

WADDEN SEA FORUM

THEMATIC GROUP FISHERIES

Meeting TG-F-3

Cuxhaven, 8-9 September 2003

FINAL MINUTES

1. Opening

Documents: TG-F-3-1-1 Draft Agenda
TG-F-3-1-2: Composition of all Thematic Groups

The participants were welcomed at the IHK Stade by Mr. Werwath. The agenda was adopted and is in **Annex 1**. A list of participants is in **Annex 2**.

2. Adoption Minutes TG-2

Document: TG-2 joint workshop report, agenda item 7.3

The meeting adopted the report of TG-2 (Assen, 24 June 2003) which is contained in the report of the joint TG-2 workshop.

3. Announcements

There were no announcements.

4. Brief evaluation joint workshop TG2

Document: TG-2 joint workshop report

The draft workshop report was distributed by e-mail on 9 July 2003. The meeting is invited to discuss the outcome of the workshop in general terms and from a fisheries-specific viewpoint.

5. Brief introduction to finalized external studies (socio-economy D, DK; policy)

The secretary briefly informed the meeting about external studies carried out in the framework of the WSF project. Socio-economic analyses for Germany and Denmark were almost finished, as well as an analysis of policy and management instruments. As soon as these studies have been finalized they will be placed on the WSF website and the members informed by e-mail newsletter. A study into sustainable development has recently been initiated and is expected to be presented in draft form at the WSF-3 meeting (30-31 October 2003).

Ms. Gubernator informed that a study about the socio-economic situation of coastal fisheries in Lower Saxony had been commissioned by the Lower-Saxonian Ministry for Agriculture.

6./7. Draft generic scenarios

Document: TG-3-6-1 : First draft generic scenarios

Mr. Römgens informed the meeting how the draft generic scenarios had been developed and introduced the procedure for discussing the generic scenarios. The aim of discussing the generic scenarios was to collect comments on plausibility and completeness and to provide suggestions for improvement. At the meeting of TG chairs of 27 August it had been agreed to discuss comments

made by all TGs and to discuss these at the chair meeting and to decide, on the basis of this discussion, which amendments would be made to the generic scenarios.

The participants remarked that in all worlds there will always be a global and a regional market (Is it possible to have a regional market only?). It was furthermore underlined that shrimps and shellfish are not a basic food product but a luxury article. The term “soft mobility” was raised in relation to the identity of the region. The quality of seawater was mentioned as an important parameter (f.e. as related to high mobility). In the discussion about each separate world it became clear that four elements were particularly relevant for the fisheries sectors. These were

- Environmental rules and regulations
- Food quality and awareness
- The economic situation of the sector
- User conflicts

More in particular, the following remarks were made for the different worlds:

Cautious world

This world seems not to be very liveable, but there will probably be progress in social and ecological issues. The “great successes” of the EU should be made more explicit (what do they mean at the local level?).

Future unlimited

The basis for this scenario should be improved (compare p.5 2nd paragraph). Worldwide changes have probably been more important. How about education? How high is the percentage of “poor working class people”?

In this world there will probably be more appreciation for pristine areas.

Satisfied citizens

How can labour be competitive in this world?

Is “satisfied” not in contradiction with competition in this world?

Will there be trade restrictions?

The question was raised how economic growth is valued. In the scenarios the classical definition of increase in GDP had been used, but maybe other values should be included (f.e. quality of the environment).

Challenging world

There will be innovation in some sectors only; High tech does not fit it is imported tech only.

“Powerless EU” is a better term than “weak EU”.

How about mobility in this world: is “community oriented” compatible with high mobility?

Positive choice for locally produced goods not logical in a world where demand is based upon availability.

8. Discussion specific trends

Mr. Römgens underlined that the central aim of this TG was to discuss the position of the fisheries sector in each of the four future worlds. The outcome of the discussion would be used as the basis for drafting sector specific scenarios.

It was agreed to investigate the position of the sector on the basis of the following questions/issues:

- Environmental rules and regulations
- Food quality and awareness
- The economic situation of the sector
- Conflicts with other uses
- Opportunities and threats.

Below the outcome of this investigation is briefly summarized for each of the worlds. An overview is in the matrix in **Annex 3**.

Challenging world

Nature protection. There will be more differences in national rules and regulations than today. The implementation of policies will be fitted to local conditions.

Food. Probably more demand for fresh products. High diversity of products from very cheap to very expensive. Markets will be regional and comparable with today’s situation.

Economic situation. Problematic because shellfish and shrimps are luxury products. The markets are local and regional. Boats are smaller with less people on board. There is a high degree of specialisation in order to survive.

User Conflicts. Less conflicts than today because no investments in big infrastructure projects (wind turbines, harbours etc.). No spatial conflicts expected. On the other hand more problems may be

expected with existing structures of which the safety situation is bad. Also potential for disasters with tankers higher because of bad enforcement international rules and regulations.

Opportunities. Good for technological innovation. Opportunities for small boats, aquaculture and fresh specialized products. Local acceptance of small-scale fisheries.

Threats. Fish too expensive for many people. Growing "black" market and fishing without a license, i.e. false competition. Local opposition against large-scale fisheries.

Future unlimited

Nature protection. Because of economic growth there will be pressure on nature. On the other hand, there will also be money to protect nature. The EU will set framework conditions which will be specified at regional and local level with high participation of stakeholders. There will be many options for technical solutions.

Food. High demand, high quality, fresh market, imports worldwide, variety, diversity.

User conflicts. Many conflicts about space. Pressure from other sectors (tourism, nature conservation). There will be a dialogue between interest groups: bottom-up process to solve problems. Co-management.

Economic situation. Stable. More new ships. Concentration, some big players, niche markets, specialisation, social problems (f.e. follow-up), expensive production, fierce global competition between a few big players.

Opportunities. Niche markets, Wadden Sea related products for tourists, New farming techniques: New cultures, new species, aqua farming (also inland). Small processing facilities for specialized niche markets.

Threats. Expensive production methods. Difficult to start new initiatives. Global competition. More vulnerable. Not enough government support.

Cautious world

Nature protection. Bureaucratic and top-down. Strong nature protection regulations. Less opportunities for technical solutions. There will hardly be EU money for nature protection. There will be little public support for nature protection (because top-down and bad economic situation).

Food. Big demand for cheap frozen products. Small market for niche products. Decreased demand for fresh products by Wadden Sea tourists.

Economic situation. Old fleet. Declining fisheries. Lower living standard fishermen. Few big players. Strictly regulated. Fierce competition. Shift of activities to North Sea (easier to fish : shrimps)

Conflicts. Weak position fisheries (although some support from local government).

Opportunities. ?

Threats. Hard to keep up the standards (ship quality, technology, fish quality). Subsidies will probably go the new member states. Ship building and repair to Eastern Europe. No future for Wadden Sea fisheries.

Satisfied citizens

Nature protection. Strong national nature protection regulations. Strong trilateral cooperation. Nature protection in general weaker than today.

Food. Growing niche markets; High quality; Bigger demand; Traditional products; „Real fresh“: processing in the region: "Wadden Sea products".

Economic situation. Growth not as high as in "Future unlimited"; Most profits to big players?

Advantages for small units; Most stable situation.

User conflicts. Shipping dangers less? Pragmatic/practical solutions to conflicts. With regard to spatial conflicts tendency towards zonation of uses.

Opportunities. Good for small players. Touristic chances. Identity positive; socially positive.

Threats. Low innovation. Not competitive for the future (satisfaction is a danger). Vulnerable to catastrophes.

The meeting then discussed possibilities for technological innovations. It was stated that fishing in the Wadden Sea is a highly specialized branch and that most technical possibilities have been tried. In the coming 20 years no substantial innovations are expected, unless fisheries leave the Wadden Sea. It was stressed that innovation is a step-by-step process and that large breakthroughs are not to be expected. In fish catch, improvements were considered necessary in reducing bycatch and efficiency increase. Also management improvements must be considered, for example stock management. More possibilities were expected in the processing of shrimps and shellfish. For shrimps, peeling is possible in the area (peeling machines) but this is currently a consumer's problem because the process is not yet perfect. Other possibilities are machines to open cockles. Furthermore innovations in product hygiene were expected, for example the development of automatic toxin screening methods.

However, more basic research is needed before such techniques will be market-ripe.

9. Procedure further development scenarios

The meeting was informed that, on the basis of the outcome of the discussion under agenda item 8, the drafting team would elaborate draft specific scenarios. These would be discussed at TG-4. The following members "volunteered" to comments first drafts of the specific scenarios: Hans Revier, Jaap Holstein and Andre de Leeuw.

The most important issue for TG-4 will be the development and testing of sector specific strategies. Ben Römgens explained that strategies comprise the following:

- Official rules and regulations
- Management (by the sector)
- New products
- New markets
- Research and development needed for implementation new technologies.

It was **agreed** that the members would prepare draft strategies to be submitted to the secretariat preferably before 13 October.

It was stressed that the draft strategies should not contain a listing of official rules and regulations but contain an overview of those rules and regulations most relevant for the desired strategy (in terms of hindering new strategies or needed for new strategies).

10. Any other business

There was no any other business.

11. Next meetings

The fourth meeting of TG Fisheries is scheduled for 9-10 December 2003. Ms. Lübke invited the meeting to come to Husum and this invitation was accepted.

The meeting furthermore agreed to schedule the fifth and last meeting of TG Fisheries for 2-3 March 2004 in Harlingen (NL).

12. Closing

The meeting was closed on Tuesday 9 September 13:00 hours. The chairman, Mr. Holstein, thanked the participants for a fruitful discussion and in particular Mr. Werwath for hosting the meeting. He also thanked Mr. Schmidt, director of the Cuxhaven fish processing industry „ Kutterfisch-Zentrale GmbH" for hosting the second day of the meeting and for guiding the participants through the premises of his firm.

Annex 1

Wadden Sea Forum Thematic Group Fisheries

3rd meeting

AGENDA

- 1. Opening**
- 2. Adoption Minutes TG-2**
- 3. Announcements**
- 4. Brief evaluation joint workshop TG2**
- 5. Brief introduction to finalized external studies (socio-economy D, DK; policy)**
- 6. Introduction to development draft scenarios**
- 7. Discussion draft scenarios**
- 8. Discussion specific trends**
- 9. Procedure further development scenarios**
- 10. Any other business**
- 11. Next meetings**
- 12. Closing**

TG-Fisheries-3. Draft Minutes. Annex 3

	Cautious world	Future unlimited	Satisfied Citizen	Challenging world
Environmental/ Natureprotection rules and regulations	<ul style="list-style-type: none"> ○ Bureaucratic EU. ○ Top-down approach ○ No national differences 	<ul style="list-style-type: none"> ○ EU sets framework ○ Regional implementation ○ Bottom-up ○ Technical solutions 	<ul style="list-style-type: none"> ○ Strong trilateral cooperation ○ Weaker nature protection 	<ul style="list-style-type: none"> ○ No international policy ○ Regional rules ○ More differences between nations than today
Economic situation	<ul style="list-style-type: none"> ○ Few big companies ○ No more fishing in the Wadden Sea? 	<ul style="list-style-type: none"> ○ Few big players ○ Social problems ○ More new ships 	<ul style="list-style-type: none"> ○ Growing market ○ Processing in the region ○ Stable situation 	<ul style="list-style-type: none"> ○ More competition ○ Black market ○ Small scale
Food awareness/ products	<ul style="list-style-type: none"> ○ High demand for cheap (frozen) food ○ Small market for niche products 	<ul style="list-style-type: none"> ○ High quality fresh market ○ Much variety and diversity ○ World-wide import 	<ul style="list-style-type: none"> ○ Growing market for high quality traditional products 	<ul style="list-style-type: none"> ○ More fresh products ○ High diversity of products and prices (cheap-expensive)
Conflicts with other uses	<ul style="list-style-type: none"> ○ Strong nature protection regulations and high demands to quality (hygiene) + global competition may make Wadden Sea fishing unprofitable 	<ul style="list-style-type: none"> ○ More Spatial conflicts ○ Dialogue between users ○ Regional solutions ○ Coalitions between sectors 	<ul style="list-style-type: none"> ○ Pragmatic solutions to spatial conflicts, probably more zonation ○ No technical solutions 	<ul style="list-style-type: none"> ○ Unreliable government ○ Higher shipping risks
Opportunities and threats	<ul style="list-style-type: none"> ○ Opportunities: ? ○ Threats: See above 	<ul style="list-style-type: none"> ○ Opportunities: Niche markets, new cultures. ○ Threats: Global competition, High starting costs, vulnerable and expensive production 	<ul style="list-style-type: none"> ○ Opportunities: Good for small players, touristic chances, identity. ○ Threats: low innovation makes sector vulnerable to future changes 	<ul style="list-style-type: none"> ○ Opportunities: With high innovation also possibilities for smaller boats, new farming techniques. ○ Threats: Fish becomes expensive, black fishing