

**Malta's National Strategic Plan
For Fisheries
2007-2013**

Table of contents

	Page
List of Abbreviations	3
1. Introduction	4
2. The Maltese fisheries sector	5
• 2.1 General description	5
• 2.2 Landings	8
• 2.3 Landing sites	9
• 2.4 Fleet	10
• 2.5 Aquaculture	12
• 2.6 Post-harvest use	13
• 2.7 Leisure fisheries	13
• 2.8 Aid to fisheries	14
• 2.9 Research	14
3. SWOT analysis of the Maltese fishing sector	16
• 3.1 Strengths	16
• 3.2 Weaknesses	18
• 3.3 Opportunities	20
• 3.4 Threats	21
4. Priorities and Objectives for the sustainable development of the Maltese Fisheries Sector	25
• 4.1 Development of the fleet	25
• 4.2 Development of Aquaculture	27
• 4.3 Development of the processing and marketing sectors	29
• 4.4 Development of fisheries' infrastructure	30
• 4.5 Sustainable development of fisheries' areas	31
• 4.6 Improving competitiveness in the fisheries sector	32
• 4.7 Control and monitoring	33
• 4.8 Data Collection Programme	36
5. Resources for the Implementation of the National Strategy	39
6. Procedure for the development, implementation and monitoring of the National Strategic Plan	40
• 6.1. The Managing Authority	42
• 6.2. The Certifying Authority	43
• 6.3. The Audit Authority	43
• 6.4 The Monitoring Committee	43

7. Annexes	45
• Annex I - Farmed Fish 2003 – 2005	45
• Annex II Imports and Exports 2003 - 2005	46
(i) Imports	46
(ii) Exports	46
• Annex III. Fisheries data	47
(i) Supply of Fish	47
(ii) Employment	47
(iii) Landings 2003 -2005	49
• Annex IV: Locations of the main Maltese fishing ports and sites	52
• Annex V - Fleet Data	53
(i) Distribution of vessels (MFA & MFB) according to main gear	53
(ii) Distribution of MFA & MFB vessels according to geographical area	54
(iii) Distribution of MFA & MFB vessels according to length	55
• Annex VI. General geographic and economic data	56
• Annex VII : General legal framework	57

List of Abbreviations	
AFM	Armed Forces of Malta
BFT	Blue fin tuna
FAD	Fish-aggregating devices
FAB	Fisheries and Aquaculture Branch
FMAS	Fish Market Accounting System
FMC	Fisheries Monitoring Centre
FPO	Fisheries Protection Officer
MAPA	Malta aquaculture producers' association
MEPA	Malta Environment and Planning Authority
OPM	Office of the Prim Minister
VMS	Vessel Monitoring System

1. Introduction

The Maltese National Strategic Plan describes the current situation in the fisheries sector and establishes the overall aims and objectives for the development of the Maltese fisheries sector for the period 2007-2013. This document has been drawn up taking into consideration:

- Council Regulation (EC) 1198/2006 on the European Fisheries Fund
- Council Regulation (EC) 861/2006 establishing Community financial measures for the implementation of the common fisheries policy and in the area of the law of the sea
- Council Regulation (EC) 2371/2002 on the conservation and sustainable exploitation of fisheries resources under the Common Fisheries Policy
- Council Regulation (EC) 813/2004 amending Regulation (EC) No 1626/94 as regards certain conservation measures relating to waters around Malta
- Communication (COM/2002/511) from the Commission to the Council and the European Parliament – Strategy for sustainable development of European aquaculture
- Commission working documents concerning the National Strategic Plan.

Furthermore, consideration was also taken of the proposed Regulations concerning management measures for the sustainable exploitation of fisheries resources in the Mediterranean Sea and on electronic recording and reporting systems and the new Data Collection Regulation. The plan is consistent with the objectives of the Lisbon strategy.

2. The Maltese fisheries sector

2.1. General description

Maltese capture fisheries are mainly of a typical Mediterranean artisanal type and are not species selective. They are frequently described as multi-species and multi-gear fisheries, with fishers switching from one gear to another several times throughout the year. There are no inland fisheries in Malta.

The Maltese fishing industry is small, by local and international standards, and its economic contribution to the national economy is negligible, accounting for 4 million Maltese Liri. The average value of catches is around 0.10 percent of the Malta's Gross Domestic Product (GDP), with the industry's direct contribution to GDP estimated at around two-thirds of this figure when the cost of imported inputs, particularly fuel, is considered.

The proportion of the working population dependant, to varying extents, on this industry for its livelihood, is around 1.0 percent. The fisheries industry provides direct employment to around 1400 people in the primary and secondary sectors including aquaculture. The estimated numbers of full-time and part-time professional fishers (2004) are 455 and 848 respectively with less than 1 percent being females. The aquaculture industry employs 84 full-time and 22 part-time persons who include technical / scientific experts, farm managers, farm operators, divers and maintenance staff.

From an international perspective, the value of the annual fish catch in Malta is around 0.07 percent that of the European Union (EU), while total employment, including full-time, part-time and seasonal employment, is around 0.4 percent of the EU total in the sector.

The local consumption of capture fisheries products is heavily supplemented by locally farmed fish imported chilled and frozen fish products, as well as processed imported fish products. The consumption of fish products (excluding canned and other processed products) per capita per annum is estimated at 6.58kg. Malta's trade balance in fisheries products is negative at 1.2 million €, excluding the value-added of tuna from farming. Figures for the years 2003 to 2005 on farmed fish, imported chilled and frozen fish products are provided at Annexes I and II

However, this sector is of a much greater social and cultural importance than the above figures imply. The livelihood of most of the local fishers depends on the sale of highly prized species which are available to the consumer as fresh fish of highest quality. The variety and quality of these fish species also give a significant contribution to the important tourism industry since local restaurants boast of high quality seafood which together with the colourful traditional fishing vessels are significant attractions to the tourists visiting Malta. Tourism is one of the key areas of Maltese economy activity, generating around one-fourth of the economy's output and employment. Surveys of visitors to Malta have repeatedly placed a high value on culture as expressed in its artisanal crafts as a prime tourist attraction. The fishing industry is one of the more important artisanal crafts that have survived to an appreciable extent. Its contribution to the tourist industry is in keeping with the on-going efforts to diversify away from the highly seasonal, typically lower income, "sun and sea" tourists and to attract upper market tourists through cultural activities. Major fishing villages around the Maltese Islands, namely Marsaxlokk, are attractions for both locals and tourists due to their picturesque characteristics and on-going artisanal activities related to fishing. Furthermore, small base ports, although smaller in contribution from a fleet or landings value point of view, are considered just as important as they enhance the rural environment and form part of the mosaic that builds Malta as a favourable tourist destination.

The Fisheries and Aquaculture Branch of the Veterinary Affairs and Fisheries Division within the Ministry for Rural Affairs and the Environment is

responsible for the management and regulation of the fishing and aquaculture industries. The main goal of the Branch is to implement sound fisheries management, ensuring the sustainability of living marine resources. In particular, the management of the unique Maltese 25-mile Fisheries Management Zone is of highest priority for the effective conservation of local and sub-regional fisheries resources.

The setup of the Fisheries Board, as provided for by Article 5 of the Fisheries Conservation and Management Act CAP 425, is made of members representing various sectors involved in fisheries management, such as, commercial and recreational fishermen, fish market traders, fish retailers, Department for the Protection of the Environment and the Armed Forces. The Board is chaired by the Director responsible for fisheries conservation and control.

All professional fishers in Malta are organised into two fishers' cooperatives: "Koperattiva Nazzjonali tas-Sajd" and "Ghaqda Koperattiva tas-Sajd Ltd.". These cooperatives offer various services to all professional and part-time fishers, such as fish sales (including exports), supply of flake ice, fishing tackle, bait and accessories, cold storage, insurance coverage, fish crate services and facilities for packing and processing of fish. It is envisaged that these fishers' organisations may assume the role of Producer Organisations in the future.

A number of associations of recreational fishers exist around the various ports. These associations are amalgamated to form a federation 'Federazzjoni Ghaqda Dilettanti tas-Sajd'.

The Malta Aquaculture Producers' Association (MAPA) was setup in 1997 and represents aquaculture producers in Malta. MAPA is represented on the Fisheries Board and serves as a liaison between government and individual producers especially in formulating policies and strategies in aquaculture. The Association

serves as a focal point where producers may air their views and put forward recommendations for the benefit of the industry.

Recently the Association has extended membership to tuna penning operators, who although do not operate in a strict aquaculture environment, felt the need to be represented by the Association.

2.2. Landings

Landings from marine capture fisheries are dominated by tuna, lampuki (dolphin fish) and swordfish in decreasing order of importance. Over 65 percent of the annual landings (about 1000 tonnes) originate from the tuna and dolphin fish fisheries and contribute to almost 56 percent of the value of annual landings (about €2.6 million). The actual percentage attributed to any one of these three species depends on the actual volume of landings and market price for each particular species in a given period. The price of lampuki and swordfish varies enormously and the percentage importance attributed to them will therefore change in different time periods. Annex III (iii) demonstrates the amounts of landings by species for the period 2003 to 2005 in descending order of the average volume with corresponding values in both the Maltese lira and Euro equivalent.

Between the months of April and July the market is dominated by landings of bluefin tuna with swordfish being the second most available species. Both these species are targeted by the same method i.e. pelagic drifting longlines although a pilot BFT purse-seine fishery exists.

Landings of lampuki occur mainly between August and December mostly by the FAD fishery, but the season can be extended into January when unfavourable weather conditions occur during the initial part of the season. Other major species associated with the dolphin fish fishery are pilot fish and amberjack, which are caught as secondary species found in considerable concentrations under FADs.

Swordfish is the third most landed species annually in terms of weight and it is the only species with landings of more than 1 Metric Tonne for each month of the year. It is targeted throughout the year, albeit in varying degrees and for different reasons. During the winter months (December - April) the bottom longline sector of the fleet target lucrative demersal species prior to reverting to tuna longlining which catches swordfish and albacore as a secondary species. The peak fishing period for swordfish is between May and August.

Landings of small gregarious pelagic and demersal species are generally not seasonal except in the case of mackerel. The species in these groups are landed in quantities of less than 5 Metric Tonnes per month. Bogue is the most landed small pelagic species, and is caught mostly by traditional traps made out of cane strips, followed by mackerel. The landings of prawns originate exclusively from trawling which takes place throughout the year with quantities decreasing in winter months due to unfavourable weather. Landings of other demersal species originate from trawling, longlining and fixed net operations.

The magnitude of landings and fishing patterns remain quite stable throughout the years varying in function in accordance with weather conditions and other natural causes.

2.3. Landing sites

The main fishing port in Malta is Marsaxlokk Harbour which lies to the south east of the island. About 40 percent of the vessels registered in Malta operate from the fishing village of Marsaxlokk.

The most important fishing port on the island of Gozo is Mgarr Harbour, where over 70 percent of this island's fleet berth. This port is also the second largest in terms of number of fishing boats for the whole of the Maltese Islands. The trend for

vessels berthing in this port appears to be shifting towards an increase in small scale coastal vessels with a decrease in the number of vessels over 12m.

The other larger ports are well distributed geographically around Malta. In order of importance they are: St. Paul's Bay in the north, Marsascala and Msida on the east coast, while the landing place of Gnejna, located conveniently amidst the cliffs of the western coast, caters for the fishers from Mgarr (Malta) and Rabat.

The number of active vessels varies according to season, with minor ports having practically no active vessels during the winter months with as little as 25 percent of registered vessels in major ports landing fish in this period.

The locations of all the Maltese fishing ports are included in Annex IV.

2.4. Fleet

At the end of December 2005, the Maltese Fishing Fleet Register was composed of 2251 registered fishing vessels of which 19% were commercial full-time vessels, 44% commercial part-time vessels while the remaining 37% were recreational vessels. The total gross tonnage and power (main engine) for the full-time commercial vessels were 16769.48 GT and 55052.47 kW respectively, whilst for the part-time commercial vessels the values were 2194.36 GT and 47092.44 kW (according to the Annual report 2005 of MS efforts to achieve a sustainable balance between fishing capacity and fishing opportunities).¹ The recreational category vessels operate only recreational fishing gear and their catches cannot be commercialised.

The length of registered vessels operating in the Mediterranean ranges from 3 to 37.7 m. The average size of the Maltese fishing vessels is well under 10m in length, with the exception of the trawler type class, using exclusively bottom otter trawls,

¹The difference in total tonnage reported in the NSP against that reported in the CFR at the end of 2005 is due to the re-measurement of vessels over 17 metres and in view of changes that have taken place in the Register.

averaging 22.5m. The fleet operates predominantly in a small scale artisanal manner with half the fleet composed of vessels of a traditional type: *luzzu*, *kajjik* and *firilla*. Another 35 percent of the fleet is composed of *Multi-Purpose Vessels* (MPV) and are a relatively recent addition to the fleet.

The main engine power of the traditional vessel classes and other derivatives is generally very low, but the MPV class has a higher average power reflecting the larger size and different hull structure composed of fibreglass instead of the more traditional wood. The average main engine power of the trawler class is, as expected, very much higher than that of the other vessel types, but is relatively low for the kind of fishing operations they are often engaged in (e.g. trawling for prawns at 800m depth). At the end of 2005, the distant-water fleet was comprised of only of two vessels with a total 7569 GT which contributed 46 % of the fishing capacity included in the Fishing Vessel Register. Apart from the revenue arising from their licensing fees, these two vessels and their landings do not contribute to the socio-economic benefits of the Maltese fisheries sector. Such vessels do not contribute to the landings and marketing of fish, employment of fishers, repairs of vessels in the Maltese islands. In future it may be possible that the capacity of these two vessels be used by a number of smaller vessels.

The main gear used by the Maltese fishing fleet is various forms of “hooks and lines” (over 60 %). Different types of “gillnets and entangling nets” are also popular (20%) whilst traps make up over 10% of the registered main gear.

Apart from their registered normal fishing activity, up to 130 vessels (over 6m in length) also participate in the traditional dolphin fish (*Coryphaena hippurus*) or *lampuki* fishery utilising Fish Aggregating Devices (FADs). Aggregated dolphin fish and other species such as pilot fish (*Naucrates ductor*) and amberjack (*Seriola dumerili*) are caught by a surrounding net similar to a purse-seine but without a purse line.

The recreational fishing sector in Malta can be divided into two classes. The major one comprises vessels (total 826 vessels) which are registered in the national fishing fleet register and are classified as non commercial 'Category C' vessels. The second class of vessels engaged in recreational fishing is registered in the National Sports (small ships) Maritime Register.

The data on the commercial fishing fleet distributed by the two main categories, that is (MFA) full-time and (MFB) part-time, together with the fishing utilised and their geographic distribution and length classes is illustrated in Annex V. It has to be pointed out that the data conveys a classification based on the first gear registered for each vessel. In actual fact each vessel has three or four registered gears and shifting from one gear to another takes place according to the season.

2.5. Aquaculture

The aquaculture industry in Malta started in the late 1980's with the culture of marine finfish in offshore cages. The annual aquaculture production increased dramatically during the 1990's from 60 tonnes in 1991 to a peak of 2300 tonnes in 1999. This was composed mainly of sea bream and sea bass and was produced through the operation of 4 commercial farms. By the year 2000, production dropped to about 1000 tonnes with most farms switching to tuna penning operations due to a fall in prices for sea bass and sea bream. The market for these species is expanding once again. Current annual production stands at around 1000 tonnes, valued at about \$6 million, and this is expected to continue increasing in the coming years. Maltese aquaculture produce is almost entirely exported to European and Asian markets.

There are no commercial marine hatcheries in Malta and fingerlings are imported from hatcheries in other Member States. However, the wet lab facilities at the FAB include a pilot marine hatchery.

The production of Bluefin tuna (*Thunnus thynnus*) through penning has been increasing over the past few years. The fattening of this species around the Maltese islands started in the year 2000 with one farm producing 300 tonnes. Production reached a peak of 3550 tonnes in 2003 with four farms in operation. However, Malta is aiming to continue increasing the volume of this production. The live tuna are exclusively imported from foreign purse seiners fishing in the Mediterranean. Once harvested, the fattened fish are re-exported mainly to Asian markets.

2.6. Post harvest use

Capture fisheries products are generally consumed as fresh fish by locals and the tourist trade. However, the majority of bluefin tuna and an increasing percentage of swordfish caught by Maltese longliners are exported or despatched to foreign markets. A large percentage of the local aquaculture finfish products are dispatched to other European markets.

The fish processing industry in Malta is small and there is no utilisation of fish-derived by-products, with the exception of some processing of remains that are utilised as pet food. The pellet feed used for finfish farming is totally imported from EU countries, while bait fish used for penned tuna feeding is mainly imported, supplemented by a few tonnes of locally caught small pelagic fish species such as mackerel.

2.7. Leisure fisheries

The recreational fishing sector in Malta is an important one. It is organised into different organisations. The organisations of recreational fishing boat owners and sport fishermen form the 'Federazzjoni Ghaqda Dilettanti tas-Sajd'. A number of sport fishing tackle outlets also organise associations of sport anglers. Sport gear does not require a licence from the Veterinary Affairs and Fisheries Division.

Commercial recreational sport fishing is also developing rapidly and is considered as one of the avenues of diversification of tourism. Recreational fishing vessels are registered into 2 different registers. The majority are included in the Fishing Fleet register as non commercial Category C.

According to national legislation this category cannot practice any professional type of fishing operation and can only use minor fishing gear listed in the fishing gear regulations. These vessels are prohibited from using any net gear. A fishing vessel licence is issued to each vessel in “Category C” as in the case of commercial vessels.

Another group of vessels engaged in recreational fishing are only registered in the National Maritime Register and owners can only use sport fishing gear for which licenses are not required.

2.8. Aid to Fisheries

Prior to 2004, the Maltese fisheries capture sector benefited from grants amounting to 279,425 € over the 1990 – 2000 period under the Agriculture and Fishing Industries (Financial Assistance Act) Cap 146. Aquaculture development was included in preferential schemes under the Development Planning Act Cap 356 in the same period.

During the period 2004 – 2006, the Fisheries Conservation and Control Division implemented the Structural Funds Programme. The fishing sector received approximately €3.6 million through the Financial Instrument for Fisheries Guidance Programme, co-funded by the European Union and the Maltese Government.

2.9. Research

Malta Centre for Fisheries Sciences (MCFS) within the Fisheries and Aquaculture Branch is the institution responsible for the scientific monitoring and research

related to capture and culture fisheries. As European Union member state, Malta is obliged to conduct an annual National Fisheries Data Collection Programme in line with European Union regulations. The programme contributes to a better knowledge of the main fishery resources of Malta from the biological, managerial, economical and social points of view. MCFS also participates in various scientific activities of subsidiary bodies of the EU, General Fisheries Commission for the Mediterranean, the International Commission for the Conservation of Atlantic Tunas and other regional programmes such as COPEMED, MEDSUDMED and MEDFISIS of FAO. Currently, the MedSudMed project is fully financing a Pilot Study in Malta to map the fisheries demersal resources, the environmental factors and fishery activities in the area (GSA 15).

MCFS participates actively in three sub-regional research projects of the Food and Agriculture Organization of the United Nations: COPEMED (since 1998), on a project on Dolphinfish (*Coryphaena hippurus*) Fishery in Central-Western Mediterranean; MEDSUDMED (since 2002) in the “Assessment and Monitoring of the Fishery Resources and the Ecosystems in the Straits of Sicily”; and MedFISIS for the development of a fishery statistical system for the Mediterranean (funded by FAO and EU).

MCFS is a key partner of the European Union project “Reprodott” dealing with the reproduction and feasibility for the domestication of *Thunnus thynnus*. The Centre also carries out fish vaccination trials and monitoring of water quality around fish farms.

3. SWOT Analysis of the Maltese fishing sector

<p style="text-align: center;">Strengths</p> <ul style="list-style-type: none"> • Geographical position • 25 mile conservation zone • Tourism • Fisher versatility • Small size of the sector 	<p style="text-align: center;">Weaknesses</p> <ul style="list-style-type: none"> • Inadequate funding • Small size • Geophysical characteristics • Low fisher education • Human resources • Lack of alternative opportunities
<p style="text-align: center;">Opportunities</p> <ul style="list-style-type: none"> • Aquaculture • EU Membership • EU markets • Consumption of fisheries products • Scientific data • Tourism 	<p style="text-align: center;">Threats</p> <ul style="list-style-type: none"> • Geographical location • Fleet characteristics • Over fishing • Regional management practices • Regional enforcement and control • Environmental threats

3.1. Strengths

Geographical position: Malta's central Mediterranean location places it in on the migratory paths of the three highly Migratory Fish Stocks which contribute to the majority of catches sustaining the fishing sector. Consequently good fishing grounds are available from the West to the South East. This position in the centre of the Mediterranean also makes Malta strategically placed to attract tuna farming as it reduces transportation costs from all areas. This has been the basis underpinning the increase the undergoing development of aquaculture zones, both to the north as

well as to the south-east of Malta for the fattening of large pelagic species which will create new space for aquaculture, and which will permit the sites that are presently used for tuna farming to be utilised for the farming other finfish species.

Management of the 25 mile conservation zone: Malta has been managing this zone for over three decades and has maintained strict control over the number of vessels and their fishing gears which reflect the level of fishing opportunities available to fishers. There has been a ban on increasing trawling licences since 1996 while the lampuki fishery has been managed for over a hundred years. The effect of this management is that the stocks in Maltese waters are at healthy levels.

Tourism: The fisheries sector contributes indirectly to exports while tourism adds value to the product caught by the local fleet. One of the selling points of the Maltese touristic product is the picturesque nature of traditional seaside villages. Tourists also appreciate the availability of freshly caught fish cooked in the traditional way in the local seafood restaurants.

Fisher versatility: Maltese fishers are highly versatile. In the past they have been able to cope with new challenges and conditions such as those offered by aquaculture and many participate actively in this sector. This bodes well for the future of the sector which will have to face many new challenges especially those associated with the poor states of Mediterranean stocks and which will necessitate fishers to look for alternative opportunities.

The **small size of the sector** should make the practicalities of fisheries administration easier, including control, collection of data, etc. Malta's small coastline and surface area means that a smaller number of officials are required to perform the necessary monitoring.

3.2. Weaknesses

Inadequate funding: Malta's intention to participate in the Euro has meant that for the last few years Malta's economic and fiscal priorities have been focussed on meeting the Maastricht criteria and thus great importance has been given to reducing the government's deficit and debt and controlling inflation. This has meant that government spending has been prioritised to achieve budgetary discipline with resources directed to the most important national projects. As a result, the **fisheries** sector could not receive enough attention in terms of funding as it would have desired for its development. This will result in a limitation in the number of projects which the administration will be able to carry out and a limitation in the number of personnel which the fisheries administration could recruit. On the other hand private sector shows little interest in investing its funds in projects and research which results in a severe limitation in the size and number of projects. Furthermore, EU membership has increased the number of obligations which Malta has to meet, such as VMS, ERS and VTM, and which, though ultimately beneficial, are costly to implement.

Small size: The small size of the sector together with the small size of the internal market are obstacles to the accumulation of significant amounts of capital to be invested in technology, and which would reap benefits through economies of scale. This has resulted in a lack of investment in the sector (as in other sectors) which accounts for the low productivity of the catch sector: the average value of annual catches per employee in Malta is slightly over Lm800 (2,000 Euros), merely one-fifth the European Union average, which reflects the predominantly non-industrial, part-time nature of fishing activities in Malta based on artisanal methods. This average reflects collated data for both the full-time and part-time sector.

Geophysical characteristics: The oligotrophic nature of the waters around Malta results in low productivity and this prevents any great increase in fishing capacity.

The limited coastal sea areas available for farm site installations greatly restrict the expansion of the aquaculture industry and its viability. The lack of sheltered areas and the presence of deep waters off the Western coast render marine installations high risk and increase their operational costs.

Malta's geographical position results in increased costs of imported inputs and makes exports more expensive and less competitive.

The low level of education of fishers: will increase the difficulty in encouraging fishers to utilise high tech management such as electronic logbooks and to participate in institutionalised organisational activities (such as RACs).

Human resources: A previous Gaps Analysis report, had recommended the minimum human resource requirements for a Fisheries administration capable of meeting its obligations. Recruitment has however been slow and staff numbers have not reached this level and consequently the present staff is overstretched by local and EU duties.

Lack of alternative opportunities: The widely held principle of relative stability prevents the participation of Maltese vessels in established Fisheries Partnership Agreements. This limits the possibilities to transfer vessels to fish in waters covered by existing Agreements which would help to reduce the pressure on Mediterranean stocks. Furthermore, the artisanal nature of the Maltese fleet with the large majority of vessels of a size under 12m, means that it would be very difficult for them to adapt to fishing opportunities outside the Mediterranean.

Fisheries Infrastructure: The designated ports still lack some basic amenities necessary for the proper control of landings. Moreover, the Mediterranean Regulation has further increased the obligations with respect to landings of tuna, swordfish, trawled fish and *lampuki*. All catches of such species have now to be landed at designated ports. The present system of landing catches at various

landing sites and inspections held at Valletta's designated port, where the fish market is located, has to be replaced.

Facilities for buyers, sellers, inspectors and handlers of fish products at the existing fish market in Valletta are not optimal. Moreover, the existing fish market is located at a site at the Valletta Grand Harbour which is being developed to cater for the arrival of passengers from the cruise liner terminal. Relocation of the fish market has to be considered.

3.3. Opportunities

Aquaculture: Malta is currently undertaking to relocate its aquaculture installations further outwards to around 6.3 km from the shore. This will allow the number of fish farms to increase and it is estimated that production of farmed fish will increase to 15,000 Tonnes. This should permit the diversification of species away from the traditional seabass and seabream production and which should permit the tapping of new markets.

EU membership: has meant that Malta has had to adopt a number of measures especially with regards to fisheries control such as VMS and the use of logbooks and which have improved our control systems Through the European Fisheries Fund, Malta will have be able to modernize its fishing fleet, with regards to health, safety and hygiene considerations, purchase more selective fishing gear, and to monitor the interaction between the fishing operations, the environment and the living marine resources more efficiently.

The adoption of Council Regulation (EC) No 1967/2006 of 21 December 2006 concerning management measures for the sustainable exploitation of fishery resources in the Mediterranean Sea which incorporates numerous technical measures will improve the long tem sustainability of Mediterranean fish stocks and consequently of the fishing fleets targeting these stocks.

EU Markets: The marketing of fishery products could also expand as a result of EU membership especially if the Maltese catch is promoted within an “eco-labeled” niche market, fetching higher prices, as quality fresh fish caught by artisanal methods taken from within a strictly managed fishing zone.

Consumption of fisheries products: Fresh fish and other fisheries products form part of the national staple diet. The estimated consumption of fisheries products per capita is around 6.58kg per person per year. Though this is possibly an underestimation, an increase in the consumption of fisheries products could be achieved utilising good promotional campaigns.

Increased collection of scientific data with regards to the most important stocks will improve the scientific management of these stocks. The collection of increased scientific data from multi-lateral programmes will help to achieve this. The application of the ecosystem-based approach to fisheries management will also contribute to better fisheries management.

Tourism: Government policy to focus on niche markets such as sport fishing and diving will contribute to diversification of the tourist base and should also help to create alternative employment for fishers. Increased protection of marine habitats and the establishment of marine protected areas will enhance Malta’s status as a prime site to attract divers.

3.4. Threats

Geographical location: The Mediterranean Sea surrounding the Maltese Islands is a busy sea full of vessels transporting cargo and tourists which compete with fishing vessels. Competition between fishers, aquaculture operations, recreational vessels, sport, cruise liners and bunkering is greatest in the coastal band. The high level of shipping activity in the area also increases the likelihood

of accidental release of alien species hitching rides in ballast water or as hull water fouling. An example of this is the introduction of the North American comb jelly into the Black Sea through ships' ballast and which has now reached an estimated total biomass exceeding the world's total fish landings and contributed to the dire situation of fish stocks in this Sea.

Fleet characteristics: The Maltese fleet is old with an average age of 22.5 years. Unlike the case of the fleets of the other Mediterranean European Union Member States, which although by comparison may be just as old, may have gone extensive comprehensive overhauls rendering more competitive. Funds from the European Union have only been available for modernisation of the Maltese fleet since accession in 2004. This has rendered it less competitive and more costly to operate when compared with its counterparts. Furthermore, the artisanal nature of our fleet with over 80% of vessels being less than 12m does not allow them to compete with larger industrial vessels for the same resources and limits their choice of fishing grounds.

Over fishing: It has been established by ICCAT and GFCM that numerous important stocks in the Mediterranean especially of migratory species are fully exploited, and in the case of Blue fin over-exploited, and this does not bode well for the future. IUU fishing compounds this problem.

This has been reflected in the adoption of an ICCAT Recommendation establishing a multi-annual recovery plan for Blue fin tuna in the Eastern Atlantic and Mediterranean. This plan has established a 20% reduction of fishing quotas by 2010 to help this stock to recover. However, the decreasing fishing opportunities, especially for Blue fin tuna and swordfish, available to the Maltese fleet in the future will mean that the number of vessels targeting these fisheries will have to decrease either through decommissioning, or through transfer of capacity to different fisheries either in the Mediterranean or further afield.

Regional Management Practices: the absence of a tradition of shared management of shared stocks among the states bordering the Mediterranean Sea will increase the possibility of over-exploitation of these stocks. Furthermore, some states bordering the Mediterranean still have difficulty to accept conservation measures for these shared stocks as advised by Regional Management Organisations

Regional control and enforcement: This is poor in the large areas of high seas. Furthermore, there is a large presence of non-coastal states' fishing vessels in international waters which are not monitored and controlled by their flag state. The lack of homogenous regulation by the different states also complicates this issue as fishers point to a lack of similar legislation in other states when requested to comply with local or Community fisheries legislation.

Environmental: The United Nations Environment Program recently reported that 80% of the 500 million tons of sewage generated by the 130 million inhabitants of the Mediterranean region and the 100 million annual tourists is dumped untreated into the ocean. The phosphorous and nitrogen contained in sewage, as well as detergents, shampoos and fertilizers that wash into the ocean, has resulted in eutrophication throughout the Mediterranean. This has produced massive algae blooms that have removed oxygen from the water, killed prey species that predators higher in the food chain such as Blue fin tuna and swordfish rely upon, and contributed to the build-up of dinoflagellates toxic to marine animals. Fish also are threatened by releases of crude oil from land and vessels, and heavy metals such as lead and mercury.

Global warming is also being observed in the Mediterranean and the resulting increased seawater temperatures will affect the biodiversity of the region encouraging the invasion of tropical species, and will cause coastal erosion and changes to salinity and currents and may also have strong effects on aquaculture. Temperature shifts of 0.05- 0.1C in the deep sea are sufficient to induce significant changes in species richness and functional diversity. Furthermore, tuna stocks will also be affected if the water temperatures at the breeding grounds rises too much as

the young tuna are very susceptible to higher temperatures as demonstrated by studies by Professor Kimura at the University of Tokyo. The increased water temperature may cause a shift in spawning grounds and this could shift migratory patterns and exacerbate the fight over such resources. Thus, in the future, any decrease in these stocks of predatory fish (especially Blue fin tuna and swordfish) will have to be reflected in corresponding changes in the structure of the Maltese fleet.

4. Priorities and Objectives for the sustainable development of the Maltese fisheries sector

4.1. Development of the fleet

Objective: The sustainable balance between fishing capacity and fishing opportunities.

Actions:

- Adjustment of Fishing Effort
- Investments on Board fishing vessels and selectivity (Modernisation)
- Socio-Economic compensation for the management of the fleet.

The Maltese fishing vessel register has been closed for a number of years. The status of resources exploited by the Maltese fishing fleet indicates that a reduction in fishing capacity for demersal stocks fished by the small scale coastal fisheries is not required. On the other hand swordfish and BFT are stocks that require reduction of fishing capacity for long term sustainability and in the next programming period Malta intends to achieve a reduction in the reference levels for specific fleets segments. Malta intends to achieve similar scrapping levels as had been achieved in the 2004-2006 period. Under the FIFG 2004-2006 Malta scrapped three vessels for a total of 87.17 GT and a total cost of 512,000 Euro. All three vessels were long liners (multi-gear vessels) and fished for swordfish and BFT. Any capacity made available through withdrawals without aid will be reutilised for modifications to current vessels (15%) and for the reintroduction of capacity by young fishers (20%). The outstanding percentage (65%) will be directed towards industrial fisheries (fishing vessels over 12 metres in line with FAO definition). Any new fishing capacity will only be replacement of existing capacity.

Management of the different fleet segments will be managed on the basis of their gears. All major fishing techniques used currently by the Maltese fishing fleet will be considered. However, this type of management will require the collection of more specific stock data with reference to specific gears. Increases in the coastal fisheries segment will not exceed 15% of the specific current fleet segment capacity. Malta intends to decrease long lining, while the status quo for trammel netting, trawling segment and FAD fishing targeting dolphin fish will be maintained.

Malta may also utilise temporary cessation measures to achieve a reduction in the pressure on fully exploited stocks to ensure the long-term sustainability of these stocks. Management plans, which may be drawn up for those stocks which are considered heavily exploited, may include temporary cessation measures that would lead to gradual reductions of fishing effort and could lead to permanent withdrawal of capacity in certain fleet segments. These measures will focus on swordfish stocks as these appear to require attention.

In accordance with the new Technical Measures for the Mediterranean Regulation the mesh sizes for the different gears will have to be adjusted according to the new obligations. The administration will help fishers with the purchase of more selective fishing gear in the trawling segment. FAB may consider moving to more selective eco-friendly fishing gear in other segments.

Strategic indicators:

- Decrease in capacity reference level for specific fleet segments
- Stable catch levels

4.2. Development of Aquaculture

Objectives: To stabilise existing aquaculture production, increase product diversification and improve the value added of the sector

Actions:

- To close the production cycle of existing aquaculture production and to achieve the diversification of cultivated species.
- Reducing the negative impact of existing operations on the environment

FAB considers that aquaculture is a long-term natural opportunity for Malta and should help to possibly decrease the pressure on capture fisheries and to ensure a more stable provision of fish and to improve employment prospects for fishers. Thus, FAB will be giving priority to further development of this sector during the period 2007 – 2013. The main objectives are to develop an aquaculture sector that produces fish and aquatic organisms for the export market and to a certain extent to meet domestic consumers' demand. The aim is to increase the diversity in the aquaculture sector so that eventually a variety of Mediterranean native species may be produced through intensive aquaculture that makes use of the latest technologies and environment friendly methods.

One of the first priorities will be the establishment of a land-based hatchery to ensure that the local market will be provided with fingerlings of seabass and seabream and other species. Malta is also seeking to diversify from the species in current production and thus intends to develop the hatching of other species such as *Seriola dumerili*.

It is proposed that the land-based hatchery will be developed through the utilisation of an old quarry located at the south west end of Malta that had been excavated to sea-water level. It is estimated that the construction phase of this project could start in 2010 following the conclusion of studies related to impact on the environment

and the issue of the relevant permits. It is confirmed that this project will not overlap with other structural projects covered by the Regional Fund.

The development of aquaculture zones, both to the South-east as well as to the North-east of Malta for the fattening of large pelagic species will create new space for aquaculture, where the sites that are presently used for tuna farming will be available for other finfish species. It is envisaged that any future development will take place at a distance from the shore that will render the project inoffensive and in waters where it will not harm any special habitats. Modern “low-consumption” recycling systems may also be considered for pre-fattening or nursery stages that can be carried out in land-based systems.

Currently, all tuna farming activity is placed away from sites that were earmarked as Natura 2000 sites. Furthermore, existing aquaculture operations will be encouraged to present management plans concerning the re-dimensioning of their operations to achieve an improved environmental balance.

Malta also hopes to support the Malta Aquaculture Producers Association (MAPA) and create a relationship whereby co-operation is achieved towards the development of good codes of practice for an ecologically sustainable aquaculture that will have a minimal adverse effect on the environmental and social conditions. Cooperation between MAPA and FAB is increasing and thus research carried out by the Aquaculture Section can have large scale industrial applications.

Strategic indicators:

- New hatchery
- Production of new species
- Reduced environmental impact

4.3. Development of the processing and marketing sectors

Actions:

- Investment in processing and packing facilities for fisheries and aquaculture products
- Marketing and promotional campaigns

FAB will also give priority to the development of this sector. To be more competitive Malta requires further investments in its processing and marketing establishments. Malta intends to direct its investments with a view to improve product quality and presentation, and hence their value-added and may also consider investments in new technologies such as developing electronic commerce. Employment within this sector has to be increased and preserved through investments in better working conditions and vocational training, improving and monitoring public health and hygiene conditions on the place of work (HACCP audits).

Due to the small size of the internal market, the administration considers that the Maltese sector needs to tap foreign markets better if the local industry is to achieve growth. Thus Malta intends to concentrate on developing new markets for its products and new products for established markets. Funding will be made available for promotional campaigns of Maltese products in new markets and to encourage the participation of Maltese producers in fairs and expositions. To encourage consumer confidence in Maltese products, Malta also intends to develop brand-names and improve the traceability of these products.

Strategic indicators:

- Improved product quality with increased sales
- Increase in value added of product

- New market penetration
- Increased exports

4.4. Development of fisheries' infrastructure

Objectives: To consolidate and improve the current infrastructure servicing the fisheries and aquaculture industry.

Actions:

- Construction of amenities at designated ports
- Relocation of fish markets

It is the intention of the administration to provide improved amenities at the seven designated ports to allow the required inspections to be carried out adequately and in line with relevant regulations. Furthermore, in accordance with the Mediterranean Regulation, all catches of tuna, swordfish, trawled fish and lampuki have to be landed at designated ports. Thus further necessitating the need for improved amenities at the designated ports. This will involve the construction of new facilities and the upgrading of existing facilities in different ports and landing sites to provide cold storage, weighing and communication facilities. In Marsaxlokk, one of the designed ports, facilities will be enhanced through the establishment of a landing's office which will complement the hard-stand facilities project being completed under FIFG funds.

One of the major priorities for the Maltese administration during the next programming period is the relocation of the present fish markets in Valletta and Xewkija to provide better facilities for the buyers, sellers and inspectors and the for the handling of the product. Furthermore, the present fish market in Valletta is located at a site in the Valletta Grand Harbour which is being developed as a tourist area.

Strategic indicators:

- New port and market infrastructure

4.5. Sustainable development of fisheries areas

Objective: To improve the quality of life in specific coastal areas through the diversification of employment prospects

Actions: Infrastructural works in specific coastal areas

Most of the major projects involving the more important fisheries areas, such as the rehabilitation of Marsascala and St. Paul's Bay/Bugibba have already been carried out in the period prior to and just after accession. Thus, the new projects will focus on those areas which are still awaiting rehabilitation. They will aim at improving environmental conditions of the coastal areas, the organisation of existing facilities for existing fisheries communities and encouraging the diversification of activities for the creation of alternative employment, possibly in tourism. These actions may be undertaken for certain specific areas only in conjunction with other funding instruments and private participation.

Strategic indicators

- Infrastructural projects in specific coastal areas

4.6. Improving Competitiveness of the fisheries sector

Objective: To improve the competitiveness of the fisheries sector by improving the structure, organisation and its working environment.

Actions:

- Establishing Producer Organisations
- Training of fishers re upgrading of skills and retraining schemes

The fisheries administration considers the establishment of Producer Organisations to be one of its priorities in the short term. Malta considers that the establishment of these POs will enable fishers to obtain better results in marketing their produce thus increasing the overall competitiveness of the Maltese fisheries. Draft legislation has already been prepared. FAB intends to enlist assistance from another Member State for this through a twinning project for which it has received four applications following an open call. In this way, the administration will utilise the experience gained by the foreign partner.

Furthermore, with the aim of improving competitiveness in the sector, Malta may also consider training measures and training incentives for young fishermen, enabling them to enhance their skills in navigation, communication and seamanship.

FAB is also considering the financing of socio-economic measures for fishers to counteract the effects of fleet restructuring measures. The socio-economic measures will focus on the diversification of employment prospects for fishers including retraining schemes outside fishing and incentives for early departure from the fishing sector in cases of permanent cessation, and on financial contributions during temporary stoppages to permit the modernisation of the fishing vessels.

Strategic indicators

- Established Producer Organisations
- Better trained fishers

4.7. Control and monitoring

4.7.1. Current situation:

The Fisheries Inspectorate, within the FAB, is responsible for monitoring and control. The full staff complement is planned to reach 21, however there are currently only 7 FPOs. These include 2 Senior Fisheries Officers and 5 FPOs. The FPOs have attended training sessions in the UK during 2006 to upgrade their knowledge and skills.

The tasks of the FPOs include enforcing the Fisheries Conservation and Management Act and all related or subsequent legislation and regulations. They conduct inspections as appropriate at fish markets, harbours and at sea. The inspections focus on fishing grounds, catches, fishing vessels and equipment.

The Armed Forces of Malta are responsible for coastal and international waters and they carry out offshore patrols. The AFM makes use of its assets which include an offshore patrol vessel, 2 medium patrol crafts, 3 small patrol crafts and 2 patrol aircrafts. Maritime means are located at the Maritime Squadron Base in Valletta while air assets are operated from the Air Squadron at Malta International Airport.

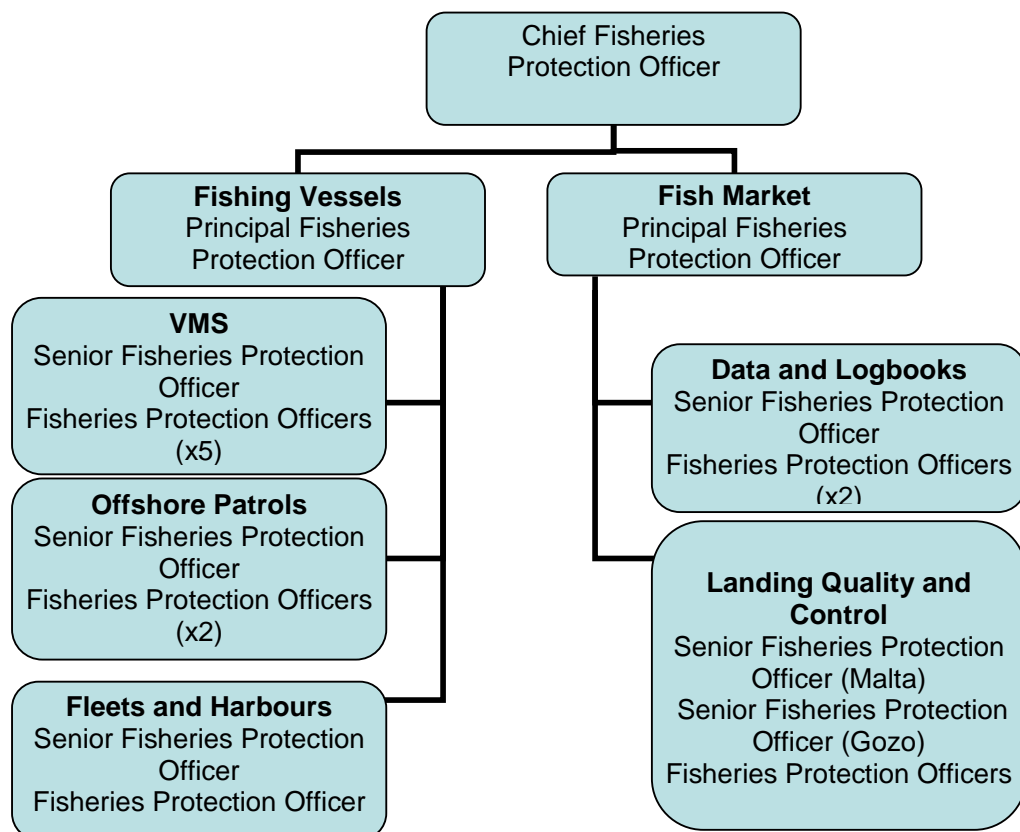
The Malta Police Force can also act as FPOs as per Chapter 425 Fisheries Conservation and Management Act. The Malta Police Force is responsible for Law Enforcement. This section has got 4 fast boats available for the executions of their duties as FPOs in inland waters.

Malta's acquis granting it the 25 mile management zone has increased its control and monitoring obligations. Since accession in 2004, Malta has equipped its fishing vessels over 15 metres with VMS. Malta is currently in the process of installing VMS in all vessels between 12 and 15 metres in order to improve the monitoring of the 25 mile management zone. During 2005, the FMC software has been upgraded to permit VMS data to be used to elaborate distance, power and consumption.

A Voice Recording System that will serve to screen all radio channels for distress signals, hailing-in and hailing-out has been installed at FAB.

4.7.2. Future Priorities:

- Recruitment of fisheries protection officers is envisaged in the short term to reach a level where all inspection obligations including those concerning tuna fattening operations can be met. This is considered a high priority and thus will be tackled in the short-term. The planned structure of the fisheries inspectorate when it is at full complement is shown below:



This increase in the complement of FPOs is necessary to enable the FMC to meet its responsibilities and enforce all regulations. These enforcement actions may increase considerably due to the coming into force of new regulations. The requirement to carry out inspections on all landings at designated ports for bottom and pelagic trawlers, purse-seines, surface long liners and hydraulic dredges foreseen in the proposed Council Regulation concerning management measures for the sustainable exploitation of fisheries resources in the Mediterranean Sea will increase the need of the larger part of the FPO team at various ports at the same time.

- Development of hardware: In the medium term, Malta will have to abide by the obligations stemming from the legislation establishing a Community vessel traffic monitoring and information system and endeavour to install this AIS system on its fishing vessels within the stipulated timetable. In the long-term, Malta will need to purchase inspection vessels for use by the FPOs in the execution of their duties including the Tuna farm observer programme.
- Software development: FAB is developing software to combine existing databases (fleet, gear and landings). Further development in the medium term is planned to establish a Fish Marketing Accounting System with the necessary cross checks with landings logbooks. Other software development is envisaged to make use of VMS data to elaborate distances, power, consumption and effort management. Communication systems among field officers and access to the market data network are also planned for the long term.

4.7.3. Financial aspects:

During the current year, the costs of emoluments of the 7 FPOs amounted to 100,000 Euros. The full complement is expected to be 21 FPOs and thus the salaries will

exceed 350,000 Euros. The Air Squadron Base of AFM allocates 4 hours per day for air patrols. From this timeframe, 2% is allocated to fisheries. The Maritime Squadron Base allocates 10 days a month for offshore patrols out of which 2% are allocated for fisheries. Twenty one days a month are allocated for onshore patrols out of which 2% are allocated for fisheries. To date, Malta has been reimbursed with LM40, 919 through the Fisheries Monitoring and Control Programme. These funds were utilised to install the first 20 VMS units. Under this Programme, Malta has applied for funds for training of fishermen and personnel, the improvement of the communication infrastructure for the FMC (coast radio station and a field communication system), patrol vessels, software development and installation of remaining VMS on all vessels above 12 metres LOA.

4.8. Data collection

4.8.1. Current Activities

The Fisheries Section of FAB started to implement the National Fisheries Data Collection Programme in January 2005.

The current programme follows on the same lines of previous programmes and includes all data collection activities requested by Minimum programme within the Data Collection Regulation (Commission Regulation EC 1639/2001 amended by EC 1581/2004) except for the collection of data in selected modules related to discards, tuna recreational fisheries and the fish processing industry for which derogations were requested due to the negligible activity in these sectors. Thus data concerning fishing capacity and fishing effort, catches and landings and biological parameters is collected through routine sampling schemes, while information related to the economic situation of the sector, the fish processing industry, recreational fisheries and discards, is obtained through pilot studies. Three scientific surveys are planned for 2007: Medits, Tuna tagging and acoustic survey, the latter being not eligible under the current Data Collection Regulation. However, the new Data Collection

Regulation is likely to include this survey as part of the Data Collection Programme. Planned activities in this area shall not be financed by the European Fisheries Fund but by other Community and national sources.

4.8.2. Future trends:

Within the framework of the new proposed Regulation, Malta will follow a programme similar to that proposed for 2007 with activities related to the Ecosystem Approach to Fisheries. An increase in the activities carried out in certain modules is also envisaged: the physical and chemical parameters of the water column will be monitored during the scientific surveys at sea. The inclusion of an acoustic survey will also provide a better insight of the processes of the water column and the food chain, since small pelagic resources will also be monitored.

An increase in the number of species currently sampled (blue fin tuna, swordfish and dolphin fish) is not expected since these make up most of the annual catch of Maltese fisheries and, therefore, it is unlikely that another species would be included in the programme.

Collection of data on the by-catch of cetaceans, turtles, seabirds and other protected species is also likely to take place.

4.8.3. Financial aspects:

Currently, the programme is run on a budget of around €500,000 and is co-financed by the EU and the Maltese government. The main expenditure is related to personnel, sub-contracting and travel costs.

New activities within this future framework will increase the financial expenditure considerably; one activity which will largely contribute to this increased budget will

be the acoustic survey together with the collection of oceanographic and environmental data.

5: Resources for the Implementation of the National Strategy

Title	Total Cost	EU Funds	Type of Fund	% EU Funds	Malta Government Contribution		Private Sector contribution	
					Euro	%	Euro	%
Scrapping	800,000	600,000	EFF	75	200,000	25		
Temporary Cessation	800,000	600,000	EFF	75	200,000	25		
Modernisation	1,750,000	525,000	EFF	30	175,000	10	1,050,000	60
Fishing gear	500,000	150,000	EFF	30	50,000	10	300,000	60
Socio-economic	150,000	112,500	EFF	75	37,500	25		
Young fishers	250,000	187,500	EFF	75	62,500	25		
Aquaculture	5,000,000	1,500,000	EFF	30	500,000	10	3,000,000	60
Marketing/Processing	1,250,000	375,000	EFF	30	125,000	10	750,000	60
Port Facilities	1,063,105	797,329	EFF	75	265,776	25		
Relocation of fish markets	3,000,000	2,250,000	EFF	75	750,000	25		
Producer Org. and new markets	150,000	112,500	EFF	75	37,500	25		
Reassignment of Vessels	150,000	112,500	EFF	75	37,500	25		
Sustainable dev. of specific coastal areas *	1,250,000	937,500	EFF	75	312,500	25		
Technical assistance	150,000	112,500	EFF	75	37,500	25		
Total	16,263,105	8,372,329	EFF		2,703,276		5,100,000	

* This value and % contribution refers strictly to the fisheries part of the action.

6. Procedure for the development, implementation and monitoring of the National Strategic Plan

Initial discussions were held during October and November 2005 with the aim of establishing the objectives and priorities of Malta's National Strategic Plan for fisheries and aquaculture for the period 2007 to 2013 in light of discussions of the new European Fisheries Fund and in the context of discussions on the financial perspectives for the same period.

Internal consultations were held between the various heads of section in the Fisheries and Aquaculture Branch (Data collection, Aquaculture, Fleet policy and Funds) to ensure that adequate preparations were made for the drafting of Malta's National Strategic Plan for fisheries. Consultations were also held with other relevant ministries such as MEPA and the Policy and Planning Division in the Office of the Prime Minister.

In line with Article 8 (Partnership) of the European Fisheries Fund Regulation, informal meetings were also held during the same period with the Fishers' Co-operatives, the Malta Aquaculture Producers Association and with the industry.

As a result of these discussions, an initial draft of Malta's National Strategic Plan was formulated. This was presented informally to the Commission at the end of December 2005. It was also submitted for reactions to the Minister for Rural Affairs and the Environment, the Parliamentary Secretary for Rural Affairs and the Environment and the Permanent Secretary within the same Ministry.

This initial draft was also presented to the Fisheries Board on 1st December, 2005. According to the Fisheries Conservation and Management Act of 4 June 2001, Article 5, this board is chaired by the Director of fisheries and is composed of one representative each of commercial fishers, the leisure fishers association (Ghaqda dilettanti tas-sajd), fish market traders, fish retailers, the armed forces of Malta and

from the department for the protection of the environment. Four members are nominated by the fishers' co-operatives while the final three other members on this board represent civil society. Subsequently, the National Strategic Plan was also submitted and presented to the fishers' co-operatives separately.

The second draft which incorporated all feedback received from the Commission, the Ministry and the sector was then finalised by the end of August 2006.

This second draft was also forwarded to the Ministry for Rural Affairs and the Environment and to the Policy and Planning Division of OPM for their feedback. After taking into consideration all the feedback received, the National Strategic Plan was concluded in July 2007 and submitted to the Commission for final approval in September, 2007. The first draft of the Operational Programme should be terminated during August 2007.

The Ministry for Rural Affairs and the Environment, in fulfilling its responsibility for ensuring the management and control of the operational programme in respect of the European Fisheries Fund 2007 to 2013, has ensured that the management and control systems have been set up in accordance with the detailed provisions of Articles 57 to 61 of Regulation (EC) 1198/2006 of 27 July 2006 on the European Fisheries Fund (the Regulation). This includes measures to ensure the prevention, detection and correction of irregularities and recovering amounts unduly paid together with interest on late payments where appropriate.

To this end, the Ministry has completed a comprehensive restructuring exercise within the Veterinary Affairs and Fisheries Division thereby separating the regulatory and operational roles. The organisation chart at Annex VIII shows the new organisational set up, clearly identifying the position of a Director General Veterinary and Fisheries Administration and Operations, as well as a Director General Veterinary Regulations and Fisheries Conservation and

Control. Within this overall organisational structure, the Ministry has appointed a Managing Authority, a Certifying Authority and an Audit Authority, in terms of Articles 57 to 61 of the Regulation. These authorities will guarantee the efficient and correct implementation of our obligations with regard to the management and control systems, the certification of expenditure and the prevention, detection and correction of irregularities and infringements of Community law.

6.1. The Managing Authority

The Director General Veterinary and Fisheries Administration and Operations, will be the Managing Authority. The institution and capacity building required for this important role has been carried out as part of the restructuring exercise. Two programme Managers have been identified to carry out the functions of the Managing Authority. Additional support services will be provided as needed. Such support services will include the availability of a legal advisor and other office support staff. The Managing Authority will carry out all the functions listed in Article 59 (a) to (j) of the Regulation. The Managing Authority is also responsible for project selection and implementation, recording and evaluation (Ex ante, Interim and Ex post), and will ensure that procedures and processes are in place to ensure that the programme is implemented in accordance with the principle of sound financial management.

6.2. The Certifying Authority

The Maltese Paying Agency has been appointed the Certifying Authority in terms of Article 60 (a) to (f) of the Regulation. The Maltese Paying Agency has been functioning as the Certifying Authority for the agriculture and rural development projects under the 2000-2006 funding programme. The Managing

Authority is in the process of compiling the manuals of procedures to be followed by the Certifying Authority in respect of the European Fisheries Fund; accreditation will be issued by the Competent Authority only when all procedures and processes would have been successfully audited and duly certified.

6.3. The Audit Authority

The Internal Audit and Investigations Directorate, within the Cabinet Office, will be the Auditing Authority in terms of Art 61 (a) to (c) of the Regulation. The Audit Authority will ensure that audits are carried out to verify the effective functioning of the management and control system of the operational programme, and that audits are carried out on the operations on the basis of an appropriate sample to verify expenditure declared. Additional responsibilities include reporting to the Commission.

6.4 Monitoring Committee

In addition to the setting up of the above three Authorities, a Monitoring Committee, in terms of Articles 62 to 66 of the Regulation, will be setup in agreement with the Managing Authority within three months from the date of notification to Malta of the Commission decision approving the Operational Programme. The Monitoring Committee shall draw up its rules of procedures within the institutional, legal and financial framework of Malta and adopt them in agreement with the Managing Authority in order to exercise its missions in accordance with Council Regulation EC/1198/2006.

7. Annexes

Annex I - Farmed Fish 2003 – 2005

(i) Total Production

SPECIES	2003			2004			2005		
	Weight (tons)	Value (Lm '000)	Value (€ '000)	Weight (tons)	Value (Lm '000)	Value (€ '000)	Weight (tons)	Value (Lm '000)	Value (€ '000)
SEA BREAM	788) 1,701	3,962	743	1,617	3,767	567) 1,900	4,426
SEA BASS	93			125	125	291	205		
BLUE FIN TUNA	3,550	16,764	39,050	3,069	13,175	30,689	3,065	14,712	34,270
<i>Totals</i>	4,431	18,465	43,012	3,937	14,917	34,747	3,837	16,612	38,696

Annex II Imports and Exports 2003 - 2005

(i) Imports

YEAR	FROZEN FISH			FRESH FISH		
	Weight (kg)	Value (Lm)	Value (€)	Weight (kg)	Value (Lm)	Value (€)
2003	1,619,343	2,009,905	4,681,819	14,531	64,858	151,078
2004	1,771,431	2,173,314	5,062,460	15,769	68,854	160,387
2005	1,785,958	2,202,275	5,129,921	16,938	71,298	166,080

Frozen fish consisted mostly of salmon, mussels, prawns and octopus. Fresh Fish consisted mainly of demersal fish, salmon, lobsters and oysters

(ii) Exports

Species	2003			2004			2005		
	Quantity (kg)	Value (Lm)	Value (€)	Quantity (kg)	Value (Lm)	Value (€)	Quantity (kg)	Value (Lm)	Value (€)
Blue Fin Tuna	176,583	457,909	1,066,641	197,682	404,084	941,263	211,886	521,678	1,215,184
Swordfish	11,587	34,632	80,671	101,949	285,267	664,493	143,176	402,204	936,884
Albacore	1,400	980	2,283	9,925	7,822	18,220	0	0	0
King Prawns	570	4,278	9,965	0	0	0	0	0	0
Demersals	2,302	7,967	18,558	484	1,394	3,247	1,823	5,468	12,737
<i>Total</i>	<i>192,442</i>	<i>505,766</i>	<i>1,178,118</i>	<i>310,040</i>	<i>698,567</i>	<i>1,627,223</i>	<i>356,885</i>	<i>929,351</i>	<i>2,164,805</i>

Annex III. Fisheries data

(i) Supply of Fish

Date	Production*	Imports*	Exports*	Total Supply	Per Capita Supply
2004	tonnes live weight				kg/year
Fish for direct human consumption	1,936	1,853	1,138	2,651	6.58
Fish for animal feed and other purposes	N/A	19,309	N/A		

* Tuna penning industry is not included since the live fish are imported and the harvested product is re-exported. Canned and other processed products are also not considered.

(ii) Employment

Estimated Employment (2004):	**
(i) Primary sector (including aquaculture):	539
(ii) Secondary sector:	870

Gross value of fisheries output (2004):	4.9 million €
Trade (2004):	
Value of fisheries imports:	6.5 million €
Value of fisheries exports:	5.3 million €

** This data includes both capture fisheries and aquaculture.

(iii) Landings 2003 – 2005

(listed in descending order by average weight of landings)

SPECIES	SPECIES	2003			2004			2005			Average
		Weight (kg)	Value (Lm)	Value (€)	Weight (kg)	Value (Lm)	Value (€)	Weight (kg)	Value (Lm)	Value (€)	
MALTESE NAME	ENGLISH NAME										
LAMPUKI	DOLPHIN FISH	507081	385983	899099	472700	335415	781307	447095	362507	844414	475625
TONN	BLUE-FIN TUNA	220218	543771	1266646	227774	461268	1074465	301443	712163	1658894	249812
PIXXISPAD	SWORDFISH	133517	270146	629271	174342	486982	1134363	323314	765935	1784149	210391
GAMBLI	SHRIMPS\ PRAWNS	36753	263116	612895	26179	198202	461686	30146	182689	425551	31026
DOTT/HNIEZER	STONE BASS	32961	92043	214403	30610	85650	199511	24170	74289	173047	29247
MAZZOLA	DOG FISH	17049	17616	41034	20361	20236	47137	18610	19790	46098	18673
VOPI	BOGUE	19002	13957	32511	15629	14464	33692	21088	19211	44750	18573
CIPPULLAZZ	SCORPION FISH	10559	56126	130738	11317	60201	140231	11983	62172	144822	11286
FANFRI	PILOT FISH	15791	12951	30168	4466	6747	15716	10098	15080	35127	10118
ALONGA	ALBACORE	4666	3325	7745	10354	8246	19208	14565	11117	25896	9862
PAGRI	COMMON SEA BREAM	7468	41677	97081	6687	37907	88300	5849	32080	74726	6668
RAJ	SKATE	5171	3806	8866	5269	3191	7433	6497	4821	11230	5646
KAVALLI	MACKEREL	303	372	867	4313	4349	10130	12143	10235	23841	5586
QARNIT	OCTOPUS	4530	10836	25241	4284	9825	22886	6804	13731	31985	5206
TUMBRELLI	FRIGATE MACKEREL	2350	969	2257	7615	1596	3718	4373	1015	2364	4779
MURUNA	SIX-GILLED SHARK	6157	6269	14603	4151	4762	11092	3484	3796	8842	4597
ACCOLA	AMBERJACK	3364	10632	24766	5324	10907	25406	5094	13687	31882	4594
MERLUZZ	HAKE	2597	5595	13033	2197	4385	10214	6867	14020	32658	3887
SKORFON	SCORPION FISH	2796	7400	17237	2289	6417	14948	6033	16460	38341	3706
TRILL	RED MULLET	3108	6709	15628	3375	8629	20100	3182	8743	20366	3222
SARGI	WHITE BREAM	3751	18443	42961	2057	9123	21251	2495	10828	25222	2768
SAWRELL	HORSE MACKEREL	1281	1524	3550	2446	2246	5232	3801	3675	8560	2509
KLAMARI	SQUID	2037	8787	20468	890	4098	9546	4416	15167	35330	2448
TUNNAGGI	SMALL BLUE-FIN TUNNY	2971	2010	4682	268	304	708	4084	4858	11316	2441
GRINGIJJET	CONGER	2429	2147	5001	1739	1541	3590	2227	2512	5851	2132
LIPP	LING	1632	3651	8505	2112	3779	8803	2293	3940	9178	2012

SICC	CUTTLE FISH	1213	2507	5840	541	1122	2614	3507	7534	17549	1754
LIZZ	BARRACUDA	1065	1529	3562	1648	2396	5581	2123	3498	8148	1612
PAGELL	PANDORA	2536	8927	20794	647	1676	3904	1468	3869	9012	1550
BAZUK	BLUE SPOTTED BREAM	786	4021	9366	1304	6874	16012	1929	10531	24531	1340
KUBRIT	LITTLE TUNNY	1257	1003	2336	955	672	1565	1335	1580	3680	1182
MAKKU	PELLUCID SOLE	769	1234	2874	448	830	1933	2209	1750	4076	1142
DENCI	DENTEX	534	2915	6790	1238	5026	11707	1390	6716	15644	1054
SERRAN	COMBER	748	802	1868	862	832	1938	1524	1501	3496	1045
KAHLI	SADDLED BREAM	1244	4160	9690	783	2502	5828	919	2756	6420	982
PASTARDELLA	SPEAR-FISH	929	765	1782	730	844	1966	972	1083	2523	877
CERVJOL	AMBERJACK JUV.	560	1631	3799	1268	1869	4354	740	989	2304	856
GALLINI	GURNARD	1274	3066	7142	179	591	1377	1060	4294	10002	838
MUNQARA	PICAREL	450	402	936	1124	528	1230	650	526	1225	741
TRACNI	SPOTTED WEEVER	175	352	820	119	261	608	1900	4027	9380	731
IMREJEN	MORAY EELS	226	162	377	338	281	655	1517	1278	2977	694
XILEP	SALEMA	85	71	165	1024	589	1372	895	475	1106	668
ARZNELL	PICAREL	727	506	1179	299	241	561	886	542	1263	637
PLAMTI	ATLANTIC BONITO	270	415	967	569	836	1947	1045	1226	2856	628
CERNA	GROUPER	211	857	1996	967	3581	8341	674	1996	4649	617
ZAGHRUN	ROUGH SHARK	480	314	731	411	235	547	848	880	2050	580
GATTARELLI	SMALL SPOTTED DOG FISH	408	368	857	276	308	717	996	850	1980	560
ALJOTTA	MIXED FISH	684	1049	2444	285	954	2222	444	425	990	471
TOTLI	SQUID	633	981	2285	84	88	205	646	1143	2662	454
PIXXIPLAMTU	PORBEAGLE SHARK	109	222	517	469	442	1030	608	1080	2516	395
BOLL	COMMON STING RAY	221	223	519	528	332	773	436	389	906	395
AWRAT	GILTHEAD BREAM	138	276	643	581	757	1763	236	569	1325	318
HUTA KAHLA	BLUE SHARK	446	501	1167	0	0	0	479	493	1148	308
REBEKKINI	LONG NOSE SKATE	235	140	326	50	37	86	503	368	857	263
SAN PIETRU	JOHN DORY	91	318	741	0	0	0	633	2675	6231	241
PETRICI	ANGLER FISH	15	17	40	0	0	0	708	815	1898	241
GURDIEN	THRESHER SHARK	84	126	294	0	0	0	339	525	1223	141
CINTORINI	SCARBARD FISH	190	80	186	0	0	0	216	190	443	135

XKATLU	ANGEL FISH	111	190	443	0	0	0	202	231	538	104
AWWISTA	CRAYFISH	27	199	464	15	101	235	224	1288	3000	89
MULETT	GREY MULLET	26	28	65	0	0	0	201	172	401	76
HUT IEHOR	OTHER SPECIES	1720	1265	2947	1332	826	1924	19932	25069	58395	7661
	<i>TOTALS</i>	<i>1072222</i>	<i>1831483</i>	<i>4266208</i>	<i>1069826</i>	<i>1826101</i>	<i>4253671</i>	<i>1338553</i>	<i>2477854</i>	<i>5771847</i>	<i>1160200</i>

Annex IV: Locations of the main Maltese fishing ports and sites



Valletta Area: Msida/Gzira, St. Julians/Sliema, Valletta, Marsa, Kalkara	222
Southwest Area: Marsaxlokk, Marsascula, Birzebbugia	505
West Area: Gnejna, Ghar Lapsi	70
Northeast Area: St. Paul's Bay, Mellieha, Bugibba/Qawra	264
Gozo and Comino: Mgarr, Marsalforn, Xlendi	355
Other	4

Annex V - . Fleet Data

(i) Distribution of vessels (MFA & MFB) according to main gear

(ISSCFG) International Standard Statistical Classification of Fishing Gear

Code	Category	No. of MFA Vessels	MFA %	No. of MFB Vessels	MFB %	Total Vessels	%
01	Trammel Nets	92	21.4	247	24.9	339	46.3
02	Long Lines	197	45.8	466	47.0	663	92.8
03	Traps	34	7.9	100	10.1	134	18
04	Trawls	17	4.0	4	0.4	21	4.4
05	Gill Nets	10	2.3	8	0.8	18	3.1
06	Trolling Lines	30	7.0	124	12.5	154	19.5
07	Surrounding Nets	4	0.9	1	0.1	5	1.03
08	Kannizzati Fisheries	33	7.7	7	0.7	40	8.37
09	Other	13	3.0	33	3.3	46	6.33
						1420	

(ii) Distribution of MFA & MFB vessels according to geographical area

Region	No. of MFA Vessels	No. of MFB Vessels	Total
Valletta Area: Msida/Gzira, St. Julians/Sliema, Valletta, Marsa, Kalkara	53	169	222
Southwest Area: Marsaxlokk, Marsascala, Birzebbugia	216	289	505
West Area: Gnejna, Ghar Lapsi	7	63	70
Northeast Area: St. Paul's Bay, Mellieha, Bugibba/Qawra	47	217	264
Gozo and Comino: Mgarr, Marsalforn, Xlendi	105	250	355
Other	2	2	4
			1420

(iii) Distribution of MFA & MFB vessels according to length

Vessel Length (LOA)/m	Number of MFA Vessels	Number of MFB Vessels	Total
< 6	135	598	733
6 - 10	161	355	516
10 - 12	36	26	62
12 - 24	88	10	98
> 24	10	1	11
			1420

Annex VI. General geographic and economic data

Area:	320km ²
Water area:	N/A
Shelf area:	13,000km ²
Length of continental coastline:	140km
Population (2004):	402,668
GDP at purchaser's value (2004):	1,952.5 million €
GDP per head (2004):	4,849 €
Agricultural GDP (2004):	45.7 million €
Fisheries GDP (2004):	5.7 million €

Annex VII: General legal framework

As a European Union member state Malta follows all relevant legislation within the framework of the EU Common Fisheries Policy. At national level the current legislation in force related to fisheries and aquaculture is summarised in the following table:

Directly related to Fisheries & Aquaculture

Chapter 425	Fisheries Conservation & Management Act
Chapter 146	Agriculture and Fishing Industries (Financial Assistance) Act
Chapter 129	Tunny Fishery (Shares) Act
Subsidiary Legislation 425.07 (2004)	Fishing Vessels Regulations
Subsidiary Legislation 425.01	Fishery Regulations
Subsidiary Legislation 425.02	Fish Marketing Regulations
Subsidiary Legislation 425.04	Slipway (Use) Regulations
Subsidiary Legislation 425.05	Fisheries Officers (Remuneration) Regulations
Subsidiary Legislation 425.06	Marine Vegetation Licence Regulations
Subsidiary Legislation 425.03	Tunny Fish (Importation) Restriction Order
Subsidiary Legislation *****	Berthing Regulations
Subsidiary Legislation 36.34	Aquaculture Regulations
Subsidiary Legislation 231.12	Sale of Fish Regulations
Subsidiary Legislation 231.43	Fish Packing and Processing Establishment Regulations
Subsidiary Legislation 36.26	Prohibition of Sale of Sea-Food Regulations
Subsidiary Legislation 35.01	Fees leviable by Government Departments Regulations (Sections 5b & Ministry for Agriculture & Fisheries - Fisheries section)
Subsidiary Legislation 35.10	Fees for Abattoir and Veterinary Services Regulations (Section II)
Subsidiary Legislation 117.12	Price Control of Fish Regulations

Subsidiary Legislation 35.13	Fees Levied at Agricultural Produce Marketing Centres Regulations
OTHER LEGISLATION OF IMPORTANCE TO FISHERIES & AQUACULTURE	
Chapter 348	Environment Protection Act
Chapter 226	Territorial Waters and Contiguous Zone Act
Chapter 194	Continental Shelf Act
Chapter 352	Malta Maritime Authority Act
Chapter 356	Development Planning Act
Chapter 234	Merchant Shipping Act
Chapter 271	Marine Pollution (Prevention and Control) Act
Subsidiary Legislation 231.32	Residues in Meat Regulations
Subsidiary Legislation 231.34	Maximum Residue Limits in Veterinary Medicinal Product Regulations
Chapter 10	Code of Police Laws (Section 130)
Subsidiary Legislation 128.01	Police Licenses Regulations (Section 15)