
2. have a database for verification and inspection operations;
3. compile statistics for the management of the CFP;
4. use a database for other international organizations.

Each unit is assigned a unique and indissoluble identification number, it is kept even in case of export within the EU Countries, with which it is possible to trace the history of each vessel starting from its entry into service until its exit from the fleet. community fishing.

INTERNATIONAL RELATIONS IN THE FIELD OF FISHERIES AND AQUACULTURE

Even before the European Union (EU) exercises its exclusivity in the regulation and management of the biological resources of the sea, the Court of Justice recognizes that the power to issue such measures extends, on the basis of international agreements and conventions, by the Member States with a transitory character. With this, we underline that the competence of the States is replaced by that of the EU and the latter, on its own, will join the international fisheries organizations.

In parallel, it is up to the EU to conclude agreements with third states for access to fishery resources in the waters under their jurisdiction. These agreements will ensure that the European fleet can fish beyond the EU borders.

Indeed, based on the objectives of the CFP and on the principles of good governance, the EU engages in numerous multilateral agreements and regional fisheries management organizations (RFMOs), as well as in 30 bilateral fisheries agreements. And it is with this dense network of international agreements that the EU consolidates its role in international cooperation for the management of resources in all seas.

The creation of bilateral and multilateral fisheries agreements became necessary following the establishment of Exclusive Economic Zones (EEZs) in the mid-1970s. In 1982 the United Nations adopted the Convention on the Law of the Sea (UNCLOS), which entered into force in 1994, to be considered as a sort of constitution for the oceans, which recognized the right of coastal states to control fishing in neighboring waters. Although the EEZs occupy only 35% of the total sea surface hosts 90% of the world's fish stocks. UNCLOS governs not only the EEZs, but also the high seas. It encourages states to collaborate with each other on the conservation and management of deep-sea marine biological resources through the creation of regional fisheries management organizations (RFMOs). Consequently, it have access to the fishery resources of the EEZs of third Countries.

In fact, if we analyze the Montego Bay Convention, both the conservation needs of biological resources (art. 117, 118, 119) and their protection needs (art. 192, 193, 194) are highlighted. It seems useful, at this point, to draw a distinction between the concept of conservation of the biological resources of the sea and that of their protection.

The term "conservation" refers to those measures that allow the constant optimal yield of resources; the term "protection" instead, indicates a need to safeguard certain species regardless of the purpose of exploiting them.

The EU and its Member States are part of UNCLOS and have also collaborated in developing other tools to further implement sustainable fisheries agreements. The United Nations Agreement on Fish Stocks (UNFSA) marked an important step towards joint international governance in the fisheries sector and generated two different types of bilateral agreements:

- Partnership agreements for sustainable fisheries

Sustainable Fisheries Partnership Agreements (APPS) are international agreements concluded by the EU with a number of third Countries to gain access to the Country's

exclusive economic zone (EEZ) in order to sustainably catch surplus allowable catches in a legally regulated context. In order to ensure the sustainable exploitation of marine biological resources, the determination of these surpluses must be based on the best available scientific advice, the relevant exchange of information and transparency. The agreements should be mutually beneficial for the EU and the third Country concerned. Therefore, in exchange for fishing rights, the EU provides financial contributions to its partners under the APPS, including payments for access rights and sectoral support.

- Reciprocal agreements

Reciprocal agreements are also known as "Nordic agreements". They are linked to the North Sea and the North-East Atlantic and involve the exchange of fishing opportunities between the fleets of the EU and three third Countries (Norway, Iceland and the Faroe Islands), thus fostering joint management of stocks common. The reference used to ensure parity in trade is "cod equivalent", whereby one ton of cod corresponds to a certain number of tons of the species being traded.

The EU has thus become a key player in international fisheries governance.

Another key role is played by the Regional Fisheries Management Organizations (RFMOs) are international organizations made up of Countries that have fishing interests in high seas. The EU plays an active role in many RFMOs, to which it calls for conservation and management measures, provides financial contributions for research and other support measures. The aim of these agreements is to strengthen regional cooperation in order to ensure the conservation and sustainable exploitation of deep-sea fishery resources and transactional fish stocks. They perform another essential function, namely the prevention of illegal, unreported and unregulated fishing (3.3.3). RFMOs are of various kinds: some were established under the aegis of the Food and Agriculture Organization of the United Nations (FAO), while others were independent; some manage the biological resources of a particular area, while others deal with a particular stock or groups of stocks; some concern only the high seas or the EEZs, others concern both areas. When the Commission enters into negotiations with RFMOs, it intervenes on two fronts: participation in the organization, as a counterparty or observer, and the definition of rules aimed at implementing, within the framework of EU law, conservation and management adopted by organizations. RFMOs also work to establish measures for the control and monitoring of fisheries activities, such as the adoption of joint inspection systems, within the Northeast Atlantic Fisheries Commission (NEAFC), of the Organization Northwest Atlantic Fisheries (NAFO), of the General Fisheries Commission for the Mediterranean (GFCM) and of the Commission for the Conservation of Antarctic Living Marine Resources (CCAMLR), which is a conservation organization. The EU currently plays an active role in six and 11 non-tuna RFMOs. It also participates in two RFMOs which are only advisory bodies and have no competence in fisheries management, namely COPACO (Western Central Atlantic Fisheries Commission) and CECAF (Eastern Central Atlantic Fisheries Committee).

- Legal basis

Articles 38 to 43 of the Treaty on the TFEU. International fisheries agreements are ratified by the Council after obtaining the consent of the Parliament (Article 218 (6) (a) TFEU). And it is with this dense network of international agreements that the Union consolidates its role in international cooperation for the management of resources in all seas, from the Montego Bay Convention to the Agreement on the international program for the conservation of dolphins, and the agreements reached within the FAO to prevent, combat and eliminate illegal and unregulated fishing.

Access to Union waters by third State fishing vessels is also ensured, according to the principle of reciprocity, by agreements concluded by the Union with other third States, for example the setting of total allowable catches for common stocks. jointly managed. These agreements give life to the principle of cooperation contemplated, in fact, by international law. The basic regulation provides that the Union will endeavor to conclude "in compliance with the Convention on the Law of the Sea" bilateral or multilateral agreements with third Countries for the joint management of stocks, methods of access to waters and resources in a harmonious manner.

As we said previously, the Montego Bay Convention highlights both the conservation needs of biological resources and their protection needs.

The objective of the international community is, essentially, to avoid overexploitation phenomena which can cause the impoverishment or even the exhaustion of the fish resources themselves.

FISHERIES MANAGEMENT IN THE FRAMEWORK OF THE COMMON FISHERIES POLICY

Since the entry into force of the Lisbon Treaty, EU Parliament has played a decisive role in drawing up legislation on fisheries management. The introduction of the rule according to which the definition of a common policy must take into account the specific characteristics of fishing, emphasizes precisely the need to balance the different needs. Under the Common Fisheries Policy (CFP), fisheries management is based on the need to ensure the environmentally sustainable exploitation of marine biological resources and the viability of the sector in the long term. To achieve this, the EU has adopted legislation governing access to its waters, the allocation and use of resources, total allowable catches, limitation of fishing effort and other technical measures.

The first basic regulation of 1983 stated that it wanted to ensure the protection of the seabed, the conservation of marine biological resources and their balanced exploitation on a sustainable basis, in economic and social terms.

In the subsequent 1992 regulation, the objective is underlined and reiterated with the exception that this time we are talking about consumers and producers.

The 2002 regulation definitively states the objective of "sustainable exploitation" of resources aimed at guaranteeing an economically profitable and competitive fishing, in order to ensure a fair standard of living for those who depend on fishing activities. Finally, with the basic regulation of 2013, a perspective is adopted which marks even more clearly the specificity of the sector. In fact, it expresses that the CFP increasingly intends to ensure that "fishing and aquaculture activities are sustainable from an environmental point of view in the long term and are managed in a manner consistent with the objectives at an economic, social and employment level".

There is a subtle difference between regulation 1318/2013 and 2002 regulation, that is, in the 2013 one we talk about "availability of food supply" through the specific purposes of resource governance policies (see for example: the contrast of discards and unwanted catches, the better management of aquaculture, the environmental and climate impact).

Hence the so-called "environmental integration", that is the desire to reconcile fisheries policy and environmental policy with the aim of guaranteeing a general guiding principle in fisheries and aquaculture policies, not only in terms of access limitation to resources, but to the restoration of the single fish species considered from time to time and, more broadly, to the protection of the general state of marine ecosystems.

Paradoxically, environmental integration can be considered as the evolution of the precautionary principle introduced in the Union's legal system by the Maastricht Treaty.

The main objective, therefore, is to ensure the viability of the sector in the long term through the sustainable exploitation of resources. The legislator, taking into account the principles of environmental integration and rationality, has expressed himself in recent years through a

landed; - measures to reduce discards, such as the development of pilot projects to explore ways to reduce unwanted catches.

In 2020, the EU fleet maintained its overall profitability, posting good gross and net profit margins of around 26% and 14% respectively, i.e. almost € 1.5 billion in gross profit and 800 € million of net profits. These figures indicate considerable resilience, resulting from low fuel prices combined with the efforts made by the industry in previous years to achieve maximum sustainable yield (MSY). This is a prime example of the benefits of an EU blue economy inspired by sustainability.

The socio-economic data available suggests, in particular, that the economic performance and wages of EU fishermen tend to improve when fleets depend on sustainably fished stocks and instead tend to remain unchanged when stocks are undergoing fishing activity, overfishing or are over-exploited.

The results differ markedly from one fleet category to another and from one fishing region to another. The segments that operating in the Atlantic and the North Sea have achieved economic results superior to those of the Baltic and the Mediterranean, where numerous stocks are still grappling with the problem of overfishing and over-exploitation.

THE FISHING SECTOR IN NUMBERS

The fisheries sector is of fundamental importance for the EU, for blue growth, for citizens and for the communities concerned. About 350.000 people in the EU work in fisheries and aquaculture, and the gross value added of seafood processing corresponds to 6% of the entire food industry. The EU imports fish products for 25 billion euros and exports 4,7 billion euros; in addition, many European companies work large portions of their production outside the EU, so there are many workers around the world who supply fish products to the European market.

The 2020 Annual Economic Report (ARE) on the fishing fleet of the European Union, on the other hand, gives us a comprehensive overview of the structure and economic development of the fishing fleets of the EU Member States. This report covers the period from 2008 to 2020 and includes information on the fishing capacity of the EU fleet, employment, landings, revenues and costs.

The reference year is 2018 with performances expected for 2019 and 2020, where possible. All monetary values have been adjusted to inflation at constant 2015 prices. So, comparing them to current data from August 2022, we can perceive how any assessment on the merits is susceptible to the social and economic changes of the moment.

The recent EU report, which provides an overview of the structure and economic performance of the 22 coastal fishing fleets of member states, **shows the differences in performance between fleet categories and fishing regions**. Large fleet segments performed better economically than small coastal fleet segments. As well as fleet segments operating in the Northeast Atlantic, where most of the stocks fished are managed at sustainable levels,

have outperformed fleet segments operating in the Mediterranean and Black Sea regions, where many stocks still face overfishing.

These results, elaborated thanks to the teamwork of economic experts from the Scientific Technical and Economic Committee for Fisheries (STECF) and the European Commission, demonstrate that **there is a strong link between sustainable fishing, economic performance, better salaries and new job opportunities in the coastal communities.** Sustainable fishing practices also promote fuel efficiency, as fleet segments targeting sustainably managed fish stocks require less effort (i.e. fewer days at sea).

Let's analyze the current situation of the European fleet (Fig. 1).

II ✕	VOLTA	2014	2015	2016	2017	2018	2019	2020	2021
GEO									
Unione Europea (EU6-1958, EU9-1973, EU10-1981, EU1...	85 989	84 203	83 579	82 647	81 639	75 157	74 806	74 556	
Unione Europea - 27 paesi (dal 2020)	:	:	:	:	:	:	:	:	:
Unione Europea - 28 paesi (2013-2020)	:	:	:	:	:	:	:	:	:
Area euro - 19 paesi (dal 2015)	:	:	:	:	:	:	:	:	:
Belgio	79	76	72	70	68	67	63	65	
Bulgaria	2016	1970	1919	1888	1854	1 841	1826	1 814	
Cechia	:	:	:	:	:	:	:	:	:
Danimarca	2 447	2 356	2 261	2 198	2 123	2 077	2 029	1 971	
Germania (fino al 1990 ex territorio della FRG)	1 491	1 443	1 414	1 377	1 331	1 309	1 292	1 257	
Estonia	1 515	1 538	1 557	1 595	1665	1742	1828	1 889	
Irlanda	2 157	2 141	2 114	2 022	2 035	2 040	2 034	2 032	
Grecia	15 603	15 351	15 176	14 982	14 745	14 689	14 619	14 551	
Spagna	9 632	9 397	9 244	9 145	8973	8883	8 838	8 730	
Francia	7 066	6 904	6 833	6 509	6 373	6 228	6 197	6 229	
Croazia	7 736	7 727	7 627	7 559	7 566	7 604	7 543	7 507	
Italia	12 435	12 300	12 260	12 252	12 102	12 127	12 152	12 179	
Cipro	949	831	841	804	806	809	806	808	
Lettonia	700	686	686	675	671	667	668	653	
Lituania	142	145	142	144	143	139	140	132	
Lussemburgo	:	:	:	:	:	:	:	:	:
Ungheria	:	:	:	:	:	:	:	:	:

Figure 1 - Last update: 14/03/2022 23:00 - Data source: Eurostat (FISH_FLEET_GP)

Note: SM = Member State, BE = Belgium, BG = Bulgaria, CZ = Czech Republic, DK = Denmark, DE = Germany, EE = Estonia, IE = Ireland, EL = Greece, ES = Spain, FR = France, HR = Croatia, IT = Italy, CY = Cyprus, LV = Latvia, LT = Lithuania, HU = Hungary, MT = Malta, NL = Netherlands, AT = Austria, PL = Poland, PT = Portugal.

Source: Fact Sheets on the European Union - 2025 www.europarl.europa.eu/factsheets/it

SM	Pesca (2018)	Acquacoltura (2016)	Trasformazione (2017)
	ETP	ETP	ETP
BE	212	3	1 072(1)
BG	622	923	1 490
CZ	—	904	757
DK	1 642	366	3 153
DE	1 150	983	5 885
EE	266	34	1 348
IE	2 745	1 027	3 138
EL	18 432	3 482	2 130
ES	27 060	6 534	19 826
FR	6 491	8 837	11 021
HR	3 122	1 625	1 672
IT	20 065	3 289	4 568
CY	748	459	—
LV	288	169	3 125
LT	365	301	3 744
HU	—	1 274	14
MT	594	256	72
NL	1 678	206	2 227
AT	—	171	117
PL	2385	5 256	17 578
PT	7 922	829	7 415
RO	60	2 912	1 006
SI	64	20	130
SK	—	385	632 ⁽²⁾
FI	230	341	760

Table 1 - Employment in the fisheries sector (2018), aquaculture (2016) and in the fishery product processing sectors (2017) measured in full-time equivalents (FTE).

Why is the seafood sector important?

- It occupies a notable place in the global food industry, accounting for 20% of the 120 billion euros of food imported from the EU.
- The EU fishing sector is the fourth largest in the world, producing 6.4 million tonnes of fish annually with a landing value of € 7 billion (STECF, 2017).
- In 2015, the EU fishing fleet consisted of 84.420 vessels carrying 152.700 fishermen. The average annual salary is estimated at € 24.800.
- The seafood sector as a whole, including processing, employs 350.000 people in all the EU Countries.
- In 2018, the seafood processing sector alone generated 6.4 billion euros of Gross Value Added (GVA) equal to 6% of the GVA created by the food industry as a whole and almost double of the fishing fleet GVA and 5 times GVA of aquaculture. In many Member States, the processing of fish products brings between 50 and 90% of added value to the fishing industry. In addition to contributing to a large share of fisheries employment, the processing industry plays an important role in the development of coastal communities.

The European fish market in figures

The European Union is one of the main world markets for fish products: in 2019, apparent consumption amounted to 12,30 million tones in live weight, equal to about 24 kg per capita of live weight.

Consumption, however, varies considerably within the Member States of the European Union, ranging from 60 kg per capita of live weight in Portugal to 6 kg per capita of live weight in the Czech Republic.

The annual expenditure of EU households for the purchase of fish products exceeds 130 euros per capita, a figure equal to a quarter of the amount spent on meat.

The most consumed products are Tuna (mainly canned), Salmon, Cod, Alaska Pollack, Shrimp, Mussels, Hake and Herring.

The EU meets the internal demand for fish products mainly through imports, which cover about 60% of the total supply.

Salmon, Cod, Tuna, Alaskan Pollack, Fishmeal and Shrimp are the most imported products. On the other hand, almost 15% of the EU market supply is exported. The most exported products are herring, mackerel, blue whiting, tuna, fishmeal and fish oil.

The EU is the world's fifth largest producer of fishery and aquaculture products; in 2019, it covered about 3% of world production (5% of catches and 1% of farmed fish products).

The catches of the EU fleet exceed 80% of the supply, while the remaining 20% is represented by aquaculture products.

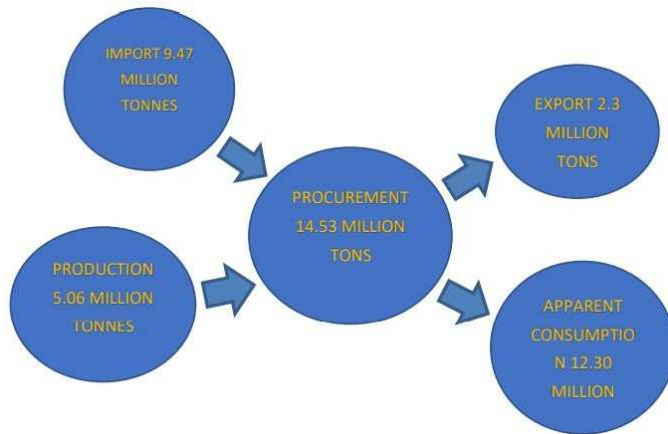


Figure 2 - Production, import and export of fishery and aquaculture products by product group in 2018 (equivalent live weight - for food use only). Source Eumofa.

THE STRATEGY FOR THE SUSTAINABLE DEVELOPMENT OF EUROPEAN AQUACULTURE

As far as the Union legislation currently in force is concerned, it is necessary, in addition to recalling the main Regulations which govern the aspects directly connected to the aquaculture sector, to report the main strategies which the European Union has adopted in order to achieve the objectives of the new European Green Deal and also those established by the United Nations Agenda 2030.

The **New Green Deal** represents a strategy for the growth of the EU which, through a participatory process, aims to unite the actions of individual citizens, cities and regions by helping companies to use more eco-sustainable technologies for their activities, creating new jobs work and facilitating the transition to a circular and sustainable economy leading to zero emissions by 2050. To achieve this goal it will be necessary to act in all sectors of our economy. The first goal set is the 50% reduction of greenhouse gas emissions by 2030. The Green Deal includes 3 strategies that closely concern aquaculture and related aspects.

1. **The Biodiversity Strategy for 2030** represents a long-term plan to protect nature and reverse the degradation of ecosystems. The strategy aims to put Europe's biodiversity on the path to recovery by 2030 by undertaking specific actions and commitments. This strategy also aims to strengthen the resilience of habitats and societies against future threats such as: climate change; forest fires; food insecurity; epidemics.
2. **The Farm to Fork Strategy** aims to accelerate the transition to a sustainable food system with a neutral or positive environmental impact. This should then help mitigate climate change, reverse biodiversity loss and ensure food security. The aim is to ensure that everyone has access to sufficient, safe, and sustainably produced food. The EU will

support the global transition towards sustainable agri-food systems, such as aquaculture, through its trade policies and international cooperation instruments.

3. **The Framework Directive 2008/56/EC on the strategy for the marine environment**, transposed in Italy by Legislative Decree (LD) N. 190/2010, represents an innovative instrument for the protection of the seas since it constitutes the first law binding the States Members to consider the marine environment from a systemic point of view. The objective of the Directive is to develop the economic potential of the marine-coastal belt in harmony with the environment.

LD N. 190/2010 incorporates the fundamental principles of the Directive and the phases envisaged by it. Decisions on actions are taken through Ministerial Decrees and, for the Measures, through a Prime Minister's Decree. This decree launched the institutional implementation process of the Strategy in Italy which envisaged the assessment of the state of the marine environment and the impact that anthropic activities have on it; the determination of Good Environmental Status through qualitative descriptors of the marine environment; the definition of environmental goals; the development of monitoring programs aimed at assessing the effectiveness of the Measures. (Source: Strategic Plan for Italian Aquaculture 2021-2027).

Going into the specifics of the indications produced by the EU, we must start from the assumption that aquaculture, unlike fishing, is an expanding sector. The aim therefore will be to increase production, the number of businesses and employment in the sector, trying to identify strategies for a completely sustainable development.

Unlike the global aquaculture, European aquaculture did not have the same production exploit between the 90s and 2000s. For this reason, since 2002 (Fig. 3), the EU has attempted, with various strategies and measures, to overcome the stagnation. It was also important to better regulate the sector which, in some Member States, was not regulated in terms of environmental impact and eco-compatibility.



Figure 3 - Evolution of communications and measures adopted by the European community in the aquaculture sector



2002 - A strategy for the sustainable development of European aquaculture

In 2002 the European Commission published its first Communication on the topic entitled "A strategy for the sustainable development of European aquaculture".

The objectives of the strategy were the follows:

- to create stable and lasting employment, particularly in areas dependent on fisheries, and increase employment in the aquaculture sector, creating 8.000 to 10.000 full-time equivalent jobs between 2003 and 2008;
- to guarantee the consumer the availability of healthy, safe and good quality products, as well as to promote high levels of animal health and welfare;
- to support an environmentally friendly activity.

Despite this strategy, European production has not exploded as expected and, consequently, employment in the sector has grown, but not at the hoped-for levels.

2009 - Building a sustainable future for aquaculture - A new impulse to the strategy for the sustainable development of European aquaculture

Trying once again to reverse the trend, on 8 April 2009 the European Commission published a second Communication on aquaculture, in order to identify and address the causes of stagnation in production. The new Communication, entitled "Building a sustainable future for aquaculture - A new impetus for the strategy for the sustainable development of European aquaculture", aimed not only at increasing production and employment in the sector, but also at making more eco-sustainable aquaculture and to make it known to the consumer through some strategies:

A. Promote the competitiveness of EU aquaculture production

- to encourage research and technological development;
- to promote spatial planning of aquaculture to try to solve the problem of competition in terms of available space;
- to meet market demands;
- to develop aquaculture in its international dimension.

B. Establish the conditions for sustainable development of aquaculture

- to ensure compatibility between aquaculture and the environment;
- to promote the high performance of the aquaculture industry;
- to protect the health of consumers and raise awareness of the health benefits of food of aquatic origin.

C. Improve the image and governance of the sector

- to improve the application of EU legislation;
- to reduce administrative burdens;
- to increase stakeholder participation and convey correct information to the public;
- surveillance of the aquaculture sector.

2013 - Strategic guidelines for the sustainable development of EU aquaculture

These strategies and objectives were then taken up by the "Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions - Strategic guidelines for the sustainable development of aquaculture in the EU", released in April 2013, and motivated by the fact that "European aquaculture makes it possible to obtain quality products in compliance with strict standards on environmental sustainability, animal health and consumer protection [...] however, in the face of significant growth in other regions of the world, EU aquaculture production remains stationary".

The 2013 Communication emphasized four priority areas:

1. Simplify administrative procedures;
2. Development and sustainable growth of aquaculture thanks to coordinated planning of the marine space;
3. Promote the competitiveness of aquaculture in the EU;
4. Promote a level playing field for EU operators by exploiting their competitive advantages.

Simplify administrative procedures

The Commission specified that the data available for an analysis of the timing of issuing an authorization in EU Countries were still few and that an analysis of the main bottlenecks had not yet been made. From the few data collected, however, an estimate of the time required to obtain a license in the various European states emerged and these were too long (2-3 years) and the problem had to be resolved absolutely.

Norway was taken as a model which, with the creation of a 'one-stop shop' for requests, had halved the time required to obtain authorization from 12 to 6 months.

Sustainable development and growth of aquaculture thanks to coordinated planning of the marine space

Several studies have shown that having land use plans can help reduce uncertainty, facilitate investment and accelerate the development of sectors such as aquaculture and offshore renewable energy production.

Lack of space is often cited as an obstacle to the expansion of marine aquaculture in the EU. It is possible to remedy this shortcoming by identifying in advance the "most suitable sites for aquaculture". If not properly designed and monitored, aquaculture activities can significantly affect the environment.

For this reason, certain environmental impacts of fish farming (such as nutrient enrichment or contamination by hazardous substances) are expressly governed by EU legislation.

As for shellfish farming, on the other hand, this can cause an excess of organic matter on the seabed and changes in sedimentation or currents.

All these aspects are influenced by factors such as the type of organisms raised, the location of the plant and the vulnerability of the surrounding and underlying environment of the

farm. According to a study by the European Parliament, the assessment of these environmental aspects as part of the spatial planning process can reduce the administrative burden for entrepreneurs and limit uncertainty in authorization procedures, thus favoring investments.

Various studies and experiences gained in other industrial sectors confirm that, in addition to increasing the chances of success of new projects, the fact of taking these aspects into account during the planning process allows to minimize environmental impacts, contain local opposition. and avoid unnecessary delays.

Experiences of this type can offer useful information to farmers and help increase the sustainability, social acceptance and competitiveness of EU aquaculture.

Promote the competitiveness of aquaculture in the EU

One of the objectives for member states should be to make use of all the funding possibilities offered by the new "Common Market Organization" (CMO) and the EMFF to support the growth of aquaculture enterprises, with an emphasis on developing of production and marketing plans and supporting education and vocational training programs to meet the needs of the sector.

Promote a level playing field for EU operators by exploiting their competitive advantages

The existence of strict rules on the environment, animal health and consumer protection constitutes one of the main competitive advantages of European aquaculture and should be exploited more effectively to face competition on the markets.

Taking due account of the sustainability of European aquaculture products and informing consumers about it can only strengthen the competitiveness of this sector and its products and encourage their acceptance by society. The new labeling provisions proposed in the CMO regulation can help differentiate European aquaculture products more effectively by differentiating them from others.

In an increasingly aware society, consumers, NGOs and retailers want to be sure that the products they buy have been produced in compliance with strict environmental and social sustainability standards and experience in the agricultural sector confirms that there is a growing demand for sustainable and high quality food products.

Multi-year national strategic plan for the promotion of sustainable aquaculture

To facilitate better coordination of actions aimed at promoting aquaculture, the European Commission has proposed to the Member States to develop a multi-year national strategic plan based on the strategic guidelines produced by the EU. To facilitate the work of the Member States, the Commission has drawn up a plan for drafting the plan which is divided into 4 main points (Fig. 4).

1. National context and link with main national objectives
2. Response to strategic guidelines

- (a) Simplify administrative procedures;
- (b) Ensure the sustainable development and growth of aquaculture through coordinated maritime spatial planning;
- (c) Promote the competitiveness of aquaculture in the EU;
- (d) Promote a level playing field for EU operators by exploiting their competitive advantages

3. Governance and partnership

4. Best practices

- Draft outline for multiannual national plan for the development of sustainable aquaculture**
1. National context and link with main national objectives
 - National situation and strategic approach towards the EU main objectives
 - Quantified national growth objective (2014-2020)
 2. Response to the strategic guidelines
 - (a) **Simplify administrative procedures:**
 - (1) Assessment of the national situation:
 - (a) Qualitative description of the administrative set-up (main bodies responsible for licencing, distribution of responsibilities between administrations, etc.)
 - (b) Quantitative data and explanations: see list in the main text
 - (2) Main elements of the intended policy response: planned actions to reduce the administrative burden
 - (3) If applicable, corresponding quantified targets and indicators (e.g. expected reduction in administrative costs and/or time, etc.)
 - (b) **Securing sustainable development and growth of aquaculture through coordinated spatial planning:**
 - (1) Assessment of the national situation: existing framework for spatial planning (marine and on land), distribution of competences, spatial plans already in place.
 - (2) Main elements of the intended policy response: how spatial planning will be promoted taking into account the needs of aquaculture
 - (3) Where applicable, corresponding quantified targets and indicators (e.g. number and surface of new designated areas for aquaculture, number of regional plans adopted)
 - (c) **Enhance the competitiveness of EU aquaculture:**
 - (1) Assessment of the national situation: strengths and weaknesses of the national aquaculture sector, existing R&D support, areas where increased competitiveness is most needed
 - (2) Main elements of the intended policy response: planned activities to support innovation and links between R&D and the industry; etc.
 - (3) Where applicable, the corresponding quantified targets and indicators (e.g. n. of partnerships between industry and R&D actors)
 - (d) **Promoting a level playing field for EU operators by exploiting their competitive advantages:**
 - (1) Assessment of the national situation: producers organisations, existing schemes to recognise sustainability (e.g. voluntary schemes used by major national retailers), perception of aquaculture by the general population
 - (2) Main elements of the intended policy response (2014-2020): actions foreseen to improve the image of EU aquaculture products (e.g. communication campaigns, support to participation in voluntary schemes, support to organic aquaculture)
 - (3) Where applicable, corresponding quantified targets and indicators (e.g. percentage of organic and/or certified aquaculture, etc.)
 3. Governance and partnership
 - Key contributions from the main actors involved (regional and/or local authorities, industry, stakeholders and NGOs)
 - Link with the EMFF OP priorities and financial allocations (EMFF and other EU or national funds)
 - Name and contact details of the National Contact Point for the promotion of sustainable aquaculture
 4. Best practices
 - Identification and presentation of 3 national best practices

Figure 4 - Scheme for the drafting of the multi-year national strategic plan for the promotion of sustainable aquaculture

2021 - Strategic guidelines for a more sustainable and competitive EU aquaculture for the period 2021 - 2030

In 2021, a new Communication from the Commission to the European Parliament entitled "*Strategic guidelines for a more sustainable and competitive EU aquaculture for the period 2021-2030*", produced the latest useful information to bring the aquaculture sector to a greater development.

The European Green Deal and the "Farm to Consumer" strategy underlined the great potential of farmed fish and shellfish products as source of low-carbon protein for human consumption and feed and as main means of building a sustainable food system. The aquaculture sector has been identified as the one that can help to decarbonise the economy, combat and mitigate climate change, reduce pollution, facilitate better conservation of ecosystems (in line with the objectives of the strategy on biodiversity and the 'zero pollution' goal for a toxic-free environment), as well as being part of a more circular management of resources.

Despite the progress made in recent years with the 2013 plan, the European aquaculture sector was still far from achieving its full potential in terms of growth and in relation to the growing demand for more sustainable fish products, including farmed fish. The EU imports over 70% of the seafood it consumes. Overall, aquaculture products account for 25% of fish consumption in the EU. EU aquaculture accounts for less than 2% of world production.

For this reason, the guidelines adopted in 2013, which formed the main pillar of the strategic coordination of EU aquaculture policy, need to be revised. Based on these guidelines, EU Member States have adopted **multiannual national strategic plans for aquaculture**. The implementation of these plans was supported by the exchange of good practices between Member States, facilitated by the Commission and by funding from the European Maritime and Fisheries Fund (EMFF) and other EU funds.

The guidelines of the 2021 Communication aim in particular to contribute to the creation of an EU aquaculture sector which:

- i) will be competitive and resilient;
- ii) will ensure the supply of nutritious and healthy food;
- iii) will reduce the EU's dependence on seafood imports;
- iv) will create economic opportunities and jobs;
- v) will be a global reference in terms of sustainability.

These guidelines should also help EU consumers to make informed choices about sustainable aquaculture products and ensure a level playing field for aquaculture products marketed in the EU compared to those from the rest of the world. Guidelines should also help in the use of tools and funds available to support aquaculture and support the implementation of EU legislation. To achieve this, challenges and opportunities of the European aquaculture sector will have to be addressed in order to achieve the following objectives:

- (1) to develop resilience and competitiveness;
- (2) to participate in the green transition;
- (3) to ensure social acceptance and consumer information;
- (4) to strengthen knowledge and innovation.

(1) Develop resilience and competitiveness

There are two basic conditions for the development of the EU aquaculture sector as a resilient and competitive sector: (1) **access to space and water** and (2) **a transparent and efficient regulatory and administrative framework**. The mid-term evaluation of the open method of coordination¹⁴ concluded that, despite the progress made in some Member States since the adoption of the 2013 strategic guidelines, further efforts are needed in both areas.

With regard to resilience, two issues pose a particular challenge in the aquaculture sector: the management of (3) **risks related to animal and human health** (in particular, but not exclusively, in shellfish farming) and (4) **the impact of climate changes**. Producer and market organization and product traceability (and controls on it) are also important tools to ensure the resilience and competitiveness of the EU aquaculture sector. Finally, the sector can also be made more competitive by diversifying EU production and adding value to aquaculture products.

(2) Participate in the green transition

Like many other sectors, aquaculture must also participate in the green transition established by the European Green Deal. Aquaculture plays a significant role both in the transition process towards sustainable food systems, both in the development of a circular economy, and in the reduction of biodiversity loss. All the more so as the EU is trying to make sustainability its trademark and this can offer the sector a significant economic opportunity, in particular due to the growing public attention to the environmental footprint of products and animal welfare.

Aquaculture requires good environmental conditions including good water quality. Consequently, the fight against pollution by the Member States, in line with the 'zero pollution' objective defined in the Green Deal, is of particular importance for aquaculture. If managed correctly, aquaculture can enable the production of proteins with a lower environmental and carbon footprint. Certain types of aquaculture such as shellfish farming, algae farming and the breeding of invertebrates can offer numerous ecosystem services. These services include: the absorption of excess nutrients and organic substances from the environment; the conservation and restoration of ecosystems and biodiversity through the creation of reefs where many marine species find refuge; the protection of the coasts from erosion thanks to the mitigation effect of the wave motion.

The Commission therefore invited Member States to review their multiannual national strategic plans taking into account the new orientations set out in the 2021 Communication.

The future European Maritime, Fisheries and Aquaculture Fund (EMFAF) will continue to provide support to Member States to help implement their multiannual national strategic plans.

(3) Ensure social acceptance and consumer information

The growth of EU aquaculture and its competitiveness is largely based on social acceptance and recognition of the benefits and value of EU aquaculture activities and products. Three factors are particularly important in gaining this acceptance:

- the communication on European aquaculture;
- the integration of EU aquaculture into local communities;
- the collection and monitoring of data.

An obstacle to the development and sale of products is often the negative perception that stakeholders have of aquaculture activities, in particular as regards their impact on the environment and other economic activities and as regards the antibiotics and feed used.

Conversely, the benefits of aquaculture such as creating jobs, being a low-carbon food source, providing ecosystem services and creating biodiversity points where many species find refuge are in largely unknown to the public.

Information is also essential to meet the growing consumer demand for sustainable products. In order for EU production to benefit from a high level of sustainability and rigorous quality standards, it is important to raise consumer awareness of these issues and the efforts made by the sector. This will help make EU aquaculture products more competitive and will also ensure a level playing field with other non-EU aquaculture products that may not offer an equivalent level of sustainability and quality.

It is therefore important to promote the use of quality labels and brands (subjected to adequate control), such as the Protected Designations of Origin (PDO), the Typical Geographical Indication (PGI) or the Organic (BIO) brand, which emphasize the aspects of sustainability and promotion and underline the value of EU aquaculture as a "local and fresh" production with a short supply chain.

(4) Increase of knowledge and innovation

Knowledge and innovation (including the use of digital technology) are key to achieving the objectives set for the EU aquaculture sector: developing the resilience and competitiveness of aquaculture and ensuring its green transition.

Universities, research centers and producers in the sector should collaborate more and more to modernize farming techniques, making it less impacting on the environment and also increasing the levels of well-being of farmed organisms. The results of the research and the successes obtained should be shared with the population and consumers.

THE PRODUCTION OF AQUACULTURE IN THE EUROPEAN UNION

While world production related to aquaculture quadrupled between 1990 and 2017, EU production remained stable for a long time at around 1.2 million tones. However, EU production figures have recently increased by around 24%, reaching a value of EUR 5.6 billion in 2017. Seafood made up 76% of this figure, crustaceans and shellfish 24%. EU aquaculture producers focused mainly on four species: mussels (24.5% of total volume), salmon (15%), trout (14%) and oysters (7%). In addition to these, there are other important farmed species such as sea bream, carp, sea bass and clam (Table 2). These data refer to 2019 and therefore still show the production value of the United Kingdom which currently no longer needs to be considered for EU total production.

Top 10 species in aquaculture in the European Union (2019) - volume in tons live weight and % of total		
Main commercial species	Volume	% Volume
Mediterranean mussel	335 236	24.53%
Atlantic salmon	203 810	14.91%
Rainbow trout	187 249	13.70%
Pacific cupped oyster	97 019	7.10%
Gilthead seabream	95 207	6.97%
European seabass	86 149	6.30%
Common carp	67 964	4.97%
Japanese carpet shell	28 336	2.07%
Atlantic bluefin tuna	22 434	1.64%

Table 2 - Main EU aquaculture species (2019) - Source: Eumofa - elaboration on Eurostat and FAO data

The main aquaculture producers among EU Member States are Spain (22%), UK (16%), France (14%), Italy (11%) and Greece (9%), which together account for around 72% of EU aquaculture production volume. However, in terms of production value, the UK is the largest producer (26%), followed by France (15%), Spain (13%), Greece (10%) and Italy (9%) (Table 43). Bivalve mollusks (mussels, oysters, clams) are dominant in Spain, France, Italy. The UK mainly produces salmon, while Greece mainly produces sea bass and sea bream.

Total aquaculture production per Member State (2019) (value in thousand EUR and % of total, volume in tons live weight and % of total)				
Country	Value	% Value	Volume	% volume
UK	1 308 220	26.24%	219 500	16.06%
FR	758 655	15.22%	194 335	14.22%
ES	633 106	12.70%	306 572	22.43%
EL	508 058	10.19%	128 748	9.42%
IT	453 156	9.09%	153 937	11.26%
MT	161 912	3.25%	13 823	1.01%
IE	157 663	3.16%	34 977	2.56%
DE	126 109	2.53%	41 077	3.01%
DK	124 464	2.50%	40 221	2.94%

Total aquaculture production per Member State (2019)				
(value in thousand EUR and % of total, volume in tons live weight and % of total)				
Country	Value	% Value	Volume	% volume
HR	120 687	2.42%	20 444	1.50%
PL	114 756	2.30%	42 627	3.12%
PT	90 328	1.81%	11 475	0.84%
NL	84 052	1.69%	46 340	3.39%
FI	62 370	1.25%	15 296	1.12%
CY	43 753	0.88%	8 079	0.59%
CZ	41 237	0.83%	20 989	1.54%
HU	35 985	0.72%	17 315	1.27%
SE	34 827	0.70%	11 497	0.84%
RO	31 871	0.64%	12 848	0.94%
BG	29 719	0.60%	11 963	0.88%
AT	29 596	0.59%	4 242	0.31%
LT	11 982	0.24%	3 776	0.28%
SK	7 278	0.15%	2 739	0.20%
EE	7 278	0.15%	1 062	0.08%
SI	6 093	0.12%	2 087	0.15%
LV	1 852	0.04%	628	0.05%
BE	538	0.01%	86	0.01%
Total EU-28	4 985 551	100%	1 366 682	100%

Table 3 - EU states aquaculture production (2019) - Source: Eumofa elaboration of Eurostat and FAO data

EU aquaculture accounts for around 20% of the fish and shellfish supply within the EU itself and directly employs around 70.000 people. The sector is made up of around 15.000 businesses, mainly small or micro businesses from coastal and rural areas.

World aquaculture production is very diversified both in terms of farmed species and production methods (marine cages, ponds, offshore, land recirculation aquaculture systems).

About 100 different species are currently farmed in aquaculture operations around the world. The value for world aquaculture is 120.104.313 (volume in tons of live weight). European aquaculture contributes only 2% to world aquaculture. (Table 4).

Total aquaculture production by other major producers (2019)				
(value in thousand EUR and % of total, volume in ton. live weight and % of total)				
Country	Value	% Value	Volume	% Volume
China	143 968 509	58.68%	68 423 859	56.97%
Indonesia	13 018 009	5.31%	15 893 400	13.23%
India	12 965 661	5.28%	7 800 300	6.49%
Vietnam	10 758 166	4.38%	4 455 557	3.71%
Chile	9 788 299	3.99%	1 407 286	1.17%
Norway	7 281 989	2.97%	1 453 042	1.21%
Bangladesh	5 403 903	2.20%	2 488 600	2.07%
EU-28	4 985 551	2.03%	1 366 682	1.14%
Japan	4 599 929	1.87%	943 748	0.79%
Thailand	2 857 667	1.16%	964 266	0.80%

Total aquaculture production by other major producers (2019) (value in thousand EUR and % of total, volume in ton. live weight and % of total)				
Country	Value	% Value	Volume	% Volume
Egypt	2 556 831	1.04%	1 641 949	1.37%
South Korea	2 493 821	1.02%	2 406 351	2.00%
Ecuador	2 323 907	0.95%	695 835	0.58%
Philippines	2 032 010	0.83%	2 358 238	1.96%
Iran	1 645 936	0.67%	505 000	0.42%
Myanmar	1 645 752	0.67%	1 082 153	0.90%
Others	17 019 608	6.94%	6 218 046	5.18%
Total	245 345 548	100%	120 104 313	100%

Table 4 - World Countries aquaculture production (2019) - Source: Eumofa elaboration of Eurostat and FAO data

In the EU (Figure 6):

- 46% of aquaculture production consists of mollusks and crustaceans;
- 29% of aquaculture production consists of Salmonids;
- 17% of aquaculture production is made up of marine fish;
- 8% of aquaculture production is made up of freshwater fish.

Despite the diversity of aquaculture, EU aquaculture production is largely concentrated on a few species, the most important being mussels, salmon, sea bream, rainbow trout, sea bass, oysters and carp. Seaweed production is still limited in the EU but is increasing.

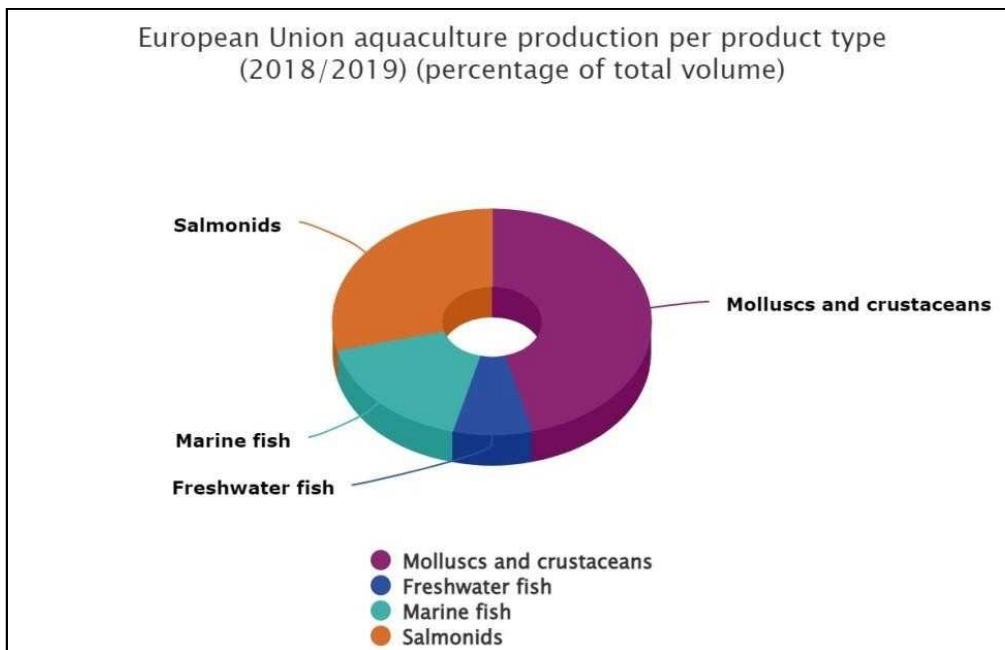


Figure 5 - EU aquaculture production (2018-19): 46% Mollusks/crustacean; 29% Salmonids; 17% Marine fish; 8% Freshwater fish

THE INTEGRATED MARITIME POLICY OF THE EUROPEAN UNION

In October 2007, the European Union adopted an integrated maritime policy. At the basis of this radical transformation in the way of conceiving one's maritime development was an observation: the Union is certainly the first maritime power on the planet, but the way in which it exploits the sea is by no means optimal.

With the exhaustion of fishery resources, pollution, eutrophication, invasive species and other common related problems, space conflicts between economic actors have multiplied, and so on. It was therefore necessary to put an end to this situation, in order to ensure a future - and above all a sustainable future - for the European maritime sectors. The fundamental problem had been identified for a long time now: a management of maritime affairs divided into watertight compartments. Fishing, tourism, transport, shipbuilding, environment, defense, urban planning, security: all these sectors operated without taking into account each other. However they interact constantly, and every decision made within one can have repercussions on the others. It was therefore necessary to develop a common vision of the development of maritime activities and insert it into a logic of sustainable development. Thus, in 2006, the European Commission mentioned for the first time the possibility of launching a genuine integrated maritime policy. In the wake of the publication of its Green Paper on the Union's future maritime policy, the Commission consulted maritime actors in a process that lasted more than a year, and then drafted the Blue Book, "An integrated maritime policy for the European Union", accompanying it with a detailed action plan, which described the implementation of this policy point by point.

Indeed, from the outset, Parliament has actively supported the various initiatives aimed at defining the Union's integrated maritime policy. On 12 July 2007, in response to the Commission's Green Paper on a future maritime policy, the European Parliament adopted a resolution supporting the integrated approach to maritime policy.

Following the official launch of the Union IMP, Parliament adopted several resolutions on an integrated maritime policy for the EU, in response to several Commission communications on the subject. On 30 November 2011, the European Parliament and the Council adopted Regulation (EU) No. 1255/2011, establishing a support program for the further development of an integrated maritime policy. This regulation is no longer in force and was repealed during the last reform of the CFP with the adoption of Regulation (EU) no. 508/2014 relating to the European Maritime and Fisheries Fund.

On 2 July 2013, Parliament passed a resolution on blue growth. The resolution aims to revive and support the SME, while underlining that the 'blue growth' strategy, as an element of the SME, will foster the development of synergies and coordinated policies, thus creating European added value.

With regard to governance, for example, numerous national and transnational institutions have organized themselves to facilitate maritime integration. At European level, the Commission has set an example: the Commissioners concerned have formed a steering

group, which meets annually to harmonize their policy projects. At the administrative level, this translates into the formation of an inter-service group that brings together 28 Directorates General and constantly monitors the progress of maritime integration.

The Commission had planned the development of three tools intended to facilitate the management and decision-making processes of the integrated maritime policy:

- Marine spatial planning to frame and guide the development of maritime activities. The increased human impact on the oceans, coupled with the rapid growth of demand and competition for maritime space for different purposes, such as fisheries, offshore installations for renewable energy and the conservation of ecosystems, have highlighted the urgent need for integrated ocean management. The Parliament and the Council therefore adopted Directive 2014/89/EU establishing a framework for maritime spatial planning (MIP). It aims to promote the sustainable growth of maritime economies and the use of marine resources through better conflict management and greater synergy between different maritime activities.
- Effective maritime surveillance that protects sea users from natural and human hazards. Integrated maritime surveillance aims to provide common ways of sharing information and data between authorities involved in different aspects of surveillance, such as border control, marine pollution and marine environment, fisheries control, general application of the law and defense.
- A European database for observation and data collection on the marine environment, which offers precise scientific and statistical data to those responsible for decision-making, economic and political processes. Maritime planning has formed the subject of a roadmap that sets out the ten fundamental principles of maritime planning, the implementation of which is the responsibility of the Member States, several of which have already started it. Germany, Spain, Belgium and the Netherlands, in particular, have launched a plan for at least partial use of their exclusive economic zone. The European Marine Observation and Data Network (EMODnet) produces hydrographic, geological, chemical and biological data on selected sea basins, on the basis of which a mapping of marine habitats and high-resolution cartography has been created.

Precisely in order to reconcile the different needs of the Member States and resolve any critical issues, the internal decrees of the Member States have worked on the methods of implementation of the Cooperation between Member States and cross-border third Countries for the coordination of their respective maritime territorial planning actions.

Cooperation with the Member States with which sea basins are shared, for example, is aimed, in fact, at ensuring the coherence and coordination of the respective management plans of the maritime space of the region or marine sub-region itself and takes into account, in particular, aspects of a transnational nature and is implemented through existing regional institutional cooperation structures.

At the cross-border level, the transposition directives required Member States sharing a sea basin to cooperate in order to ensure that their maritime spatial management plans are coherent and coordinated with each other, including with regard to the entire marine region in which the pelvis predicted. The cooperation in question was to take place through the existing regional institutional cooperation structures and/or the networks or structures of the competent authorities of the individual Member States.

Similarly, with reference to sea basins shared with third Countries, Member States must work towards cooperation in their respective actions on maritime spatial planning in the relevant maritime regions, in accordance with international law and using existing international fora and forms of regional institutional cooperation.

The Italian situation

In Italy, the main issues that must be addressed in the planning process of the maritime space of Italian interest, having regard to the transboundary coordination aspects, concern, within the "Mediterranean Sea" marine region, the following marine sub-regions: - "Adriatic Sea", where the limited extension of the maritime spaces in question (about 132,000 km²) in relation to the multiple current and future uses and the number of state actors with whom it is necessary to deal (5 States, of which 2 EU members - Slovenia and Croatia - and 3 third Countries - Bosnia, Montenegro and Albania), will require a particularly intense cooperation effort, as evidenced by the already existing institutional forum for comparison and connection for the policies of the area represented by the EUSAIR (EU strategy for Adriatic and Ionian Region); - "Ionian Sea and Central Mediterranean", where the greatest criticalities are determined by the fact that the cooperation relations with third Countries on the North African shore are affected by the well-known political problems and instabilities affecting the area in question (think, for example, the effects that political instability and tensions deriving from the crisis affecting the area reflect on the issues of energy exploitation and traffic routes). Finally, in the light of the above, a common approach would offer MS applying MSP an opportunity to share knowledge with others.

THE COMMON ORGANIZATION OF MARKETS RELATED TO FISHING AND AQUACULTURE PRODUCTS

The Common Markets Organization (CMO) has been one of the pillars of the CFP and has been an integral part of its Policy since 1970 when the institution set itself the goal of creating a common market within the Community for fishing, with consequent adjustment of production to demand for the benefit of producers and consumers. Starting from Reg. (CE) n. 3759/92 of the Council, the CMO and is divided into 4 essential points:

- common standards for the marketing of fresh products concerning the quality, classification, packaging and labeling of Community and imported fish products;
- producer organizations (POs); POs are made up of fishers or aquaculture producers who join freely to take measures to ensure the best marketing conditions for their products. Membership in POs is voluntary; however, members must comply with production and marketing rules. They contribute in this way to the objectives of the common organization of the markets. The main advantage of these organizations, which are now more than 1800, is to allow the producers themselves to adjust production to market demand;
- a price support system which fixes the minimum amounts below which fish products cannot be sold. POs can receive financial compensation if they have to withdraw products from the market and freeze or process them;
- rules governing trade with third Countries in order to enforce the needs of the EU market, the interests of Community fishermen and the rules of fair competition.

Subsequently the matter was expanded with the Reg. (CE) n. 2406/96 which established common marketing standards for some fishery products, and with Reg. (EC) no. 104/2000 "Basic Regulation on the Common Organization of Markets in the fishery and aquaculture products sector", with which the Council adopted the reform of the CMO in the fishery and aquaculture products sector. The new rules are the response to the profound changes that have taken place in the Community markets for fishery and aquaculture products in recent years due to various factors such as the overexploitation of fish stocks, new consumption trends, market globalization and the strong dependence of the EU from imports, both for fresh produce and raw materials for processing.

In 2013, the CMO was reformed again as part of the latest CFP reform package, taking into account some shortcomings of the previous frameworks and the evolution of fisheries and aquaculture activities. It entered into force on 10 January 2014. The current regulation - reg. (EU) no. 1379/2013 on the common organization of the markets in the fishery and aquaculture products sector - is assuming a more integrated role, linking market considerations to management strategies.

The objective of the common organization of the markets governed by Community Regulation (EC) no. 1379/2013 and subsequent amendments is therefore:

- stabilize the market for fishery products in a sustainable way in terms of price, quality, regularity and availability;
- make it more attractive through qualitatively updated products (marketing standards);
- make it more transparent through better consumer information (labeling);
- and to incorporate it into responsible fishing.

In the last round of reform of the CFP, Parliament played an important role in defining the current CMO. He was strongly in favor of its review, so as to create a legal framework for a thriving sector, with income support, greater market stability, high marketing standards and greater added value of fishery and aquaculture products. On 29 May 2018, Parliament adopted a resolution on optimizing the value chain in the EU fisheries sector. Parliament called on the Commission, Member States and regional authorities to take a range of actions to address the complex challenges of the EU fisheries sector, for example by facilitating the creation of POs, making small-scale fishing possible and including the gender approach in fisheries policies. Together with the subsequent adoption of the reformed basic regulation on the Common Fisheries Policy (CFP), and the new European Maritime and Fisheries Fund (EMFF), the CMO regime is one of the cornerstones of the recent reform of the sector of European fisheries. By the end of 2022, the Commission must present an assessment report on the outcome of the implementation of the CMO regulation, especially in the light of the vulnerabilities acquired by the post-fishing sector.

Effects of the Covid-19 epidemic

The COVID-19 pandemic has so far had a strong impact on the market dynamics of both fishery and aquaculture products, albeit to varying degrees. As for the fisheries sector, small pelagic have been negligibly affected by the pandemic, as they are mainly processed into frozen products, and their market prices are still relatively low. Conversely, fishing for fresh-sold species has suffered a significant backlash. As for the aquaculture industry, market players targeting the retail sector did not experience major losses in the first half of 2020, while operators traditionally targeting the HoReCa segment suffered the most. The processing sector has had to face the challenge of adopting new security measures to avoid COVID-19 infections among its workers. Within the processing sector, producers of non-rapidly perishable products destined for retail sale achieved the best performance during the pandemic. Reducing export opportunities has been a challenge for both the aquaculture and fisheries sectors. Indeed, in the absence of strong demand in export markets, the products were sold on the EU market at lower prices. Operators have made enormous efforts to adapt to the new market dynamics, and many have succeeded. However, it appears that the fishing and aquaculture industry will have to live with the uncertainties stemming from the pandemic for yet another time.

On the other hand, analyzing the pre-pandemic data of 2019, we realize how the EU trade flows of fishery and aquaculture products, which include both imports and exports between

the EU and third Countries, had reached a total of 33 , 37 billion euros and 8.55 million tons, making it the second largest commercial player in the world after China. Imports represented about 80% of the total, with 27,21 billion euros and 6,34 million tons.

CHAPTER 2: FISHERIES

ITALIAN LEGISLATION ON FISHERIES

The fishing activity is regulated in Italy by Legislative Decree 9 January 2012, n. 4 “Measures for the reorganization of the legislation on fisheries and aquaculture, pursuant to article 28 of the law of 4 June 2010”.

The Legislative Decree 4/2012 then regulated fishing and aquaculture activities and the sanctioning system. Professional fishing (Art. 2) is defined as the organized economic activity carried out in marine or brackish or freshwater environments, aimed at the search for living aquatic organisms, the hauling, laying, towing and recovery of a fishing gear, transfer on board of catches, transshipment, storage on board, processing on board, transfer, caging, fattening and landing of fish and fishery products. The activities related to professional fishing are those related to fishing tourism, hospitality, recreational, educational, cultural and service activities, aimed at the correct use of aquatic ecosystems and fishing resources and the enhancement of the socio-cultural aspects of fish companies, the transformation, distribution and marketing of fishery products, as well as the promotion and enhancement actions, and finally the active management interventions, aimed at productive enhancement, the sustainable use of aquatic ecosystems and the protection of the coastal environment. The aquaculture activity is defined - without prejudice to the provisions of article 2135 of the civil code - as an “economic activity, carried out professionally, aimed at the breeding or culture of aquatic organisms, through the care and development of a biological cycle carried out in fresh, brackish or marine waters”. Activities related to it consist of the manipulation, conservation, transformation, marketing of its products, the supply of goods or services through the prevalent use of the company's equipment or resources normally employed in the aquaculture activity exercised, and finally the interventions of active management aimed at the productive enhancement and sustainable use of aquatic ecosystems and the coastal environment. Article 4 defines the fish entrepreneur as the holder of a fishing license who professionally carries out the professional fishing activity; the provisions concerning the agricultural entrepreneur apply to it. The fish farmer is considered a fish entrepreneur, while the young fish entrepreneur (art. 5) is the one who carries out the activities of the fish entrepreneur with an age not exceeding 40 years. In the decree in question there is also the definition of “non-professional fishing” (art. 6), directed for recreational, tourist, sporting or scientific purposes, borrowed from art. 4 of Reg. (EC) 1224/2009, as well as the “scientific fishing”, such as direct activity for the purpose of study, research and experimentation. Finally, the discipline of sport fishing is delegated to a

and traceability; obstructing the activities of fisheries inspectors and supervisory bodies or carrying out transshipment with vessels caught in illegal fishing activities.

The administrative pecuniary sanctions, in the most serious cases, can reach 150 thousand euros (in particular, where the violations concern Bluefin tuna and Swordfish), while the ancillary sanctions may consist to: fish and gears confiscation; obligation to restore the state of the places; suspension of the license for up to 6 months; revocation of the license in certain cases of recidivism (art. 11, 12).

With the reform of Title V of the Italian Constitution, legislative competences in the field of aquaculture have been attributed exclusively to the Regions, while the State is responsible for national planning and coordination of regional policies. The shift of functions and tasks at regional level also concerns the administrative and bureaucratic requirements relating to strategic issues for the development of aquaculture, such as: the licensing regime for the issuance of state concessions; renewals; extensions and other authorization requirements.

At central level, the **Ministry of Agriculture, Food Sovereignty and Forestry (MASAF)** is the Authority in charge to manage fisheries and aquaculture policies. Responsibilities on fisheries and aquaculture lie with the Directorate General for Maritime Fisheries and Aquaculture (DG PEMAC). Other MASAF Departments have specific skills in the field of competitive policies and agri-food quality also for aspects related to fishery and aquaculture products. The Ministry of the Environment and Energy Security (MASE) has responsibilities for everything concerning the interactions between aquaculture and environment, marine protected areas, Natura 2000 sites, resource conservation, biodiversity, environmental impact assessment and application of the European environmental regulations and environmental training.

Structure of the Italian fisheries

Art. 9 of the Presidential Decree 2 October 1968, n. 1639 with reference to the fishing vessels indicated in art. 8, and to the fishing categories provided for by art. 220 of the Navigation Code and art. 408 of the Regulation for maritime navigation, identifies the "types of professional fishing" whose exercise falls within the scope of the Regulation itself. In particular, professional fishing stands out in fishing:

1. Oceanic fishing(= beyond the straits)
2. Mediterranean fishing (= deep sea)
3. Coastal fishing

As for **coastal fishing**, art. 9 in comment points out that it is divided into:

- a) Local fishing
- b) Close fishing

The following art. 10 identifies another type of professional fishing, that which is carried out "in facilities intended for the capture of migratory species", "fish farming" and, more generally, "aquaculture".

The "oceanic" or large-scale fishing is carried out beyond the straits, with first-class vessels. The "deep sea fishing" is carried out in the waters of the Mediterranean Sea, with fishing vessels of not less than the second category (not less than 30 GRT and with the required safety equipment).

Coastal fishing is divided into:

Local fishing: carried out in maritime waters or from land or with vessels of 30 GRT up to a maximum distance of "six miles" from the coast. With particular additional equipment, if the ship complies with the safety requirements for vessels authorized for local coastal fishing (M.D. 22/06/82), an authorization (renewable upon expiry) can be requested for the exercise of the activity up to a distance of 12 miles from the coast (M.D. 19/04/2000);

Close fishing: it is practiced in sea waters up to a maximum distance of "forty miles" from the coast and in all national waters, with fishing vessels of category no lower than the third (art. 2, paragraph 1 of Legislative Decree 30/09/94 n. 561, converted into law with Law 30 November 1994 n. 655), equipped with more equipment for catching and preserving fish.

Statistics on fisheries in Italy

Fisheries data are collected within the EU Data Collection Framework (DCF). vessellItaly is the second largest European fishing fleet: 12.200 larger units and 8.000 small-scale fishing vessels. About 30.000 seafarers engaged directly in the sector, 100.000 if we also consider those who work ashore. A total of around 500.000 workers.

Italian fisheries is characterized by a downward trend in landings (both in terms of weight and value). The total weight caught by the Italian fleet in 2019 amounted to approximately 174.000 tons, with a value of 887 million euros. From 2010 to today, the total value of landings has decreased by 15,7%, the volume of landed productions by 16,2% and the average price by 9% (€/Kg).

To date, our Country's Fishing System can count on 12.063 fishing vessels equal to 17% of the EU fleet (74.996 units), 18% in terms of engine power and 11% in terms of capacity (source: Fleet Register European Commission https://webgate.ec.europa.eu/fleet-europa/stat_glimpse_it) and 25.095 employed.

The average age of our fleet is 31 years. The average number of people on board per fishing unit is stable over time, with approximately 2,16 people employed per trawler. If we analyze the division of the sector both as companies (fishing vessels) and as a workforce, the following data emerge: about 19% of the total vessels are trawlers; about 28,9% of the total number of passengers are present in the trawling sector.

Finally, if we look at the two most industrial segments (trawling, pair trawling, purse seine), they make up the main fleet, representing about 60% of the total Italian gross active tonnage. Over the last decade, earnings from landings have decreased by more than 30%. This significant reduction in earnings was only partially offset by a 26% reduction in operating

costs (€ 644 million), mainly due to the reduction in labor costs (-20% as a result of the aforementioned job losses) and the cost of energy (-27% after the first post 2007/08 crisis). The reduction of all the indicators is a direct consequence of the strong downsizing of the production structure which, as previously reported, has led to a substantial decline in the fleet and in the number of employees.

There is an evident and constant contraction in the size of the fleet, which goes from 14.873 vessels in 2004 to 11.984 in 2019, thus recording an overall decrease close to 2,900 fishing vessels. This significant decline (-19.4%) mainly involved vessels with above-average dimensions. In fact, the total GT decreased by 27,4%, and the total kW by 23.4% (Tab. 7). Due to this, the fleet's average GT dropped from 13,5 to 11,6 GT.

The process of strong downsizing of the production structure is due to the measures envisaged by the Common Fisheries Policy, which supported and encouraged the spontaneous exit of fishing vessels, through specific definitive arrest measures. The trend of the structural variables of the fleet in 2019 is shown in the following table.

Anno	Numero battelli	GT	kW
2004	14 873	200 561	1 212 532
2019	11 984	145 678	929 144
Variazione %	-19.4%	-27.4%	-23.4%

Table 5- Trend of the structural variables of the fleet in 2004 and 2019

In recent years, the numerical reduction of the fleet has continued with very slight intensity. From 2004 to 2012 there was a decrease of 15% points, while from 2013 to 2019 the trend was reduced, and “only” 5% of the vessels left the fleet (Fig. 7).

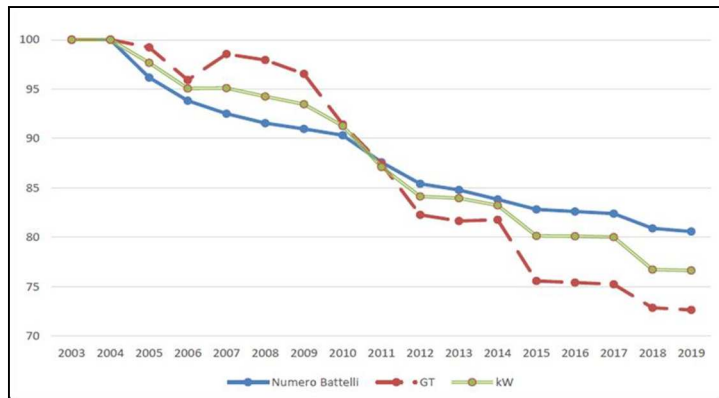


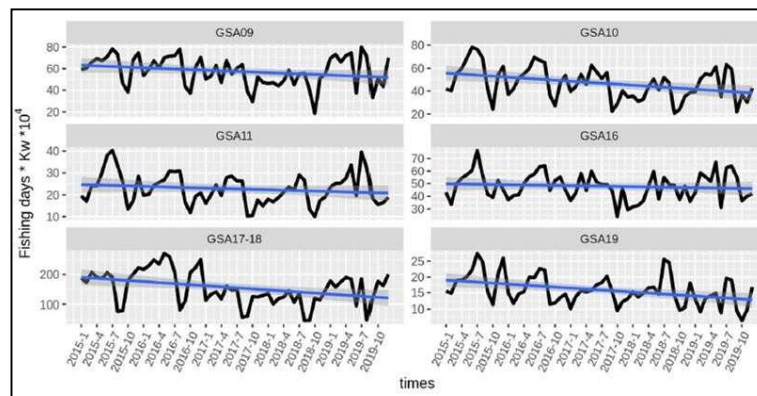
Figure 6 - Trend of the fishing fleet from 2004 to 2019. source MASAF

As well as the fishing capacity, the number of days at sea of the Italian fishing fleet also decreased in 2019, compared to the previous year (-10%). Although with a different percentage incidence, this reduction affected all GSAs.

GSA	2018	2019	Differenza	Differenza %
9	177 873	150 467	- 27 405	-15%
10	294 537	258 953	- 35 584	-12%
11	138 105	122 054	- 16 051	-12%
16	142 566	137 021	- 5 545	-4%
19	211 815	189 021	- 22 794	-11%
17/18	411 830	385 796	- 26 035	-6%
Totale	1 376 727	1 243 313	- 133 414	-10%

Table 6 - Reduction of fishing days from 2018 to 2019 in the Mediterranean GSA

By analyzing the **Vessel monitoring system (VMS)** data, it is possible to obtain the days of activity of the fleet equipped with this tracking system and, by crossing the activity data with those of engine power, it is possible to obtain estimates of effort in Number of Fishing Days*kW. Studying the trend of the trawling effort in the period 2015 - 2019 (the blue line of the graph below represents the linear trend of the data), a progressive decrease is evident with evident long-term effects. This decrease was accentuated by the strategies to further reduce the days of activity implemented in 2019.



Graph 1 - Trend of the trawling effort in the period 2015-2019

The 2022 Annual Economic Report on the EU Fishing Fleet. ITALY

The STECF annual report shows the first analyzed data of the pre and post Covid year in the Italian fish sector. In 2020, the fleet spent a total of approximately 990 million days at sea (DaS). The effort, in DaS, decreased by 21% compared to 2019 and by 38% between 2008 and 2020. In 2020, the average days at sea per vessel were 97, the lowest level since 2008, or 16% in less than the value recorded in 2019. Although the reduction of fishing effort for DTS fleet segments was partially expected due to the entry into force of the National Management Plans for demersal fisheries and the EU Multiannual Management Plan for the Western Mediterranean, the main factor reducing fishing days for trawlers and other segments of the fleet was the outbreak of the COVID-19 pandemic. In 2020, the total volume of products landed decreased by 24% compared to the previous year. Total income decreased between 2019 and 2020 due to the sharp reduction in fishing activity and therefore landings.

The two main variable costs are labor and energy. In 2020, labor costs were €212 million, while energy costs were €123 million. Labor costs decreased by 18% from 2019 to 2020 due to the predominance of the equity contract in the Italian labor system, where wages are linked to income from landings. Energy costs decreased by 32% due to the reduction in the number of days at sea.

In terms of economic performance of the fleet, the GVA, gross profit and net profit generated by the domestic fleet in 2020 were EUR 422 million, EUR 210 million and EUR 55 million respectively. Compared to 2019, these values resulted in decreases of 25%, 31% and 61% respectively.

In 2020, the replacement value (depreciation) of the Italian fleet was estimated at €570 million, around 5% less than estimated in the previous year.

The negative development of the economic indicators in 2020 is mainly due to the LSF, while the SSCF maintained approximately the same values recorded in 2019. The LSF was characterized by an increasing profitability trend until 2017, a slight decline in 2018 and 2019, and a sharp reduction in 2020.

The most important operating costs are the wages and salaries of crew members and fuel costs. Fuel costs are the main cost item especially for the fleet of trawlers; fuel prices were at their lowest level since 2014; nevertheless, the reduction in energy costs does not compensate for the negative trend in revenues. Annual wages and salaries decreased (-18%); the reduction is to be connected to the negative trend in revenues; labor costs are directly related to revenues as the traditional income sharing system between the owner and the crew is the most widespread. For some fishing segments (e.g. DTS1218, DTS1824, PS1218 and PS1824 and PGP), crew wage per employee decreased sharply in 2020 due to long downtime earlier in the year. To mitigate the impact of COVID-19, a daily allowance was paid to fishermen whose vessels were not working (wage guarantee fund). The allowance was for fishermen, including the self-employed and the owner on board.

Overall, 2022 is projected to be less profitable than 2021 due to rising energy costs (tripling from 2020). For 2022, the model predicts a 35% decrease in gross value added and 81% in gross profit compared to 2021. GVA is estimated to reach EUR 239 million, gross profit EUR 31 million ; for 2022, a net loss of 89 million euros is estimated.

Energy costs represent a significant component of the operating costs of fishing fleets and, consequently, the profitability of fishing fleets is very sensitive to changes in fuel prices. The crisis has affected all segments of the Italian fleet, although the pelagic fleet and trawlers are the most vulnerable segments of the fleet. Fishermen have reacted by reducing the days spent at sea or by stopping their activity. To mitigate the impact of fuel costs, financial compensation has been provided to vessel owners (a one-off contribution depending on vessel size). The crew is facing a huge social and economic crisis. Long periods of inactivity have a direct impact on wages. The fishermen complain about the absence of social safety nets.

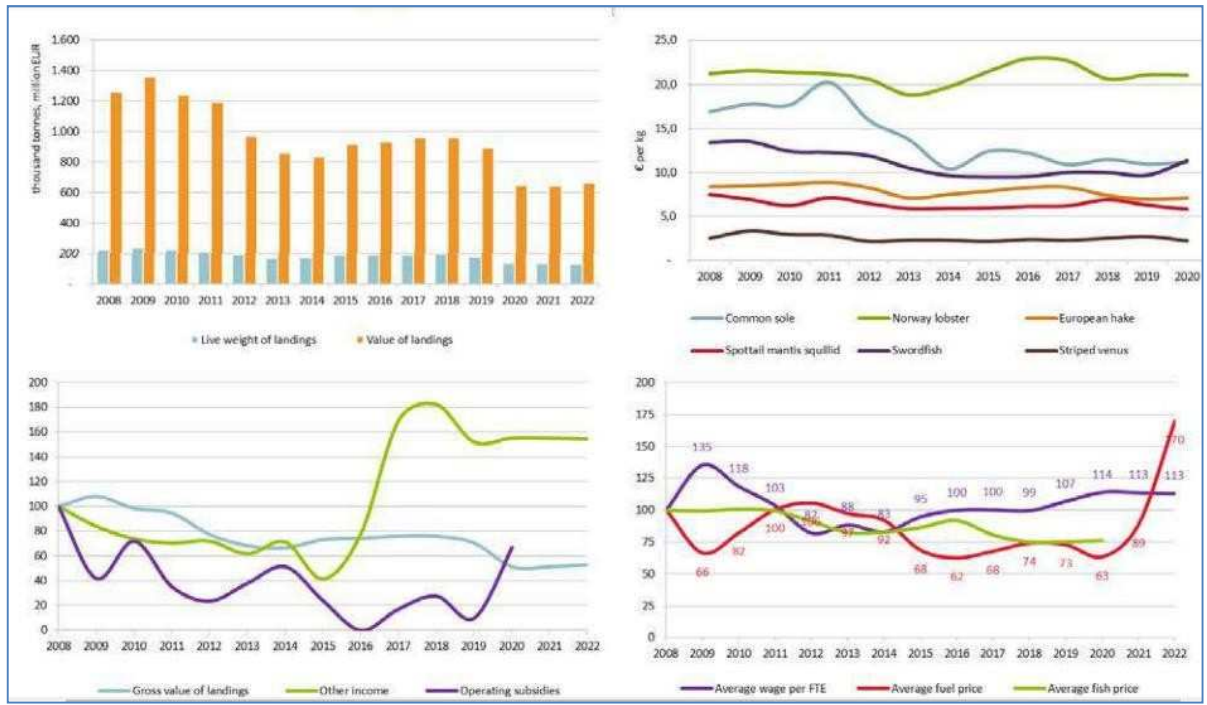


Figure 7 - Economic performance indicators (absolute value and relative values); cost structure and changes in the main cost items. Source The 2022 Annual Economic Report on the EU Fishing Fleet (STECF 22-06)

APPLICATION AND IMPLEMENTATION OF EUROPEAN LEGISLATION IN ITALY

Italy is located in the center of the Mediterranean and for this reason it is characterized by a variety of marine ecosystems that require different management measures. In general, the management measures applied to date have provided for a reduction in days at sea for the trawl fleet, regardless of the reference GSA. In fact, since 2019, the western Mediterranean (GSA 9-10-11) regulates this fishing activity through Regulation 1022/2019, which initially provided for a reduction in effort days, but from 2021 provides for the allocation of quotas for deep shrimp. Instead, the management measures relating to the Adriatic Sea, the Ionian Sea and the Strait of Sicily are discussed at the level of the GFCM and subsequently transposed into EU legislation. This mechanism is essential for the definition of joint management measures with Third Countries. In general, in this context, the measures envisaged a reduction in days at sea and, recently, quotas for some species as deep water shrimps. The mechanism of reduction of the day as sea is not always welcomed by the Italian fishery sector, who have been suffering a constant reduction in working days for years now, further aggravated by the COVID-19 pandemic and the recent conflict in Ukraine. The dialogue in these international forums is aimed at achieving a balance between the need to exploit fish resources in a sustainable way and the needs of the productive sector. The excellent measures put in place in favor of the sector by the 2014-2020 EMFF Program, have highlighted the potential and the difficulties of a sector that still struggles to accept change and long-term planning. Reason why Italy finds itself in a context in which, on the one hand it is investing in strategic sectors such as transformation, product certification, short supply chain, sustainable tourism, and is therefore in step with European standards, on the other hand, there are entrepreneurs along the coasts who slow down their competitiveness processes by not intervening decisively on their capital, and who therefore find themselves in a clear stalemate.

CROATIAN LEGISLATION ON FISHERIES

The territory of the Republic of Croatia comprises more than 1.200 islands. As a result, its coastline has an approximate length of 5.800 km, which represents almost 9% of the entire Mediterranean coast.

With a sea area of 31.067 km², 1.242 islands, islets and reefs, for a total of 6.278 km of coastline, Croatia has a long tradition in fishing that provides a source of income over the years for coastal communities. and insular. In addition to being a source of healthy food supply, fishing adds value to vibrant coastal tourism.

Marine and freshwater fishing is important for the Croatian economy.

Croatia's fishing fleet register includes 7.455 vessels in 2019. Croatia's catch fishery production in 2019 was just over 64.500 tons, of which only 562 in inland waters. A total of 7.900 people were directly involved in sea and freshwater fishing in 2019. Fishing and aquaculture accounted for almost 0,29% of GDP (Source FAO).

Role of fisheries in the national economy

Estimates of the direct share of fisheries in gross domestic product (GDP) vary between 0,2% and 0,7%. The coastal community and the islands are highly dependent on the fishing industry, while fishing, especially fish farming, has been strongly linked to the development of rural tourism. However, the contribution of fisheries must be analyzed taking into account the share of GDP of all activities in some way linked to the sector.

In addition to the direct production value of the capture fishery, fish farming and processing sector, the assessment of the share of fisheries in GDP should also include the construction and maintenance of vessels, the production of fishing gear and equipment, transport, storage and related logistics, port activities related to fishing and to some extent some forms of tourism. Furthermore, assessments of the importance of the fisheries sector in general should include the element of supplying high quality fresh food, a contribution to the positive balance of external trade and the importance of employment on the coast and in the islands, where fishing is one of the rare activities that provide a source of income throughout the year. However, it is believed that the real contribution of the sectors is underestimated and that, if the value of accompanying activities is included, the contribution to national GDP exceeds 1%. Inland commercial fishing in Croatia has low economic value and little impact on the economy.

Market

Fishing is an important element of the overall export of agricultural products for Croatia, accounting for about 7% of the total export value of agricultural products. Croatia has an export value of nearly € 200 million. By far, the main trading partner is Italy, where Croatia traditionally exports canned anchovies.

In recent years, increasing quantities of sea bass and sea bream have been exported to Italy by the Croatian aquaculture industry.

Italy accounts for over 30% of Croatian exports in terms of value. The second important partner for Croatian exports of fishery products is Japan, where high-value Bluefin tuna is exported. Slovenia and Spain are also great importers of Croatian fishery products. The value of fish imports is € 150 million/per year.

The main imported products in terms of value were frozen squid, used in the tourism industry for the preparation of fried squid rings. Canned tuna and fresh anchovies also play a role in fish imports. Spain and Italy are the main suppliers of edible fish products for the Croatian market.

Employment

Fishing creates jobs, especially on the coast and in the islands. Furthermore, fishing is closely linked to the development of coastal tourism. Data on the number of employees in

the sector are currently being estimated, including data on vessels and trade registers, data on the number of crew members and the number of licenses (vessels) in Croatia's fishing fleet, as well as fish farm register data. It is estimated that around 14.000 people (fishers, employees of companies involved in catching, breeding, and processing fisheries) are employed directly in the sector. In addition to permanent employees, there are a significant number of seasonal workers, especially in the segment of those employed on fishing vessels. It is estimated that around 25.000 people are involved in the sector, directly and indirectly.

Institutional framework

In an administrative sense, MINAGRI is the competent authority for all matters relating to fisheries. The organizational unit within MINAGRI directly responsible for these matters is the Directorate of Fisheries (DoF). DoF is responsible to carry out all the administrative tasks in fishing area (fleet and resource management), freshwater fishing, aquaculture (sea and freshwater), structural measures (as managing authority), market policy and fisheries inspections. In addition to the central office in Zagreb, the DoF has seven field offices that carry out technical and administrative tasks. The MINAGRI-DoF aims to establish a sustainable management system for resources and for the fishing sector in general.

Legal framework

The Country recently passed three fisheries and aquaculture laws. The law on sea fishing (2017) regulates the effective implementation of the European Union's Common Fisheries Policy and closely defines and determines the relationships, tasks and powers of the various competent bodies: issues of monitoring, additional and inspection control and rules which governing reporting to the European Commission. The law also establishes, at national level, the objectives of the fisheries policy, the management and protection of marine biological resources, the concrete provisions on fisheries, the various issues relating to data collection, participation in the work of international organizations in the fisheries sector and/or international projects contributing to the achievement of the objectives of the fisheries policy at national level (all relevant for sea fishing in the territory of the Republic of Croatia). The 2017 Aquaculture Act governs the implementation of the EU's Common Fisheries Policy in the area of aquaculture. This law further defines the national aquaculture development objectives, the modalities and conditions for carrying out aquaculture activities, the competent bodies for aquaculture and market functions, the inspection and monitoring arrangements, as well as other related matters. to aquaculture. This text is divided into 48 articles. The main topics covered are the following: strategic importance of aquaculture; competent bodies; institutional support; conditions for carrying out aquaculture activities; permits and licenses, related charges and administrative problems; public tenders for the

award of a concession and public tenders for the award of fish ponds; use of foreign and locally invisible species in aquaculture; use of native and strictly protected species in aquaculture; ecological production in aquaculture; professional qualification for carrying out aquaculture activities; aquaculture vessels; international cooperation in the aquaculture sector; collection of data and statistics on aquaculture; market in the aquaculture sector; various inspection issues and sanctioning provisions.

The 2019 Freshwater Fisheries Act governs the rational and sustainable management of inland fisheries. This type of approach is based on scientific and professional knowledge in the field of internal ichthyology and ecology and on specific rules to be implemented and observed, with the participation of the competent authorities and the execution of their tasks and duties. This law establishes the conditions and detailed procedures for the exercise of freshwater or inland fishing on the territory of the Republic of Croatia; for the monitoring of catches through the relative traceability on the market, also in accordance with the Common Fisheries Policy of the European Union; data collection, surveillance and inspection; implementation of the sanctioning provisions.

Structure of the regulation on fisheries

Adopted by the Croatian parliament at its session of 19 June 2017, the new legal framework on fisheries determines in the first place the implementation of the European Union's CFP by entrusting the competent authorities with their tasks, supervision and control, including the methods of management and reporting to the European Commission and infringement provisions.

In the second part, this law establishes the objectives of the fisheries policy, the method of management and protection of the renewable biological resources of the sea, the method and conditions of fishing, data collection and processing, management of the fishing fleet, competent authorities for the implementation support for fisheries and market regulation, as well as other issues relating to the fishery sector.

In the third part it also prescribes provisions relating to participation in the work of international fisheries organizations and/or international projects that contribute to the achievement of the objectives of the fisheries policy at national level.

In Article 2 we already find principles of confirmation on how the CFP filters into national legislation assuming its legal predominance in the implementation phase:

- Regulation (EU) no. 1380/2013 of the European Parliament and of the Council of 11 December 2013 on fisheries policy;
- Regulation (EC) no. 1967/2006 of 21 December 2006 on management measures for the sustainable exploitation of fish resources in the Mediterranean Sea;
- Regulation (EC) no. 1224/2009 of 20 November 2009 establishing a Community control system to ensure compliance with the rules of the Common Fisheries Policy (CFP);

- Regulation (EU) no. 508/2014 of the European Parliament and of the Council of 15 May 2014 on the European Maritime and Fisheries Fund (EMFF);
- Regulation (EU) no. 1379/2013 of the European Parliament and of the Council of 11 December 2013 on the market regulation for fishery and aquaculture products;
- Commission Implementing Regulation (EU) no. 404/2011 of 8 April 2011 on the establishment of a Community control system to ensure compliance with the rules of the Common Fisheries Policy;
- Regulation (EU) 2016/1627 of the European Parliament and of the Council of 14 September 2016 on the multiannual recovery plan of Bluefin tuna in the eastern Atlantic and the Mediterranean Sea.;
- Regulation (EC) no. 2406/96 of 26 November 1996 on the determination of common market standards for certain fishery products (OJ L 334 of 23.12.1996);
- Regulation (EC) no. 1005/2008 of 29 September 2008 establishing a community system for the prevention, suppression and cessation of illegal, unreported and unregulated fishing, on the amendment of the decree;
- Regulation (EC) no. 768/2005 of 26 April 2005 on the establishment of the Fisheries Control Agency Community Regulation and amendment (EEC);
- Regulation no. 2847/93 on the establishment of a control system applied to the common fisheries policy (OJ L 128 of 21.5.2005);
- Regulation (EU) no. 1013/2010 of 10 November 2010 laying down procedures for implementing the Unions policy linked to the fishing fleet;
- Regulation (EU) no. 1388/2014 of 16 December 2014 on the assessment of certain categories of aid to entrepreneurs engaged in the production, processing and marketing of fishery and aquaculture products compatible with the internal market.

The awareness of the Croatian regulatory structure in initiating that process of Europeanization, perhaps almost vertically imposed, but necessary in order to compete with the other imposing Mediterranean realities, is clear.

Strategic importance and objectives: Articles 4 and 5

These two articles depict the strategic elements of the fishing sector in the Croatian economy, considered as achieving sustainable development of fishing and its economic, ecological and social role are main objectives for fisheries policies in the Republic of Croatia. As are the enhancements of traditional customs and arts intended as protection of the Country's intangible cultural heritage. This regulatory transition emotionally represents the handover of national maritime policy into the hands of the CFP. *"We share together a path and a common thought, while not affecting our values and centuries-old tradition".*

"The competent authority for the implementation of the regulations referred to in article 2 of this law is the Ministry responsible for fisheries affairs, which is responsible for the

management and control for the implementation of the structural policy measures of the operational program in the sector. both national and community fisheries.”

In support of the Ministry, we find a series of activities of state administration bodies, local and regional self-governing (regional) units, scientific organizations, professional institutions, institutions for the provision of services in the fisheries sector, chambers, associations, fishing cooperatives and producer organizations recognized under special rules. The regulatory recognition of the institutional supply chain supporting the sector is fundamental here.

First regulatory hints of resource measurement and management

With art. 12 we begin to evaluate the first principles of management of marine biological resources - The Minister outlines the main measures of sea management:

- a. *spatial and temporal limitation of fishing;*
- b. *construction and technical characteristics, marking, methods of use and purpose of certain types of fishing gear, fishing tools and equipment (including lighting devices in seine fishing) and fishing conditions and methods;*
- c. *the minimum reference size for the conservation of certain types of fish and other marine organisms;*
- d. *hunting areas for certain types of fish and other marine organisms;*
- e. *prohibition of all or certain fishing methods;*
- f. *ban on issuing or limiting the number of licenses for commercial sea fishing, favoring the issuing of licenses for small-scale coastal fishing and authorizations for fishing tourism;*
- g. *the allowable amount of catch in the Republic of Croatia's fishing sea, in a given fishing zone or sub-zone, by individual fishing gear, by individual licenses, by individual authorization or by group of vessels fishing together;*
- h. *methods of distribution and management of permitted quantities of catches;*
- i. *recovery plans for shellfish stocks and habitats;*
- j. *special measures needed to reduce the impact of fishing activities on the marine ecosystem;*
- k. *Protected Areas and fishing methods inside them for the protection of habitats, fish and other marine organisms;*
- l. *areas under special management.*

Special features: Data collection

The Ministry has the task of:

- creation and implementation of annual plans for data collection and coordination at national level;

- conclusion of appropriate contracts for the implementation of annual plans for data collection in fisheries from article 8, paragraph 6 of this law with the competent authority referred to article 8, paragraph 4 of this law and, if necessary, other authorities;
- monitoring and supervision of the operational implementation of the annual data collection plans - collection, processing and dissemination of statistical data relating to the plan annual data collection - delivery of reports to data end users.

For the purpose of collecting data in fishing activities referred to in Article, natural and legal persons are obliged to submit accurate and complete accounting and other data on financial and commercial activities in fisheries to the Ministry in the prescribed forms and within the prescribed deadlines. and on the processing of fishery products. The transmission of data is required in the framework of the implementation of the annual data collection plan in the ministerial fisheries sector with regulation.

Fishing subsidies

Fishing subsidies include:

- subsidies made possible in the context of structural policy in accordance with the documents adopted by article 8. paragraph 5 of this law;
- state aid pursuant to Regulation (EU) no. 1388/2014, Regulation (EU) n. 717/2014 and Guidelines for the examination of state aid in the fisheries and aquaculture sector (2015/C217/01);

The Minister has the task of:

- regulating reciprocal relations within the competent bodies in the management and control system of the Operational program;
- approving the granting of subsidies in the fisheries sector to local and regional (regional) self-government units.

The beneficiary of the fishery support may not sell or use material assets object of the support contrary to the purpose for which it is intended, be leased or transferred to any other disposition and use by other legal or natural persons for at least five years from the last payment of the perceived financial resources.

The 2022 Annual Economic Report on the EU Fishing Fleet. CROATIA

In total, around 318,500 days were spent at sea in 2020 (+4% compared to 2019), of which 69% in SSCF. In line with the limitation of effort for small pelagic purse seiners and the temporary cessation of pelagic and demersal fisheries, the reduction in effort (expressed in sea days) compared to 2014 is evident in LSF which continued in 2019 (-2% compared to the 2012-2019 average). Conversely, effort increased in SSCF by 5% compared to 2019 and by

61% compared to 2015, which is consistent with the inclusion of small-scale artisanal coastal vessels in the commercial fleet in 2015.

In 2020, the economic performance of the overall fleet remained stable compared to previous years. The total revenue estimated at EUR 90.1 million is slightly up (3%) compared to 2019, but compared to 2012-2019 the average revenue increased by 17%. The main driver for the positive trend is the increase in revenues from landings and an increase in revenues from other sources which has more than tripled since 2016 and accounts for 30% of all revenues in 2020. The total amount of GVA and Gross profit compared to 2019 increased by 13% and 28% respectively, EUR 58.9 and 31.2 million, while net profit increased by 143% (EUR 9.9 million). Total operating costs decreased in 2020 by 7% compared to 2019 and amounted to EUR 58.8 million. The lower fuel costs (-24% compared to 2019) are the result of the reduction in fuel prices in 2020, which went from 0.61 euro/l in 2019 to 0.45 euro/l in 2020, while energy consumption remained almost unchanged (+4% compared to 2019). As in previous years, personnel costs have the highest share at 31%, followed by energy costs with 15% of all costs. The downward trend in the value of physical capital, which started in 2015, stabilized in 2020 and the estimated (depreciated) replacement value amounted to EUR 280 million.

On the market and trade, it should be noted that in 2020 the average landing price of 1.5 euro/kg decreased by 7% compared to 2019 but increased overall by 9% compared to the average for the 2012-2019 period. Of the six most commercially important species, Norway lobster and sole recorded the highest prices (12.6 and 8 euro/kg respectively) in 2020, while sardine and anchovy were sold at relatively low prices (0.4 and 0.9 euro/kg). A major influence on prices of small pelagic is exercised by the destination of the product. As Croatia is a Bluefin tuna farming Country, a large amount of small pelagic landed is destined for tuna feed. Small pelagic intended for tuna feed are declared with low prices in the sales notes. These low prices have a minimizing effect on the average price of small pelagic fish.

Investments in 2020 remained stable compared to 2019. Although investments increased by 39% compared to the 2012-2019 average, the level of investments is still low (an average of EUR 5.200 per active vessel in 2020, excluding PGP vessels). LSF accounts for 59% of total investments and investments are much higher (€9.000 per vessel) than investments in SSCF (€1.000 per vessel). After Croatia's accession to the EU in 2013 and the changes that followed due to the full implementation of the Mediterranean regulation, the economic performance cannot yet be considered stable. Firstly, this is due to the ongoing definitive shutdown process at the end of 2018 affecting LSF purse seines, bottom trawls and dredgers, but also due to a process of including a large number of fishing vessels in the artisanal PGP segment. In relation to the progressive, but still limited, increase in fishing activity in the PGP segment, an overall upward trend is expected in the values of the fishing activity and in the economic indices. However, due to their large numbers, these vessels have a visible impact on the performance of the entire fleet.

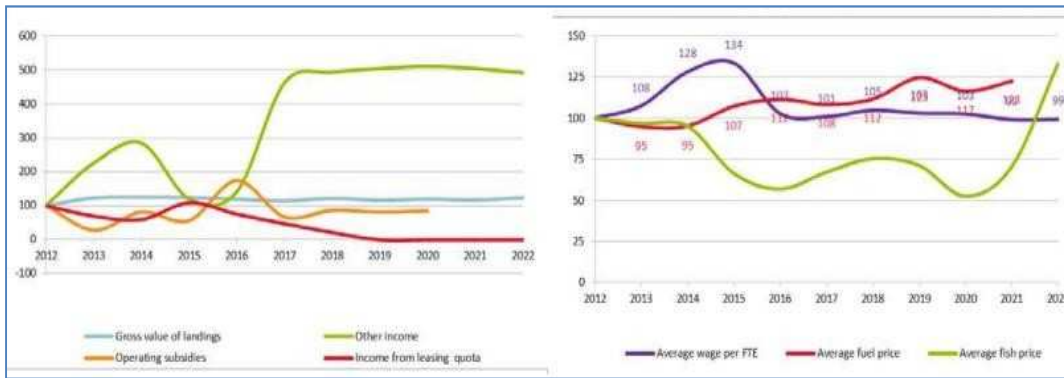


Figure 8 - Impact of energy costs on the Croatian fishery economy. Source The 2022 Annual Economic Report on the EU Fishing Fleet (STECF 22-06)

APPLICATION AND IMPLEMENTATION OF EUROPEAN LEGISLATION IN CROATIA

Analyzing in detail the current Croatian regulatory framework, which governs and regulates fishing, we realize how the transposition of the European legislation of the common fisheries policy received a sudden swerve from the Croatian government in the transposition and implementation phase between 2017 and 2019.

The change made to the parent regulatory framework of Law 62/2017 appears to be particularly significant.

The entry into force of the new text in April 2019 changes several provisions of the law on sea fishing. The changes are linked to the addition of new documents relevant for the European Union; terms of application of the law (article 6 of the original text); competent bodies (Article 8); Institutional support (article 10); management measures for biological sea facilities (technical measures from article 12); fishing fees (Article 13); inspection issues in several articles (articles 61, 62, 63 and 65); various offenses and sanctioning provisions.

The first exegetical and interpretative impression of the normative text specifies the clear intention of the Croatian legislator in wanting to go deeper into an almost lacuna present in the original text, linked to the provisions on control and supervision of activities. It highlights the fact that the 2019 text for the entire second part recalls regulatory provisions related to the sanction system, from administrative crimes to serious infringements with points on vessel licenses, as expressly requested by the European legislator who has repeatedly drawn the attention of states members on the lack of homogeneous implementation procedures of the control regulation.

Analyzing the degree of community influence of the CFP in the fisheries management system in Croatia over the last 10 years, important steps have been recorded thanks to the 2014-2020 EMFF programming in shipbuilding, in the value and transformation chain, in cooperation and development of organization of the market for fishery products with the establishment of the first producer organizations (POs).

It remains clear that the late application of a rigid sanctioning and control system such as that of the Community has, in any case, generated internal slowdowns in Croatian management policies compared to the Mediterranean states. It is necessary to carefully evaluate the data of the government authorities at the end of at least the first five years from the entry into force of the 2019 amendments, in order to be able to quantify in the best way how and to what extent this regulatory flaw has affected Croatian fisheries management policies with a view to European performance.

REGULATORY DIFFERENCES BETWEEN ITALY AND CROATIA

The analysis of the Italian and Croatian fishing regulatory systems has allowed us to highlight the internal peculiarities of their regulations in relation to the difficulties of transposition and application of the Union Law, but also to underline the key points and strengths in the planning of the sector.

In juridical terms we are faced with two regulatory systems with obvious differences between them. The Croatian regulatory system appears dynamic, and it decided in 2019, through a targeted legislative intervention, to consolidate its relationship with the EU legislator and guarantee to the sector a sustainable planning in environmental, economic and social terms. All this, by modifying the state law on fishing twice in 4 years, going to strengthen in the last part of the regulatory text of 2019 the only peculiarity not present in the previous systems, namely the integration of the sanctioning system.

The Croatian legislator has perceived the importance of integrating the sanction in order to be able to autonomously manage the fundamental aspects of sustainable planning in the coming years. Thus, the rigid justicialist semblance of a sanctioning system is lost, and, likewise, the logic of using a sanction as a concept of preservation and not punishment is considerable. Croatia is thus preparing to interpret the fundamental decade 2020-2030, ensuring a decisive role in Adriatic and Mediterranean policies.

A different discourse but no less important concerns Italy which by nature and tradition has always played a central role in Common Fisheries Policies. Faced with a regulatory reorganization ex ante Reg. 2013 - CFP reform, the Italian legislator intervened surgically in the three-year period 2014/2017 to update the regulatory framework according to the community standards required in 2013. The need for an updated consolidated text, or simply a codification of the legislation, is an increasingly urgent need. EU fishing law has by now been absorbed by the national system with awareness of the fundamental means and resources to be able to face the needs of the CFP.

In the last seven years, the role of the central ministerial authorities in terms of performance in consideration of the EMFF Programming has been satisfactory, thanks for example to the measures carried out by FLAG at territorial scale, essential for responding to the local requests and local needs.

Due to the trends recorded at the regional level, it would seem that Italy, unlike Croatia, will face the decade 2020-2030 focusing on policies for the transformation, valorization and marketing of the product. The concept of diversifying fishing into related activities has been received by fishermen in a positive way, also as a result of EU restrictions and the steep declines in turnover recorded which are often around 40% compared to 2017.

CASE STUDIES

One of the key examples of bilateral cooperation of maritime spaces in fisheries is the Italian-Croatian agreement on how to manage in the Jabuka/Pomo Pit.

Fishing Jabuka/Pomo Pit has been restricted after an extraordinary agreement: scientists, fishermen, NGOs and the authorities of two Countries - Croatia and Italy have committed themselves to protecting this area, which is crucial for the reproduction of European hake, Norway lobster and other commercial species. On 2021, the recommendations already in force since 2017 become permanent, also in order to recall the importance that this measure not only from a cooperation point of view but because it is fundamental for protect the most commercial species and consequently the sector. The Regional Organization for Fisheries Management has the power to issue binding recommendations applicable to fishing areas that require measures and restrictions, in order to ensure greater protection of the ecosystem and consequently also of the fish fauna. FRA is an acronym that stands for "Fisheries Restricted Area" which in Italian means a restricted area for fishing activities.

These are areas established as such because they are identified as particular and sensitive areas, located in deep waters, which constitute essential habitats for the completion of the various vital phases and growth of the fish species resident there, which therefore deserve a management plan attentive to their protection over time.

The FRA established in the Jabuka/ Pomo Pit was declared a method to improve the conditions of high exploitation of the demersal fish stocks in the area, in particular European hake and Norway lobster.

As regards the possible fisheries authorizations, issued specifically for the periods of rest, at the same time of drafting the recommendations, the GFCM established the possibility for each CPC to communicate a definitive list of these vessels, by April 30 of each year, which will be the definitive reference list for the whole year, thus indicating all the authorized vessels to the certain permits listed above. This list must meticulously indicate every identifying detail of the vessels both current and from the past, in case it has a history. For each vessel it is necessary to indicate: name, serial number, GFCM registration number; (if it exists): old name, old flag, your own international radio signal; and then again the type of vessel and related details on length and tonnage capacity; personal and contact details of the owner and captain; indication of the type of tool used in the FRA; indication of the

seasonal fishing permit in the FRA that the vessel already holds; number of days authorized for fishing and, finally, the home port.

For the vessels on this list, i.e. those that will be able to fish in zones B and C during periods of rest, it becomes mandatory to have the VMS, the vessel monitoring system and/or the AIS automatic identification system on board, in operation, and it will be necessary that the fishing gears that will be used are correctly registered and identified to the competent authorities, before the start of each fishing activity.

As a further indication, it is also confirmed, if a fishing vessel using bottom trawl, drift or trap nets is

intercepted, it will not require any authorization to allow fishing activities but only up to a speed of 7 knots, exclusively for vehicles equipped with VMS and/or AIS.

BEST PRACTICES

Fishing tourism in Italy. The experience of the FIT4BLUE project.

Despite the enormous opportunities it can offer to the fishing and aquaculture sector, fishing tourism, at a European level, still does not have the importance it deserves. The reasons for this lack of consideration are many, including the fact that this activity developed more in the Mediterranean Countries and that, only later, did it also arrive on the oceanic coasts of Spain and France. Furthermore, in many Member States this activity is not even practiced, which probably led the European Union to not give it due consideration, at least until now. An evident sign of this lack of attention is demonstrated by the fact that, at a European level, there is currently no common legal and regulatory framework on fishing tourism.

Each Country has therefore developed its own legislation, and this often determines that the activities and possibilities are very different depending on the Member State considered, causing disparities between fishers from different Countries.

For example, while fishing tourism in Italy is considered a professional activity, France classifies it as an occasional activity. Depending on the legal status in the different Member States, there may be significant differences regarding the tax regime, licensing procedures, qualification requirements and permitted activities. Harmonization is needed to establish a level playing field in all EU States.

The Italian legislation, issued in 1999, is the most dated European legislation, the other Member States generally have much younger legislation issued around 2010. Although national legislation has already existed for years, only in 2017 the European Parliament express its opinion on the subject of fishing tourism through a Resolution that approved the "Report on the role of tourism linked to fishing in the diversification of fishing and aquaculture activities", providing some general indications on the matter. This represented a very important guiding act, which could trigger the enactment of a desirable European

directive on the matter, which recognizes the "unexploited potential of tourism linked to fisheries and aquaculture, which can bring significant benefits to coastal communities diversifying sources of income.

Furthermore, the EU "believes that fishing tourism at sea and fishing tourism on land can complement commercial fishing and aquaculture and provide additional income to fishing/aquaculture farming communities".

In relation to this, a European project funded by the European Union through the Erasmus plus call has recently been concluded which involved 4 Member States (France, Italy, Greece and Spain) in an analysis of the regulations and fishing tourism activities in the 4 Countries, seeking to find the main differences and the main similarities in terms of legislation, procedure for acquiring the license and possibilities granted to local fishers/aquaculture farmers in terms of fishing tourism and diversification activities.

The project, entitled FIT4BLUE (<https://fit4blue.org/it/home-it/>), highlighted that the Italian legislation, being also the first legislation enacted in Europe, is also the most complete (and complex) in terms of European, this for various reasons:

1. Because it takes into consideration both sea and land activities (itti-tourism) delegating the exclusive exploitation to the holders of a fishing license or aquaculture concession and effectively cutting out the tour operators not belonging to the sector;
2. Because it allows tourists on board to also carry out a series of extra activities such as for example: the possibility of partially participating in fishing activities and the possibility of practicing port fishing, snorkeling, or tasting the catch of the day directly on board: all activities that make fishing tourism certainly more attractive.
3. Finally, because it is one of the few European regulations that equates fishing tourism activities with those of professional fishing, allowing a fisherman to receive an income deriving 100% from fishing tourism.

Also within the project and on the basis of this sector study, a common training program on fishing tourism was created which could be used in the 4 Countries.

The training program was made available on an online platform (<https://fit4blue-training.org/login/index.php>) and was tested in some pilot courses, carried out in the participating Countries, addressed to fishers and mentors. The initiative had some success in Italy, especially among the mentors, both for the opportunity to compare the legislative framework of different states, and to learn about the differences between the various most widespread fishing tourism activities.

The fishers, on the other hand, have still shown little interest in an activity that they see today as difficult to achieve due to the difficulty in informing tourists and finding interested ones, due to the complex bureaucratic procedure that usually has to be faced to obtain the authorization and for a cultural heritage that sees the fisherman devoted only to fishing and no other activity.

Fishing tourism in Croatia

Considering that the traditional fishing sector has undergone a progressive deterioration and that diversification has become a necessity for many small and medium scale fishermen in order to increase forms of income, often insufficient, when it comes to diversification in the fishing sector it is necessary to take into account the fact that a large part of the sector depends almost entirely on traditional forms of fishing. Most of the Croatian coastal and island areas are experiencing a severe economic recession leading to depopulation of these areas, as inhabitants move to areas with more opportunities in terms of employment and education and, although some tourist destinations are located in areas where fishing and aquaculture are widely practiced, these activities fail to achieve adequate economic growth linked to tourism, despite the sectors being very compatible. Subjected to a strong seasonality that is concentrated above all in the summer months, we will try to understand what are the critical regulatory issues and the strengths of Croatian fishing tourism. Fishing tourism in Croatia is regulated by the law n. 62/2017 to article 36, i.e., the law on sea fishing. Here the arrogance of the rule is immediately evident in underlining that only the holder of the "privilege" can participate in fishing operations in the context of sea fishing tourism. In exercising fishing tourism, the authorized person has the right to engage in commercial fishing, also finding appropriate application in the provisions of special rules which regulate the provision of services in the tourism and/or catering sector. At the art. 37 analyzes the modalities for exercising fishing tourism which can only be practiced on the basis of an authorization for fishing tourism, available at the request of the owner of a vessel registered for the privilege of exercising commercial fishing at sea and issued by the ministry with a provision accompanied by an authorization form for fishing tourism. The conditions for issuing fishing tourism authorization obviously require the possession of a vessel with a valid entry in the fishing vessel register, the privilege to engage in commercial fishing at sea and proof that the aforementioned ship is authorized to provide tourist services, or passenger transport services according to special regulations. The Ministry keeps the Fishing Tourism Authorization Register in electronic form.

At the art. 38 we find the cases of Cancellation of the authorization for fishing tourism. Given the great demand in recent years, the regulatory discipline has deemed it appropriate to limit and detail some aspects regarding the possibility of revocation.

Fishing tourism authorization is revoked:

- At the request of the owner of a vessel which has been granted the privilege to engage in commercial fishing at sea;

(2) Food, beverage and beverage services may be provided on board the fishing vessel.

Finally, we can add that the Croatian legislation does not address the issue of fishing tourism on land (itti-tourism) which is substantially not regulated but practiced. At the regulatory level, therefore, also for the fishing tourism activity, what has been seen for fishing and aquaculture is substantially reconfirmed: Croatia in general has individual (and not regional) national regulations that are more streamlined and easier to interpret than Italy which has more detailed and often regionally different regulations. Having analyzed the regulatory discipline of Croatian fishing tourism, we cannot fail to dwell on the social and economic aspects of this sector in Croatia and how the diversification of the main income is amalgamated with a sustainable concept of preservation of marine habitats. Croatian fishers thus find an alternative source of secure income (tariffs vary from 40 to 150 euros per person) and reduce their fishing effort on fish stocks by catching only enough to meet the daily needs of tourists. Fishing tourism, however, is still a relatively new activity in the Mediterranean and is in different stages of development in the various Countries, and the support to operators in the acquisition of entrepreneurial and managerial skills and their approach to the tourism sector is therefore fundamental. Here the CFP intervenes by proposing workshops and training aimed at providing the technical knowledge and technological and marketing skills necessary to manage a successful business. The administrative procedures for obtaining the necessary permits for fishing tourism are still complex and an initial investment of around 4.000-5.000 euros is required to make the vessel compliant with the standards. The EMFF finances the sustainable development of the sector, but the request to access funding is not simple and consists only of the reimbursement of the work performed, hence the need for an initial investment. In terms of conservation, the data from the WWF is also clear, showing, for example, that the length of the nets of vessels engaged in fishing tourism has decreased from 2-3 km to 200-300 m, while the additional income deriving from summer season allows to reduce the fishing pressure in the autumn-winter period. This reduction is both good news for fish stocks who gain time to recover and for the fishers themselves, who gain in terms of improved working conditions on board, less physical discomfort and fewer hours spent at sea away from home. In conclusion, we can define that the comparative experience between the two Croatian and Italian legislations on the subject of fishing tourism highlights aspects that cannot only take into account the regulatory diversity that distinguishes them. In this context, the social dynamics, the characteristics and the natural qualities of the territories together with the traditional and cultural settings of the sea trades, are too different to be able to clarify which of the two legislations can integrate with the other. Croatia has fully implemented the concept of income diversification, and has deemed it appropriate to standardize it with simplicity, firmly linking it to sustainable tourism programmes.

9. Legislative Decree 26 May 2004 n. 154 Modernization of the fishing and aquaculture sectors, in accordance with Article 1, paragraph 2, of Law no. 38;
10. Legislative Decree 27 May 2005, n. 100 - Further provisions for the modernization of the fisheries and aquaculture sectors and for the strengthening of the surveillance and control of sea fishing, pursuant to art. 1, paragraph 2, of the law of 7 March 2003, n. 38;
11. Legislative Decree 4 August 2008, n. 148 - Implementation of Directive 2006/88 / EC relating to the health police conditions applicable to aquaculture animal species and related products, as well as to the prevention of certain aquatic animal diseases and to the measures to combat such diseases;
12. Legislative Decree of 9 January 2012 n. 4 Measures for the reorganization of the legislation on fisheries and aquaculture;
13. Ministerial Decree of 14 February 2013, n. 79 Discipline of the procedure for issuing and renewing the authorization to operate aquaculture facilities in the sea located at a distance of more than one kilometer from the coast;

Environmental impact

1. Water Framework Directive (Directive 2000/60/EC)
2. Marine Strategy Framework Directive (Directive 2008/56/EC)
3. Decision on good ecological status (Decision 2017/848/EC)
4. Birds Directive (Directive 2009/147/EC)
5. Habitat Directive (Directive 92/43/EEC)
6. Industrial Emissions Directive (Directive 2010/75/EU)
7. Regulation concerning the use of alien and locally absent species in aquaculture (Regulation (EC) No. 708/2007)
8. Regulation on invasive species (Regulation (EU) No. 1143/2014)
9. Environmental Impact Assessment Directive (Dir. 2011/92/EU) on the assessment of the effects of certain plans and programs on the environment (Directive 2001/42/EC);
10. Law n. 23, 9 March 2022 - Provisions for protection, development and competitiveness of agricultural, agri-food and aquaculture production using organic methods.

Hygiene and food safety

1. Decree of the President of the Republic of 12/30/1992 n. 555, regulation for the implementation of Directive 91/67/EEC which establishes animal health rules for aquaculture products, Ordinary Supplement n. 12 to the Official Gazette - General Series of 04/02/93 n. 28 p. 17;
2. Ministerial decree of 29/01/1997, amendments to the decree of the President of the Republic of 30 December 1992, n. 555, containing the regulation for implementation of Directive 91/67/EEC which establishes animal health rules for the marketing of aquaculture animals products. Official Gazette - General Series - 21/04/1997 n. 92 p. 29;

3. Decree of the President of the Republic 16 December 1999, n. 543 Regulation containing the implementing rules of Directive 98/45/EC, which amends Directive 91/67/EEC concerning animal health rules for the marketing of aquaculture animals and products;
4. Regulation (EC) n. 854/2004 of the European Parliament and of the Council of 29 April 2004 which establishes specific rules for the organization of official controls on products of animal origin intended for human consumption;
5. Implementation of Directive 2006/88/EC relating to animal health conditions applicable to aquaculture animal species and related products, as well as to the prevention of certain diseases of aquatic animals and to measures to combat these diseases.
6. Amendment of annex IV, part II, of legislative decree 4.8.2008 n. 148 on "*Implementation of Directive 2006/88/EC relating to animal health conditions applicable to aquaculture animal species and related products, as well as to the prevention of certain diseases of aquatic animals and measures to combat such diseases*" in implementation of the Directive Commission execution 2014/22/EU amending Annex IV of Council Directive 2006/88/EC as regards infectious salmon anemia.
7. Amendment of annex IV of the legislative decree 4 August 2008, n. 148, containing: "*Implementation of Directive 2006/88/EC relating to animal health conditions applicable to aquaculture animal species and related products, as well as to the prevention of certain diseases of aquatic animals and to measures to combat these diseases*" as regards the spring viremia of carp, in implementation of Directive 2008/53/EC.
8. Legislative Decree n. 136 of 5 August 2022 - Implementation of article 14, paragraph 2, letters a), b), e), f), h), i), l), n), o) and p), of the law of 22 April 2021 , n. 53 to adapt and link national legislation on the prevention and control of animal diseases that are transmissible to animals or humans, with the provisions of Regulation (EU) 2016/429 of the European Parliament and of the Council of 9 March 2016. (22G00144)

Labeling and traceability

1. EC Reg. n. 104/2000 of the Council of 17 December 1999 Relating to the common organization of the markets in the fishery and aquaculture products sector;
2. EC Reg. n. 2065/2001 of the Commission of 22 October 2001 which establishes the methods of application of Reg. (EC) 104/2000 with regard to consumer information in the fishery and aquaculture products sector;
3. Ministerial Decree of 27 March 2002 Labeling of fish products and control system;
4. Application Circular Mipaaf 27 May 2002 to Reg. N. 2065/2001 of the Commission of 22 October 2001 containing the methods of application of EC Reg. 104/2000, relating to information to consumers in the fishery and aquaculture products sector;
5. Ministerial Decree 31 January 2008 of 31/01/08 Names in Italian of fish species of commercial interest (which replaces the list present in Ministerial Decree 25 July 2005);

6. Reg. (EC) 1224/2009 establishing a Community control system to ensure compliance with the rules of the common fisheries policy;
7. Reg. (EU) 404/2011 laying down methods of application of Reg. (EC) no. 1224/2009 of the Council establishing a Community control system to ensure compliance with the rules of the common fisheries policy;
8. Reg. (EU) n. 1379/2013: common organization of markets in fishery/aquaculture sector;
9. Circular of the Ministry of Agricultural, Food and Forestry Policies (12/12/2014) - Circular on compliance with the traceability and labeling of fish products pursuant to Reg. (EC) 1224/2009, Reg. (EU) 404/2011 and of Reg. (EU) 1379/2013.

Worker safety

1. Legislative Decree 27 July 1999, n. 271 "Adjustment of the legislation on the safety and health of seafarers on board national merchant fishing vessels, pursuant to law no. 485 of 31 December 1998" published in the Official Gazette no. 185 of 9 August 1999;
2. Legislative Decree 9 April 2008, n. 81 SINGLE TEXT ON HEALTH AND SAFETY AT WORK

ASPECTS RELATING THE TRANSPOSITION AND IMPLEMENTATION OF THE EUROPEAN LEGISLATION IN ITALY

The EU has **exclusive competence** in the following areas:

- a) customs union;
- b) definition of the competition rules necessary for the functioning of the internal market
- c) monetary policy for the Member States whose currency is the euro;
- d) **conservation of the biological resources of the sea within the framework of the common fisheries policy;**
- e) common commercial policy.

Therefore, the competence for the "conservation of biological resources" is entirely the responsibility of the EU and this means that member states must in some way adapt to its provisions. Following the European regulations issued in 2006 and 2008 (Council Regulation (EC) No. 1198/2006 of July 27, 2006 and Council Regulation (EC) No. 1005/2008 of September 29, 2008), Italy therefore issued of the provisions through the **law of 4 June 2010, n. 96** "Provisions for the fulfillment of obligations deriving from Italy's membership of the European Communities - Community Law 2009" which, in Article 28, underlines that the competence in the matter of reorganization of the legislation on fisheries and aquaculture lies with the Government.

Art. 28 of the law of 4 June 2010 (Delegation to the Government for the reorganization of the legislation on fishing and aquaculture)

1. The Government, for the correct and complete implementation of the criteria and objectives provided for by Regulation (EC) n. 1198/2006 of the Council of 27 July 2006, the

new guidelines on state aid as well as Regulation (EC) n. 1005/2008 of the Council of 29 September 2008, which establishes a Community regime to prevent, discourage and eliminate illegal, undeclared and unregulated fishing, is delegated to adopt, within eighteen months from the date of entry into force of this law, without new or greater burdens for public finance, one or more legislative decrees for the reorganization, reorganization, coordination and integration of national legislation on fisheries and aquaculture, through the compilation of a single regulatory text, in compliance with the following principles and guidelines:

- a) promote generational turnover and enhancement of the multifunctional role of the fishing and aquaculture company, also through the concentration of supply in harmony with EU competition provisions;*
- b) eliminate duplication and simplify fisheries and aquaculture legislation;*
- c) encourage the development of marine resources and aquaculture, favoring local entrepreneurship initiatives, also with the support of the multifunctionality of the fishing and aquaculture company also in order to create alternative sources of income;*
- d) harmonize and rationalize the legislation on controls and fraud in the fishing and aquaculture sector in order to better protect consumers and eliminate obstacles to trade;*
- e) identify suitable technical conservation measures for fish species in order to ensure the sustainable development of the fishing and aquaculture sector and the rational management of the biological resources of the sea;*
- f) prevent, discourage and eliminate illegal, undeclared and unregulated fishing;*
- g) ensure the consistency of non-professional fishing with Community provisions on fisheries.*

2. The legislative decrees referred to in paragraph 1 are adopted on the proposal of the Minister of Agricultural, Food and Forestry Policies, in agreement with the Minister for European Policies and with the other Ministers concerned, having obtained the opinion of the Council of State and the Permanent Conference for relations between the State, the regions and the autonomous provinces of Trento and Bolzano.

3. The Government transmits to the Chambers the draft legislative decrees referred to in paragraph 1, accompanied by the technical-regulatory analysis and the analysis of the impact of the regulation, for the expression of the opinion by the competent parliamentary committees. Each Commission expresses its opinion within thirty days from the date of assignment of the draft legislative decrees. Once this term has elapsed in vain, the legislative decrees can in any case be issued.

4. Within 2 years from the date of entry into force of the legislative decrees provided for in paragraph 1, corrective and supplementary provisions may be issued in compliance with the procedures referred to in paragraphs 1 to 3.

Two years after the issuance of the law of 4 June 2010, the **LEGISLATIVE DECREE 9 January 2012, n. 4** which contains "*Measures for the reorganization of the legislation on fisheries and aquaculture, pursuant to article 28 of law no. 96.*"

"This legislative decree in accordance with the guiding principles and criteria referred to in paragraph 1 of article 28 of law no. 96, provides for the reorganization, coordination and integration of national legislation on fisheries and aquaculture, without prejudice to regional competences, in order to correctly implement the criteria and objectives provided for by Regulation (EC) no. 1198/2006 of the Council of 27 July 2006, as well as by Regulation (EC) no. 1005/2008 of the Council of 29 September 2008, which establishes a Community regime to prevent, discourage and eliminate illegal, undeclared and unregulated fishing".

Italian legislation has therefore been updated step-by-step with regard to information from the European Union. The national legislation concerning aquaculture was in fact issued independently from that promoted by the EU and was subsequently adapted. This naturally caused delays in adapting to European standards: national regulations usually took a couple of years to be adequate and, in some cases, the European guidelines were not immediately implemented.

In Italy, the competences in the field of aquaculture mainly belong to the Regions. For this reason, some managerial differences could be found. With respect to this situation, the central administration has established a table of discussion and exchange of view between different stakeholder but also regional administrations called ITAQUA PLATFORM, please see paragraph 3.4.

AQUACULTURE IN THE CROATIAN LEGAL ORDER

The main reference regulations regarding aquaculture in Croatia are:

1. Aquaculture Law (Official Journal No. 130/2017);
2. Law on amendments to the law on aquaculture (Official Journal No. 111/2018);
3. Law on amendments to the law on aquaculture (Official Journal No. 144/2020);
4. Regulation on the register of use of foreign and locally absent species in aquaculture, on the Register of Imports and Transfers and on the List of closed aquaculture facilities (GU n. 10/2018);
5. Ordinance on licenses for aquaculture (Official Gazette No. 17/2018);
6. Ordinance on Vocational Training for Aquaculture Activities (Official Gazette No. 56/2018);
7. Ordinance on criteria for suitability of maritime areas for marine aquaculture (OJ No. 106/2018);
8. Regulation on the collection of statistical data on aquaculture (GU n. 137/2021 and 87/2022);
9. Regulation on the authorization to carry out aquaculture activities in family-run farms (GU, n. 15/2019);

10. Ordinance on the disposal of tuna farming capacity and permitted input quantities of caught wild tuna (*Thunnus thynnus*) to farms (GU n. 22/2021, 9/2022);
11. Ordinance on the labeling of farms, on the monitoring of operations on farms and on traceability in the breeding of Bluefin tuna (*Thunnus thynnus*) (OJ no. 63/2022).

In Croatia, aquaculture is regulated by law 144 of 2020 (NN144/2020) which amends law 130 OF 2017 (NN 130/2017).

Within the law it is immediately specified that the purpose of the legislation is **to regulate the implementation of the Common Fisheries Policy (CFP) for the aquaculture sector.**

"This law governs the implementation of the common fisheries policy of the European Union in the part relating to aquaculture, determines the national objectives for the development of aquaculture, the methods and conditions for carrying out aquaculture activities, activities on farms, the competent authorities for the implementation of aquaculture support and regulation, supervision and control of the market, as well as other important issues for aquaculture".

All the European regulations to which the law refers are then specified.

This law governs the framework for the implementation of EU regulations in the part relating to aquaculture:

1. Regulation (EU) no. 1380/2013 of the European Parliament and of the Council of 11 December 2013 on the common fisheries policy, which amends Regulation (EC) no. 1954/2003 and (EC) n. 1224/2009 and repealing Regulation (EC) no. 2371/2002 and (EC) no. 639/2004 and Council Decision 2004/585 / EC (OJ L 354 of 28 December 2013), (hereinafter: Regulation (EU) No. 1380/2013);
2. Regulation (EC) no. 708/2007 of 11 June 2007 on the use of alien and locally absent species in aquaculture (OJ L 168 of 28 June 2007), (hereinafter: Council Regulation (EC) No. 708/2007);
3. Regulation (EC) no. 535/2008 of 13 June 2008 laying down the procedures for implementing Regulation (EC) no. 708/2007 on the use of alien and locally absent species in aquaculture (OJ L 156 of 14 June 2008), (hereinafter: Commission Regulation (EC) No. 535/2008);
4. Regulation (EC) no. 762/2008 of the European Parliament and of the Council of 9 July 2008 on the transmission of statistical data on aquaculture by the Member States and the repeal of Regulation (EC) no. 788/96 (OJ L 218 of 13 August 2008);
5. Regulation (EU) 2016/1627 of the European Parliament and of the Council of 14 September 2016 on the multi-annual plan for the recovery of Bluefin tuna in the eastern Atlantic and the Mediterranean Sea and on the repeal of Regulation (EC) no. 302/2009 (OJ L 252 of 16/09/2016), (hereinafter Regulation (EU) 2016/1627);
- 6 of Regulation (EU) no. 640/2010 of the European Parliament and of the Council of 7 July 2010 on the establishment of a program for the documentation of the capture of Bluefin tuna

(*Thunnus thynnus*) and on the amendment of Regulation (EC) no. 1984/2003 (OJ L 194 of 24 July 2010), (hereinafter: Regulation (EU) no. 640/2010);

7. Regulation (EU) no. 1379/2013 of the European Parliament and of the Council of 11 December 2013 on the regulation of the common market for fishery and aquaculture products, which amends Regulation (EC) no. 1184/2006 and (EC) no. 1224/2009 and repealing Regulation (EC) no. 104/2000 (OJ L 354 of 28 December 2013);

8. Regulation (EC) no. 199/2008 of 25 February 2008 on the establishment of a Community framework for the collection, management and use of data in the fisheries sector and support for scientific advice in relation to the common fisheries policy (OJ L 60 of 5 March 2008), (hereinafter: Council Regulation (EC) No. 199/2008);

9. Regulation (EC) no. 1224/2009 of 20 November 2009 on the establishment of a Community control system to ensure compliance with the rules of the common fisheries policy, on the amendment of Regulation (EC) no. 847/96, (CE) n. 2371/2002, (EC) no. 811/2004, (EC) n. 768/2005, (EC) n. 2115/2005, (EC) n. 2166/2005, (EC) n. 388/2006, (EC) no. 509/2007, (EC) n. 676/2007, (EC) n. 1098/2007, (EC) n. 1300/2008, (EC) no. 1342/2008 and repealing Regulation (EEC) no. 2847/93, (CE) n. 1627/94 and (CE) n. 1966/2006 (OJ L 343 of 22 December 2009), (hereinafter: Council Regulation (EC) No. 1224/2009);

10. Regulation (EU) no. 508/2014 of the European Parliament and of the Council of 15 May 2014 on the European Fund for Maritime Affairs and Fisheries and the repeal of Regulation (EC) no. 2328/2003, (EC) n. 861/2006, (EC) no. 1198/2006, (EC) n. 791/2007 and of Regulation (EU) no. 1255/2011 of the European Parliament and of the Council (OJ L 149 of 20/05/2014), (hereinafter: Regulation (EU) no. 508/2014).

All this to underline how in Croatia, a recently established Country, the legislation was born on the basis of European directives, with particular reference to the CFP, which were already in vogue at the time of the creation of the Croatian national legislation, this avoided a whole series of related problems. transposition and uniformity as regards application at regional/local level.

PROBLEMS IN THE APPLICATION AND TRANSLATION OF EUROPEAN LEGISLATION IN CROATIA

As already mentioned, Croatian legislation on aquaculture is very recent (2017 and 2020) and was therefore immediately based on the concepts of the CFP.

Currently, in Croatia aquaculture legislation was already present before 2017, but it was combined with fishing legislation which was in turn divided into two sectors: fresh water and salt water.

In 2017, a separate and exclusive aquaculture law was finally established which combined marine and freshwater aquaculture but excluded fishing.

Obviously, Croatia's attempt to move from a national regulation based on national market and national standards to a regulation which aimed to fully apply the European regulation of the CFP was very arduous.

Aquaculture farmers have had to adapt to very different standards from those previously required, especially as regards the use of antibiotics, the use of feed, environmental protection regulations, labeling, issuing of authorizations and traceability for the sale of the product within the Country and within the European Community.

For example, the European indications on traceability and labeling were immediately applied to the Croatian product destined for export and were not initially applied with regard to national internal trade which has maintained less stringent standards.

REGULATORY DIFFERENCES BETWEEN ITALY AND CROATIA

To begin with, we can say that the main difference between the regulations lies in the fact that the Croatian legislation, being more recent and concerning a recently established state, has been structured on the basis of EU indications and therefore already contains within it the indications coming from the CFP.

This already marks an important difference with respect to the Italian legislation that pre-existed the European indications of the CFP and the standards required by Europe and was therefore updated and adapted several times over a longer period.

Particular differences are then found in the EU environmental legislation. EU environmental legislation and national implementing legislation have established the regulatory framework for EU aquaculture. This framework makes it possible to mitigate the possible impacts of aquaculture activities on the environment (in terms of CO2 footprint, effluents, waste or other impacts on marine and freshwater ecosystems) and to ensure that they do not cause significant damage to ecosystems or biodiversity. The Commission's guidance documents and the case law of the European Court of Justice clarify the application of this legislation to the aquaculture sector. In particular, the reference standards are:

- Water framework directive (directive 2000/60/EC)
- Marine Strategy Framework Directive (Directive 2008/56/EC)
- Decision on good ecological status (decision 2017/848/EC)

- River basin management plans
- Birds Directive (Directive 2009/147/EC)
- Habitats Directive (Directive 92/43/EC)
- Industrial Emissions Directive (Directive 2010/75/EU)
- Regulation on the use of exotic/locally absent species in aquaculture (Reg. N. 708/2007)
- Regulation on invasive species (Regulation EU no. 1143/2014)
- Environmental Impact Assessment Directive (Directive 2011/92/EU)
- Directive on the assessment of the effects of certain plans and programs on the environment (Directive 2001/42/EC).

Furthermore, specific legislation for organic production promotes, through certification and labeling, an aquaculture that meets more stringent requirements in terms of environmental impact and animal welfare, as well as limited and regulated use of external production factors.

However, the requirements of EU legislation are not always clear for all those involved. EU Member States do not seem to give a uniform interpretation to EU legislation, which undermines the level playing field for EU aquaculture producers. Furthermore, implementation of EU legislation is often shared between different administrative entities or levels of governance, which do not always ensure adequate cooperation or have the necessary level of expertise in the sector.

The same happens between Italy and Croatia, where Italy, starting from the solid foundations of its legislation, in many cases has already achieved EU standards, while Croatia has to deal with an aquaculture production subject to "young" legislation and with a market not accustomed to EU standards, which is therefore trying to adapt but more slowly in non-legislative terms than in putting the law into practice. By way of example, with regard to the cooperation between the various administrative levels and stakeholders, in Italy, the MASAF - DG PEMAC makes use of the ITAQUA platform, which represents a table for discussion useful for facilitating discussion on various issues directly connected to aquaculture (i.e., state of implementation at the regional level of the definition of areas designated for aquaculture - AZA).

Compared to recent legislation in the sector, instead, "Salvamare" law (17 May 2022, No. 60) is cited as an example, for which Italy organized an inter-ministerial table for permanent consultation on the fight against marine pollution and a coordination inter-ministerial meeting headed by MASE with consultation of representatives of regional administrations and sector operators to define criteria relating to the containment of the environmental impact deriving from aquaculture and fish farming activities.

Further efforts like these are therefore needed to ensure a more uniform and coherent implementation of the environmental regulatory framework. In particular, one of the most problematic aspects is related to the complexity of existing EU legislation aimed at ensuring good water quality for bivalve mollusks that's leads to confusion. Such legislation would

benefit from clarification and better links with other relevant pieces of EU legislation. Greater clarity is needed especially as regards the differences in the requirements (in terms of collection areas classification, health inspections etc.).

CASE STUDIES

The EU, in order to create the internal market and, in particular, to ensure the proper functioning of the Common Markets Organization, has established that it is essential that the placing on the market of live bivalve mollusks is no longer hampered by existing disparities in the Member States in terms of health requirements. This has made it possible to better harmonize production and placing on the market and to establish competition on equal terms, guaranteeing quality products for the consumer in all Member States.

The regulation (EC) no. 854/2004 establishes specific rules for the organization of official controls on products of animal origin intended for human consumption. It stipulates that Member States are required to ensure that the production and placing on the market of live bivalve mollusks, live echinoderms, live tunicates and live marine gastropods is subject to official controls as described in Annex II.

Annex II, Part A, Chapter II, paragraph 2 of Regulation (EC) No 854/2004 establishes that the competent authority must classify the production areas in which it authorizes the collection of live bivalve mollusks according to their belonging to one of the three categories according to the level of fecal contamination and establishes also that the competent authority can classify as class A areas the areas in which live bivalve mollusks can be harvested directly for human consumption.

In order to classify production areas, the competent authority should define a review period for the sampling data relating to each production and relaying area to determine compliance with the criteria specified in that Regulation.

Live bivalve mollusks harvested in these areas must meet the health requirements set out in Annex III Section VII Chapter V of Regulation (EC) no 853/2004 of the European Parliament and of the Council.

According to the new Commission Regulation (EU) 2015/2285, the samples of live bivalve mollusks from zone A must not exceed 230 Cfu/g of E. coli in 80% of the samples collected during the review period. (Cfu: Colony-Forming Unit). The remaining 20% of samples should not exceed 700 Cfu/g of E. coli.

When assessing the results for the defined review period to maintain an area in class A, the competent authority may decide, based on a risk assessment following an investigation, not to take into account an abnormal result that exceeds the level of 700 Cfu/g of E. coli.

Class A areas: areas from which live bivalve mollusks can be harvested directly for human consumption. The live bivalve mollusks harvested from these areas must meet the health requirements set out in Annex II, section VII, chapter V, of Reg. (EC) n. 853/2004.

Class B areas: areas from which live bivalve mollusks can be harvested and placed on the market for human consumption only after undergoing treatment in a purification center.

Class C areas: areas from which live bivalve mollusks can be harvested, but can only be placed on the market after long-term relaying (minimum 2 months), combined or not with purification, or after intensive purification, for a period to be defined, in order to meet the required health requirements. (Fig. 11).

Class	Microbiological standard (per 100 g of pulp and intravalvar liquid)	Treatment required after collection
A	≤ 230 Cfug of <i>E. coli</i>	No one
B	≤ 4.600 Cfug of <i>E. coli</i> in 90% of samples. The remaining 10% must not exceed ≤ 46.000 Cfug of <i>E. coli</i>	<ul style="list-style-type: none"> • Purification • Purification in areas classified for the purpose of stabling • processing in approved establishments
C	≤ 46.000 Cfug of <i>E. coli</i>	<ul style="list-style-type: none"> • Long purification (≥ 2 months) • processing with recognized methods
Foreclosed	> 46.000 Cfug of <i>E. coli</i>	Collection not allowed

Figure 9 - Classification of harvesting areas for bivalve mollusks in the European Community

This zoning applies to all Member States and requirements have been established for all stages of the collection, handling, storage, transport and distribution of live bivalve molluscs, in order to safeguard the public health of consumers.

This is also due to the fact that it is important, in the event of a health problem after the placing on the market of live bivalve molluscs, to be able to trace the shipping plant and the area of collection. For this reason, it was also necessary to introduce a registration and labelling system that made it possible to follow the path of a batch after collection.

Live bivalve molluscs obtained from collection areas that do not allow direct and safe consumption can be made safe by subjecting them to a process of purification or relaying in clean water for a relatively long period. Control measures organized at Community level have also been introduced to ensure uniform application in all Member States of the legislation on live bivalve molluscs. Live bivalve molluscs produced in a third Country and intended to be placed on the Community market must not benefit from more favourable conditions than those applied in the Community, in order to allow the Community to apply a common import regime based on conditions of equivalence.

BEST PRACTICES

Allocated Zones for Aquaculture (AZA)

"Ensuring the sustainable development of aquaculture through spatial planning and increasing the potential of sites" is one of the priority objectives of the Strategic Aquaculture Plan 2014-2020 and the Operational Program of the EMFF 2014-2020 to promote innovative and competitive, environmentally sustainable and resource efficient. For this reason, numerous projects in Italy have dealt with how to identify the "marine areas for aquaculture" called AZA. In particular, a guide has recently been published, drawn up by ISPRA for the Directorate-General of Maritime Fisheries and Aquaculture at MASAF, which is the result of a long cognitive and participatory process, shared at the Mediterranean level with the FAO-GFCM and, at Italian level with the competent regional and ministries departments, the API and AMA associations, aquaculture operators, the scientific community, the Environmental Agencies and the Experimental Zoo-prophylactic Institutes, which were consulted. This "AZA Guide for the Mediterranean and Black Sea" is a practical tool to facilitate the understanding of the planning and identification processes of AZA and to guide in the selection of new marine sites, taking into account the constraints, pressures, existing uses and the state of the marine environment and the bearing capacity of ecosystems. The contents of this Guide are technical support for the Regional Administrations and the Technical Committee of the Ministry of Infrastructure and Transport, which are drafting the Maritime Space Management Plans, (Legislative Decree 201/2016) and for all interested parties in various ways, aquaculture in the first place, in planning the development of aquaculture in marine areas and in the growth of aquaculture in Italy.

The guide was shared in the context of the ITAQUA platform (mentioned above) in order to allow its widespread distribution to regional administrations and stakeholders.

BIO brand for mussels farming

Organic aquaculture is a relatively new production sector compared to organic farming, for which there is already a long experience at European level. Total European organic aquaculture production is estimated at 74.032 tons in 2020, representing 6.4% of total European production. Production increased by 60% compared to 2015 and this is mainly due to the growth of organic mussel production. The main species are:

- mussels (41.936 tons), which represent more than 50% of the total production of organic aquaculture;
- salmon (12.870 tons);
- trout (4.590 tons);

- carp (3.562 tons);
- oyster (3.228 tons);
- sea bass/sea bream (2.750 tons)

The main European producers of BIO aquaculture are Ireland (salmon and mussels), Italy (mussels and various fish species), France (oysters, mussels and trout), the Netherlands (mussels), Spain (mussels and sturgeons), Germany, Denmark and Bulgaria (mussels).

In Italy, many aquaculture producers have obtained BIO certification for farmed products. Given the growing consumer interest in organic products, it is likely that more and more aquaculture units will switch to organic production. Among the most certified activities there is certainly the mussel farming which in recent years has intensified the production of organic mussels in Italy (especially in Emilia-Romagna). Reg. (EU) no. 2018/848 indicates what the objectives of organic aquaculture are, among the most important are:

1. Help protect the environment and the climate;
2. Maintain resilience of ecosystems in the long term (sustainable use of resources);
3. Contribute to a high level of biodiversity and use of local species;
4. Contribute to strict animal welfare criteria;
5. Disease prevention and prophylaxis (use of drugs limited to particular cases);
6. Promote short supply chains and local production;
7. Guarantee high quality productions.
8. Absence of GMOs (farmed animals and juveniles, feed materials (soy) and additives) and of sterile or female triploid animals only;
9. Ban on the use of hormones and ionizing radiation;
10. Reduction of the stocking density, considering the ecological capacity of the rearing site and the needs of the bred species;
11. Decrease in the use of fishmeal proteins in feed; use of only organic and sustainable fishery / aquaculture feed and use of proteins from plant sources;
12. Ban on the use of chemicals and synthetic drugs; use of natural medicines, no to the use of antibiotics for prophylactic purposes and allowed only in special cases for the protection of animal welfare;
13. Monitoring of the impact on the environment (annual sustainable management plan), especially with regard to waste effluents;
14. Process of farming and marketing the product so that it can be certified as organic;
15. Organic and non-organic production units are adequately separated and recognizable.
16. For filter-feeding mollusks: farming in areas that are suitable in terms of health and are of high or good ecological status (directive 2000/60/EC - directive 2008/56/EC), or production areas classified as A (reg. (EC) n. 854/2004 and reg. (EU) 2017/625).

Mussel farming is a type of aquaculture that already respects all these objectives in itself because: - it does not involve the use of feed or antibiotics; - it does not involve the use of chemicals; - it has positive effects on the marine environment due to the ecosystem services

it guarantees (filtration of excess nutrients; formation of biodiversity "hotspots" providing shelter and shelter for the life and reproduction of many species of fish, mollusks and crustaceans; protection of coasts from waves); - it has positive effects on elimination of environmental CO2 thanks to their calcareous shell. There are therefore no significant differences in the production method between conventional and organic bivalves. What changes is the number of checks carried out on the product to guarantee the consumer. The EU supports organic production in the "Farm to Fork" strategy: the goal set by 2030 is a significant increase in organic aquaculture and a 50% reduction in the use of antimicrobials in aquaculture. Even these objectives are, to date, already achieved by Italian mussel farming, regardless of whether it is organic or not. For this reason, more and more mussel farming companies have obtained or are attempting to obtain the BIO brand, a brand that in the eyes of the consumer is often a guarantee of quality. Only in Emilia Romagna about 50% of companies have the organic certification. In Croatia, on the other hand, the sector of BIO farming of seabream and seabass is already quite established: based on Eurostat, the volume of BIO production was 280 tons in 2020, the level of production has been relatively stable over the last years (2015-2020). Main species are seabream (52%), seabass (36%) and mussels (13%) (Table 7).

Species	2015	2016	2017	2018	2019	2020
Gilthead seabream	na	na	na	104	107	145
European seabass	120	55	80	121	125	100
Mussel	na	na	na	60	59	35
Total	300	100	135	285	291	280

na: not available
Source: EUROSTAT

Table 7 - Volume of organic aquaculture production in Croatia between 2015 and 2020

CHAPTER 4: FINAL CONSIDERATIONS OF THE REGULATORY COMPARATIVE REPORTING PROCESS BETWEEN ITALY AND CROATIA - FISHERIES AND AQUACULTURE

The Comparison Report between the Italian and Croatian legal systems in the fisheries and aquaculture sectors was fundamental for outlining the tools available to the two governments in a future planning perspective and for tackling the difficult common challenges that will arise in the light of the current geopolitical situation of the community. The attitude of the Croatian legislator is dynamic in the phase of transposition and application of EU legislation within its legal system. A condition almost dictated by the need to optimize times with a view to harmonizing the national regulatory context of the sector, on the threshold of the new EMFAF European Programming.

The new regulatory system guarantees precise and necessary interventions for the proper functioning of the administrative and bureaucratic apparatus, with a view to simplifying the application processes of EU legislation itself.

Croatia, legally, has elasticized a part of its regulatory system ensuring a gradual reception of EU y legislation, minimizing the traumas of change and at the same time making substantial changes to the strategic sectors of fisheries and aquaculture.

It therefore appears evident that the last decade has been fundamental for Croatia in terms of structural and regulatory harmonization of the sector through, as previously underlined, a gradual and targeted legislative intervention aimed at introducing the community parameters set by the CFP. A change of gear which, according to recent data on the Croatian coastal economy, encourages more and more foreign investors in shipbuilding and local sustainable tourism.

On the Italian side, the legislator has launched a virtuous programming process, in which there is trust on the part of the various actors, especially within the framework of the EMFAF 2021/2027 programming. The EU itself has expressed positive judgments on the programming approach used, above all through the preparation of multi-year management plans, considered a challenge for the world of research and sector associations, precisely because they required a concrete exercise of knowledge integration and skills. The same gradual evolution towards an ecosystem approach was the result of a profound strategic innovation for scientific research in coordination with the central administrative structure. A difference persists between the two legal systems based on objective distant geographical characteristics. For the Italian situation, in fact, in the sectoral organization the main problem is that relating to the geographical stratification in multiple GSA (Geographical sub-areas) as defined in the resolution FAO/GFCM/33/2009/2, which determines the existence of innumerable technical/productive microcosms, whose work is in any case efficient in response to the directives of the central administrative system. With regard to the reception of Community legislation, as we have underlined in the other chapters of the Report, in order

to determine the state of affairs, both in Italy and in Croatia, it is necessary to focus on the two-year period 2020/2022 with reference to the COVID-19 emergency and the impact it has had on the reception and programming processes of the higher standard.

Indeed, fisheries and aquaculture were among the hardest hit sectors, as demand suffered a sudden drop. In view of this, the European Commission has proposed a series of temporary and targeted measures to address the crisis in the sector due to the pandemic. In terms of financial support, in fact, among the measures adopted at EU level to support the economy of the Member States, changes of a general nature have been introduced in favor of businesses (such as the deferral of the payment of taxes or support for layoffs in all sectors), which did not fall within the scope of the State aid rules.

In this sense, the role of the National Network of FLAGs was fundamental for the Italian system. The FLAG Network continued to guarantee its technical support, organizing periodic meetings aimed at solving operational problems and supporting the remodeling of Community Led Local Development (CLLD) in order to introduce directly directed interventions to support stakeholders affected by the crisis.

With regards to aquaculture, its key role in the two states is affirmed. The sector is in expansion thanks to the convincing EU policies aimed at increasing production, developing new types of farming that respect the environment as much as possible, minimizing the impact and certifying production with sustainability brands such as BIO and ASC.

Also in this case, as for fishing, the Croatian legislation was born and evolved by applying the European directives from the very beginning. The transposition was therefore harmonious. The problem for Croatia was moving from a poorly regulated sector to one that fully applied European directives. This has led to great difficulties for local producers who have had to adapt, especially as regards exports to other Member States, to very stringent rules on the use of antibiotics, the use of feed, environmental protection, labeling, permit granting and traceability.

As far as Italy is concerned, on the other hand, the European legislation was applied with longer times, since the Italian one is a more complete legislation and which had to be modified in the parts concerning the critical issues highlighted by the EU.

As reported in previous parts of the report, we are however talking about reassuring numbers for Italy both in terms of investment and production. We confirm that the possibilities highlighted in the next EMFAF programming 2021-2027 are a clear sign of continuity to the sector by the EU legislator.

Interpreting the data present in the study, the decisive role of fishing and aquaculture in the Italian and Croatian economies and society becomes evident. The interventions of the two national legislators express the sensitivity that the two legal systems direct towards two sectors, which, despite recording periodic declines in terms of economic substance, nonetheless remain decisive for the socio-economic balance of the coastal areas.

In the light of the regulatory comparative analysis of the two systems and in consideration of the post-pandemic reaction terms of both economies, we can therefore define that the community standardization process of the two states being analyzed is to be considered at an advanced level with respect to the post-pandemic uncertainties CFP reform in the periods between 2014-2017. The support of the peripheral administrations towards the central administrations of the respective states remains fundamental, so that a common and collaborative vision is fundamental for guaranteeing planning, stability, innovation and sustainable development for the sector.

The constant monitoring of the scientific and economic data of the sector will also be fundamental to be able to clearly define whether Italy and Croatia could really acquire a fundamental role for marine policies in the Euro-Mediterranean area in the next decade.

CHAPTER 5: SITOGRAPHY

ITALY

- [Piano Strategico per l'Acquacoltura Italiana 2021-2027](#)
- <https://www.europarl.europa.eu/factsheets/it/home>
- https://www.europarl.europa.eu/doceo/document/A-8-2017-0221_EN.html
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CROATIA

- <https://ribarstvo.mps.hr/default.aspx?id=91>
- https://narodne-novine.nn.hr/clanci/sluzbeni/2020_12_144_2765.html
- https://oceans-and-fisheries.ec.europa.eu/system/files/2020-09/2019-fleet-capacity-report-croatia_en.pdf

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