

# SUCCESS WORKSHOP SUMMARY



## Summary from Focus Group Workshop and World Café event on: Competitiveness and Sustainable Sourcing in Europe for Fish and Seafood

SUCCESS Co-Creation platform, May 18-19<sup>th</sup>, FAO, Rome

How can the fish industry motivate sustainable sourcing of fish and seafood? What is the role of certification schemes? Are international guidelines and policies sufficient to promote the sustainable development of the fisheries and aquaculture industries? What are the bottlenecks? Where are the gaps? Where are the opportunities and the way forward? These were some of the questions that the invited participants were challenged with at the SUCCESS project's "Co-creation platform" in Rome.

The objective of the focus group workshop was to bring stakeholders to the project to exchange their views, provide an overview on the current initiatives and practices and give insight to their vision on how to enhance the competitiveness and sustainability. The workshop was divided into four sessions where participants identified bottlenecks and shared their views on opportunities to motivate sustainable sourcing in practice. The World Café further addressed the benefits and drawbacks of certification schemes, measures to combat IUU and discussed policy options, with the aim to identify gaps where more research and activities were needed. Participants came from seafood industries, retail, sustainability initiatives, fisheries associations, FAO, DG Mare of the European Commission, as well as representatives of certification schemes and accreditation bodies on sustainable fishing and aquaculture.

Organisers: MarkMar, Iceland; University of Brest (UBO) – UMR AMURE, France; Fishor Consulting Ltd., UK; LEI Wageningen (WUR), NL; University of Cantabria, Spain; NISEA, Fisheries and Aquaculture Economics Research, Italy; Thünen-Institute, Market Analysis, Germany, in collaboration with FAO

### Invited speakers and FAO collaborators:

Nicole Franz, FAO

Hyacinthe Cloarec, Global director Fish Management, METRO

Ann Wilkings, State of Sustainability Initiatives, IISD

Uwe Barg, FAO

Paolo Bray, Friend of the Sea (FOS)

Nicholas Guichoux, Marine Stewardship Council (MSC)

Laurent Galloux, Bureau Veritas

Kristinn Hjálmarsson, Iceland Sustainable Fisheries (ISF)

Xavier Guillou, DG Mare, European Commission

Audun LEM, FAO

Brian O'Riordan, Low Impact Fisheries Europe (LIFE)

Karl Hjálmarsson, Iceland Seafood International (ISI)

Nigel Edwards, Seachill, Icelandic Group

Maria Eleonara D'Andrea, FAO

Guus Pastoor, European Fish Processors Association, Dutch fish Processors and Traders Association

Emma McLaren, Sustainable Fisheries Partnerships

Barrie Deas, NFFO, National Federation of Fishermen's Organisations

Paul Steinar Valle, Kontali (PrimeFish project)

## SUCCESS Focus Group Workshop, 18th May 2016

Audun LEM (FAO) welcomed the participants to the FAO headquarters

Bertrand Le Gallic, University of Brest, France, the coordinator of SUCCESS gave an introduction to the project and explained the aim of the workshop

Katrin Zander, Thünen Institute, Germany introduced the first results from the SUCCESS consumer research.

### **Session 1: Sustainable sourcing defined, and future trends** *Panel chair: Simon Mardle, Fishor, UK*

Nicole Franz, FAO, Fishery Planning Analyst, discussed the definition of sustainable sourcing, and emphasised the FAO code of conduct for responsible fisheries (1995) and FAO guidelines on ecolabelling as an international framework. At the moment the environmental criteria has been in focus but the future trend is to include all sustainability dimensions in guidelines on sustainable sourcing. The **opportunities** are to provide guidance for socioeconomic sustainable behaviour in the long term.

Hyacinthe Cloarec, Global director Fish Management, METRO explained the company's vision which is aimed at engaging people in the concept of sustainable development. He gave an overview on the company's strategy on how to implement principles to work towards long term sustainability. Currently, the **challenge** is that there is no justification for higher price at retail for certified products, since there is lack of feedback from the consumers' willingness to pay more. Certifications alone do not motivate changes, thus the **opportunity** and way forward is to enhance communication and optimise the cost of certification along the supply chain and involve all stakeholders to work together for our common future.

Ann Wilkings, State of Sustainability Initiatives, IISD (International Institute of Sustainable Development)  
An overview was given on the SSI<sup>1</sup> framework and the status of voluntary labelling schemes as an **opportunity** to understand market trends and systems characteristics. The market presence of certified seafood is 14,2 % of total seafood of which 79 % is wild catch based on the performance trends of the nine most prevalent seafood certification schemes operating in the wild catch and aquaculture sectors. There are mainly 5 species targeted by certification (Anchoveta 29%, Salmon 15%, Alaska Pollock 10%, Tuna 8%, Cod 6%) and the main regions for certification have been in Europe, North America and South America. Although Asia accounts for 69% of the total seafood production, the overall rate of certification in Asia is low (11%).

Uwe Barg, FAO, presented the outcome of the Vigo Dialogue on stakeholder consultations in 2014 and 2015 on the **challenges** regarding decent work in fisheries. **Opportunities** were identified as recommendations to establish; (i) a reference framework on decent work in the seafood sector; (ii) a practical guide for fish workers on legal labour instruments and standards, (iii) strengthening and developing partnerships in collaboration with ILO and FAO; (iv) institutionalizing the Vigo Dialogue (work with governments, NGOs and companies; (v) and monitoring improvements on labour issues and decent work benefits.

Paolo Bray, Friend of the Sea The FOS certification scheme was launched in 2008 and its uptake by industry has grown rapidly. The benchmark criteria include environmental indices (FOS best performing) and a social accountability index. EU accreditation of the label has been achieved, and onboard there are observers. An **opportunity** is the collaboration with other schemes on dolphin Safe, social accountability and Global GAP and Friend of the Earth, which is a new scheme.

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<sup>1</sup> <http://www.iisd.org/ssi/standards-and-the-blue-economy/>

## **Session 2: Certification Schemes** *Panel chair: Gudrun Olafsdottir, MarkMar, Iceland*

Nicholas Guichoux, MSC explained the background for the establishment of the MSC fisheries standards and the MSC Chain of custody standard. The global impact of MSC is accounting for 12,5 % of global wild caught seafood, where 288 fisheries have been certified and 93 are under assessment. Over 22 000 MSC-labelled products exist. The impact and awareness of the MSC program is being assessed also among consumers with the aim to probe the view of consumers on sustainable seafood.

Laurent Galloux, Bureau Veritas, BV provides recognition of responsible fishing for B2C (business to consumer) with audits of certification schemes for eco-labels like MSC, FOS, Ecolabel pêche durable France, and also B2B (business to business) recognition for responsible fishing and responsible sourcing with the aim to support companies to fulfil their CSR policy. The **bottlenecks** in sustainable seafood sourcing certification is that currently not all responsibilities are integrated in standards; the percentage of certified fisheries is only 15-20 % and; very low number of certified fisheries are in the developing countries. An **opportunity** is to provide guidance to companies and 2<sup>nd</sup> party evaluation to promote better practices.

Kristinn Hjálmarsson, Iceland Sustainable Fisheries (ISF) A background was given on the significance of fishing activities in Iceland, and the debate and **challenges** caused by confusion regarding the scope and value of the various certification schemes for the fish industry. In 2012 ISF was founded as a client group for MSC certified fisheries which was an **opportunity** to share the cost of certification. There are 46 members involved today, ranging from fisheries, production companies and sales companies. Currently, seven species are certified according to different gear and further extension of the scope to include more species is in progress. The number of Icelandic companies with CoC certifications has increased during the last 6 years from 1 to 130 in 2015. The main reason for the increase in certification is in response to market demand mainly from retailers in Northern Europe.

Xavier Guillou, Markets and Trade - MARITIME AFFAIRS AND FISHERIES, DG Mare European Commission

The context was on the role of authorities in eco-labelling, following a long debate on the **challenges** and the importance of facilitating integration of public authorities and certification schemes. **Opportunities** are detailed in the newly published report of the Commission on options for an EU eco-label scheme for fishery and aquaculture products<sup>2</sup>, which is based on stakeholder consultations as reported in: "Feasibility Report on options for an EU ecolabel scheme for fishery and aquaculture products"<sup>3</sup>.

Audun LEM, FAO (replacing Herman Wisse), explained the role of FAO in GSSI (Global, Sustainable Seafood Initiative) through the FAO COFI sub-committee, by providing support to develop a benchmarking tool and harmonisation to assist schemes for captured fisheries. At the moment the **challenge** is confusion where too many schemes and labels are existing, which is complex in particular for the developing countries. The **opportunities** are harmonisation of common elements within the scope of many of the international certification schemes including; principles on equivalence, social issues, quality and safety, and sustainability.

## **Session 3: Sustainable sourcing in practice** *Panel chair: Maria Cozzolino, Nisea, Italy*

Brian O'Riordan, Low Impact Fisheries Europe (LIFE) Sustainable sourcing in practice from European small scale fisheries (SSF) was presented and the characteristic of the fisheries highlighted. SSF are important in Europe and account for 74 % of active EU vessels and 50 % of fishing employment (STEF 2015). SSFs are characterised as short value chains with fresh products and have a key role in keeping small ports and local

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<sup>2</sup> <http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM:2016:263:FIN>

<sup>3</sup> [http://ec.europa.eu/fisheries/documentation/studies/feasibility-report-eu-ecolabel-scheme-for-fishery-and-aquaculture-products\\_en.pdf](http://ec.europa.eu/fisheries/documentation/studies/feasibility-report-eu-ecolabel-scheme-for-fishery-and-aquaculture-products_en.pdf)

livelihood. However, the **challenges** are that the profitability is low and average wages are only half compared with large scale fisheries, they have restricted access to fishery resources and a lack of organizational structures. **Opportunities** include provision in new CFP: help to create association for SSF, landing obligation, own label schemes, community supported fisheries schemes (fishing hubs, ethical trading, direct marketing, social enterprise, economies of scale).

Karl Hjálmarsson, Marketing and Communication, Iceland Seafood International (ISI). ISI is a leading supplier for major retailers for North Atlantic seafood, and processors of high quality seafood in Spanish and UK markets. They export fish products from Iceland and operate subsidiaries in Europe, N-America and Asia. **Bottlenecks** today are, complexity caused by too many standards and certifications, and consequently costly and time consuming audits. There is a lack of harmonisation between standards and in fact too many authorities or self-made controllers. **Opportunities** are to motivate harmonisation and simplify procedures where guidelines or checklists would be provided and ideally one certification on sustainability performance and one system for electronic traceability which in the end would be cheaper and more effective.

Nigel Edwards, Seachill, Icelandic Group. The company is a leading supplier to the UK retail (15% market share), and has currently presence in 8 countries. The vision of the company is TRUST based on 3 pillars which represent their values (sustainable, ethical, authentic). The **challenges** are to deliver provenance and to ensure traceability with rigorous internal audits and collaboration with their supply chain partners. The **opportunities** are linked to the company's established strategies to reach their aims. The aims are based on 4Cs: (i) Clarity of objectives - which implies uptake of standards; (ii) Collaboration; (iii) Commitment - in time and resources; and (iv) Consensus - on how to get there, by working according to agreements on measures towards sustainability and combat IUU, with guidance from AIPCE-CEP and FDF (Food and Drink Federation).

Maria Eleonara D'Andrea, FAO. An overview on issues and efforts to promote decent working conditions along the seafood value chain was presented. **Bottlenecks:** Emerging concern for social sustainability in the seafood value chain. Decent work and issues on human rights abuses are in the spotlight (human traffic, abuses, child labour, poor application of existing instruments (ILO), low rate of workers unions.) **Opportunities:** Existing tools are environmental sustainability standards and certification schemes which are including some labour issues (e.g. Fair Trade, Seafood Responsible Fishing scheme, GlobalG.A.P., ASC, GLP-ILO), but there is no international consensus on labour condition or fair labour practice certifications. **Challenges:** Certification schemes and social audits may not be able to guarantee good practices. Full traceability and transparency is complex and it is foreseen that social audits will increase cost in the value chain which will be passed on to the consumers. There is a lack of a set of standards or guidelines for social compliance. Governments could be responsible for a legal framework and enforcement of ILO labour standards. Policy implication includes multi-stakeholder and pre-competitive initiatives e.g. the Vigo Dialogue and an international framework to motivate initiatives to develop guidelines on working conditions. Motivation of relevant legal instruments supported by governments and FAO role is to include labour issues in existing guidelines to support fisheries policy

#### **Session 4: Ensuring the sustainable dimensions of European seafood products: Myths, realities and opportunities.** Panel chair: Sigurdur G. Bogason, MarkMar, Iceland

Guus Pastoor, European Fish Processors Association, Dutch fish Processors and Traders Association. Fish processors and traders share a vision for sustainable European fisheries and aquaculture and created the AIPCHE-CEP recommendation on Principles for environmentally responsible fish sourcing and fish processing and made a foresight scenario analysis for optimistic, moderate and low prospects for the EU production and consumption to assess the EU self-sufficiency. The **challenges** are high level of imports today from Asia, but what will be the status in 2030? What to do? => Food security should be a priority. The **opportunities** are to use full potential of EU production, global systems to fight IUU, political focus on

global sourcing of raw material, product and market development, stimulate innovation in processing and logistics, sustainable international value chains and consider all dimensions of sustainability (social, environmental and economic).

Emma McLaren, Sustainable Fisheries Partnerships, explained the role of Fishery Improvement Projects (FIPs) to ensure Sustainable Seafood Sourcing in EU and Aquaculture Improvement Projects (AIP) . Successes have been seen in catalyzing and mobilizing the environmental parameters of sustainability and bring together stakeholders from across silos and across disciplines. The experience gained could provide lessons learned for other parameters and could provide a framework for integrating social and economic dimensions into sustainability criteria. An **opportunity** and an important catalyst to ensure social and economic dimensions to sustainable sourcing could be through Retailer Public Policies.

Barrie Deas, NFFO, National Federation of Fishermen’s Organisations, reflected on the story of the catching sector, different types of vessels and gears and the place for small/medium, and large fisheries. The context of quota holding issues being discussed must reflect differentiation between demersal and pelagic fisheries. If these are mixed together while comparing quotas of small and large scale fisheries the discussions aren’t reflecting the real issue any more. The core message from the experience of stock depletion and stock recovery over the last 30 years is that effective fisheries management is the route to reaching and maintain high yield fisheries. **The way forward** is managing fleet capacity since this is the single most important component within the array of management tools in the toolbox. The **challenge** for certification schemes is the difficulty to see much relevance for certification as an agent of change. They are however likely to continue for reputational and market access reasons.

Paul Steinar Valle, Kontali (PrimeFish project). The focus of the Primefish project is on the economic sustainability of European fisheries and aquaculture, defined as the long term economic viability of the sector. There are links and synergies between the H2020 projects, SUCCESS and PrimeFish. An overview and examples were given on the identified **challenges** regarding competition in the global marketplace and the limited availability of production and socio-economic data to use for modelling and prediction tools. Self-sufficiency in aquatic food is decreasing in Europe. Fisheries have reached their limits, and while global aquaculture is growing the European aquaculture has been stagnant. Turkey and Greece are the main competitors in SeaBass and SeaBream (SBSB) production and scenarios are foreseen where the profitability and innovative future development of the SBSB EU sector is threatened by low price imports.



Figure 1 Word cloud of the key “challenges” for sustainable sourcing and certification schemes discussed in the SUCCESS focus group workshop in Rome on May 18<sup>th</sup> 2016



Figure 2 Word cloud of “opportunities” to motivate sustainable sourcing as identified in the SUCCESS focus group workshop in Rome on May 18<sup>th</sup> 2016

### SUCCESS Workshop conclusions

The workshop gave very good insights to the key challenges and opportunities for seafood businesses regarding sustainable sourcing and certification. The key topics discussed are summarised as word clouds for a quick overview in Figures 1 and 2. The lessons learned at the workshop are valuable for the SUCCESS partners to consider further in the project’s research work.

### SUCCESS World Café on Sustainable Sourcing, 19<sup>th</sup> May, 2016

The aim of the World café following the SUCCESS workshop on Sustainable sourcing was to obtain inputs from the participating stakeholders to help with establishing a consensus on key points influencing sustainable sourcing and competitiveness of the fisheries and seafood sectors. Facilitators and reporters were from the SUCCESS project and they motivated a SWOT type discussion where bottlenecks, weakness and threats were identified and strength, and opportunities highlighted and finally suggestions made for the way forward. The world café was organised as five sessions where all participants discussed each theme.

#### Themes (Discussions at 5 tables - 20 min)

1. **Certifications** Moderator: Guðrún Ólafsdóttir, MarkMar , Iceland
2. **Policy options** Moderator: Bertrand LeGallic, UBO, France
3. **IUU – illegal, unregulated, unreported** Moderators: Marie-Luise Rau, WUR, Netherlands and José M.F. Polonco, Univ Cantabria, Spain
4. **Research inputs – sustainable sourcing** Moderators: Simon Mardle, Fishor, UK and Katrin Zander, Thünen Institute, Germany.
5. **Future trend – sustainability assessments** Moderator: Myriam Nourry, UBO, France

# SUCCESS WORLD CAFÉ SUMMARY

## Overview of discussions at the SUCCESS World Café in Rome on “Competitiveness and Sustainable Sourcing in Europe for Fish and Seafood”

	Challenges - Weakness	Opportunities <i>Future trends - Research input</i>	Way forward ? <i>Future trends - Research input</i>	Who is responsible? <i>Private v.s. public initiatives</i>
<p><b>Sustainable Sourcing</b></p> <p><i>Unclear criteria for sustainability</i></p> <p><i>Lack of defined checklist</i></p> <p><i>Benchmark</i></p>	<p>The various sustainability schemes and different scope of certifications are confusing.</p> <ul style="list-style-type: none"> <li>– <b>Sustainability v.s. responsibility</b></li> <li>– Fisheries: <b>Maintain stocks and livelihoods for the future.</b></li> <li>– Aquaculture: Existing standards are only covering responsibility - best practices</li> </ul>	<p>Three pillars of sustainable development: <b>economic, environmental, social</b> --&gt; need to assess each dimension – today, mainly environmental assessment.</p> <p>Enhance understanding of impacts of all dimensions on the overall value chain</p> <p><b>Aquaculture standard for sustainability needed</b></p>	<p><b>-Guidelines for “International” Social and economic references for sustainability</b></p> <p>Evaluate <b>sustainability indicators</b> and support <b>CSR reporting</b></p> <ul style="list-style-type: none"> <li>– Applied research required</li> <li>– <b>Liberation of data</b> (analysis and communication)</li> <li>– Knowledge sharing</li> <li>– Responsive science</li> </ul>	<p>- <b>FAO guidelines</b> expanded for social aspects, based on <b>ILO standard</b>, international treaties and national laws</p> <p>-Policy implication includes <b>multi-stakeholder and pre-competitive initiatives</b> e.g. the <b>Vigo Dialogue</b> and an international framework to motivate initiatives to develop guidelines on working conditions.</p>
<p><b>Certification</b></p> <p><i>Too many certification schemes</i></p> <p><i>Audits</i></p> <p><i>Cost</i></p>	<p>Multiple certifications impose cost and a burden for producers.</p> <p>The problem is <b>data collection and multiple audits</b></p>	<p>=&gt; <b>Simplify the certification</b> processes and make standards or guidelines (checklists) accessible to motivate harmonisation</p> <p>=&gt; One certification instead of multiple</p> <p>=&gt; Develop a cost-effective tool / framework for standards /checklists available on-line</p> <p>- <b>Benchmarking of labels =&gt; role for GSSI</b></p>	<p>- Electronic documentation of performance to simplify auditing</p> <p>- Facilitate <b>integration of public authorities and certification schemes</b> (EU ecolabel?)</p> <p>Expand the scope of environmental standards and include social aspects? <b>OR</b></p> <p>A new standard for socio-economic performance ?</p>	<p>- Governance: Better and strong presence at <b>EU Commission</b> level on the control / monitoring</p> <p>- Collaboration of <b>national governments, standards /certification schemes and industry</b></p> <p>- Commitment of the <b>value chain</b></p>

	Challenges - Weakness	Opportunities <i>Future trends - Research input</i>	Way forward ? <i>Future trends - Research input</i>	Who is responsible? <i>Private v.s. public initiatives</i>
<i>Cost of certification v.s. competitiveness</i>	<p>Certification may not be profitable and does not necessarily pay premium</p> <p>Sustainability certification as an investment - <b>premium on sales is not guaranteed</b></p>	<ul style="list-style-type: none"> <li>– <b>Optimisation of the cost in the chain</b></li> <li>– push the cost of certification forward in the chain</li> <li>– Price differentiation ?</li> <li>– Consumer preferences</li> </ul>	<ul style="list-style-type: none"> <li>– Larger unit of the certificate</li> <li>– <b>Improvement projects</b></li> <li>– <b>Innovation, new markets</b></li> </ul>	<p><b>Industry initiatives</b> – communication and collaboration of all stakeholders in the supply chain</p>
<i>Impact of certification</i>	<p>Certification on sustainability is not necessarily a <b>proof of sustainable performance</b>, since sustainability criteria are not defined in a holistic way.</p> <ul style="list-style-type: none"> <li>– <b>Impact of sustainability certification is very unclear</b></li> <li>– Just audit for <b>reputation?</b></li> <li>– No guarantee for more sustainable behaviour?</li> </ul>	<p>- Certification can <b>motivate improvements</b> and more credible performance. =&gt; improved sustainability of the sector =&gt; <b>market entrance</b> =&gt;<b>reputation of businesses</b> =&gt;highlight a positive aspect of fishery industry</p> <p>- Evidence of positive impact led by certification:</p> <ul style="list-style-type: none"> <li>– <b>Traceability</b></li> <li>– Lower risk of species substitution (fraud)</li> <li>– Price differentiation</li> </ul>	<ul style="list-style-type: none"> <li>– Create a baseline for sustainability, then there is an opportunity to move forward and create a niche.</li> <li>– <b>Improvement projects</b></li> <li>– <b>Innovation, new markets</b></li> </ul>	<p><b>Industry initiatives and international guidelines</b></p> <p><b>Certification standards</b> – 3rd party verification.</p> <p><b>Communication and collaboration of all stakeholders in the supply chain</b> (retailers, suppliers)</p>
<p><b>Sustainability assessment</b></p> <p><i>Sustainable products</i></p>	<p>Assessment for who? =&gt; the <b>consumers</b> but they may not understand the assessments</p> <p>Sustainability v.s.</p> <ul style="list-style-type: none"> <li>– low priced</li> <li>– quality</li> </ul> <p>Need for other measures?</p>	<p>Enable consumers to choose sustainable products =&gt; <b>simple information</b> at the consumer level (A-B-C-D-E): „A“ = sustainable product (econ, env. and social) <b>OR</b> =&gt;„ <b>in 20 years</b> time there will be <b>no need for labelling</b> in supermarkets“?</p>	<ul style="list-style-type: none"> <li>– <b>Applied research required</b></li> <li>– Liberation of data (analysis and communication)</li> <li>– <b>Knowledge sharing</b></li> <li>– Responsive science</li> </ul> <p>Where will we be in <b>2030?</b> <b>Assumed sustainability!</b></p>	<p><b>EC, national governments, multistakeholder</b> approach</p> <p>Communication and collaboration of all stakeholders (buyers, sellers, retailers) and <b>engage consumers</b></p>

	Challenges - Weakness	Opportunities <i>Future trends - Research input</i>	Way forward ? <i>Future trends - Research input</i>	Who is responsible? <i>Private v.s. public initiatives</i>
<p><i>Scope of sustainability assessment and certification</i></p> <p><i>What to assess, at what level and how?</i></p>	<p><b>Large fisheries vs small scale fisheries (SFS)</b></p> <p>The scope of the <b>sustainability certifications is only covering ~20-30%</b> of the sector („the low hanging fruits“), SFS are not included</p> <p>In the future, need to assess 70-80 % of all fisheries?  - Assessment at an individual/vessel level may be <b>too costly</b> for SCF  - Overfishing has been a problem and <b>condition of the stocks is not verified</b>  - small scale fisheries cannot afford to perform <b>stock assessment</b>=&gt; <b>lack of data</b> is a bottleneck</p>	<p>-- &gt; need to have a broader/larger assessment (<b>group certification, benchmark, risk assessment...</b>) and distinguish between small scale fisheries and larger one's</p> <p>Development of <b>standards aligned to the needs of SFS</b></p> <p>Internationally recognised as legal and ethical fishing</p> <p><b>Short term vs long term</b></p>	<p>Certification may not be the future for sustainability assessment =&gt; common checklist, <b>benchmark</b>, 2<sup>nd</sup> party auditing ...</p> <p>=&gt; stock assessment for mixed fisheries needed / multispecies catching areas</p> <p>Fisheries assessed at the same level.....standard</p> <ul style="list-style-type: none"> <li>- <b>Applied research required</b></li> <li>- Liberation of data (analysis and communication)</li> <li>- Knowledge sharing</li> <li>- Responsive science</li> </ul>	<p>- <b>CFP</b></p> <p>=&gt; resistance from the sector =&gt; need for a <b>national / regional plan for sustainable sourcing</b></p>

	Challenges - Weakness	Opportunities <i>Future trends - Research input</i>	Way forward ? <i>Future trends - Research input</i>	Who is responsible? <i>Private v.s. public initiatives</i>
<p><b>Policy options</b></p> <p><i>Too many and complicated regulations / norms</i></p>	<p><b>5 key points:</b></p> <ul style="list-style-type: none"> <li>-<b>Make the regulation simpler and enforceable</b> (over-regulation / <b>reevaluation of rules</b>)</li> <li>-Decentralization / Regionalization / devolution of power</li> <li>-<b>Guidelines</b> for “International” Social and economic references</li> <li>-pre-condition for accessing <b>EU market</b></li> <li>-criteria for public tenders (incl. schools / hospital... canteens)</li> </ul>	<ul style="list-style-type: none"> <li>-Fishermen = entrepreneurs - &gt;need to adapt -&gt;need for flexibility</li> <li>-&gt;<b>avoid too stringent regulations</b></li> <li>-&gt;<b>ensure transparency</b></li> <li>-&gt;<b>Reduce uncertainty</b></li> </ul> <p><b>Policy as steward of sustainable sourcing</b></p> <ul style="list-style-type: none"> <li>-Guidelines</li> <li>-Tender for suppliers (e.g. school)</li> <li>-Pre-condition for accessing public funds</li> <li>-Guidelines for 3rd countries to access EU Market</li> </ul>	<ul style="list-style-type: none"> <li>- Need for <b>deregulation ; devolution / delegation of power</b></li> <li>- Need for integration of <b>Ecosystem approach</b>, incl. the social dimension (e.g. ICES scenarios + economic and social criteria</li> <li>- Need for <b>evaluating the rules in place</b> (policy is creating new rules; never deleting rules)</li> <li>- Facilitate the access to (EU) funds, especially for SSF</li> </ul>	<p><b>Role of policy:</b></p> <ul style="list-style-type: none"> <li>-improving and monitoring the <b>status of fish stocks</b></li> <li>-<b>avoiding unfair competition</b> (incl. social standards)</li> <li>- <b>Setting the playing field</b> between food commodities (incl. through ‘compensating’ for the impacts of policy decisions)</li> </ul>
<p><b>IUU – illegal, unregulated, unreported</b></p> <p>Address different issues Focus illegal fishing: linked to labour slavery, mislabelling and safety</p>	<p>Why do people fish illegally?</p> <ul style="list-style-type: none"> <li>- <b>governments fail to tackle IUU</b>, “not strong enough”, issue of implementing rules and controlling, difficult to control</li> <li>- no social concern in some countries</li> <li>- media coverage is often there – no blaming and shaming</li> </ul> <p>In EU, IUU is not a big issues, <b>70% of IUU is in developing countries</b></p>	<ul style="list-style-type: none"> <li>- Trade of IUU species is more frequent in <b>small scale markets</b>, more controls, fear of increasing controls may provide incentive for people to stop, fear of getting caught</li> <li>- <b>Mislabelling</b> is linked to IUU. More controls, but more importantly <b>training, capacity building</b> also at the landing so that people recognise fish species, <b>application of new technologies</b></li> </ul>	<ul style="list-style-type: none"> <li>- <b>Harmonising the IUU rules world-wide for all countries</b>, in order to achieve a <b>level playing field.</b></li> <li>-Improvement of data on IUU</li> <li>-No illegal fishing in the EU would increase competitiveness – <b>non IUU foster competitiveness</b> (competitiveness on quality)</li> </ul>	

	Challenges - Weakness	Opportunities <i>Future trends - Research input</i>	Way forward ? <i>Future trends - Research input</i>	Who is responsible? <i>Private v.s. public initiatives</i>
Control	<p>-Current control amongst others ban of discharge add lots of uncertainty, <b>lack of data</b>. It impacts prices potentially.</p> <p><b>-Control measures are costly</b> and difficult to manage, possibility for innovation</p> <p>-What are the incentives of not fishing illegally?</p>	<p>Need for <b>developing an incentive system</b> that encourages <b>actors along the chain to combat IUU</b>.</p> <p><b>IUU is related to control of landing – landing obligation</b> may cause result in cases of unsustainable fisheries</p>	<p>Does an increased control help? Is increased control effective?</p> <p>Is increased control enough? And there are some contradictions in the regulations, consistent regulations and controls</p>	<p><b>Role of government</b> to put countries not considering IUU under pressure. The market needs to be big enough such that possible fall of fish exports may matter to the country not meeting the rules.</p>
Cost	<p>Costs of illegal fishing, in terms of <b>surveillance</b>, the damage caused...</p> <p>Who should pay for the controls? Consumers? However, IUU is a criminal activity thus <b>role of government, customers who buy IUU fish</b> should also be made responsible and punished.</p>	<p><b>Full traceability</b> may help, full traceability also for developing countries as a requirement to supply fish not only on markets of industrialised countries but also developing countries. How can this be guaranteed?</p>	<p>“New colonialism” – Should developed countries, in fact Europe, tell developing countries how they should manage their fisheries, fish stocks, and require sustainability in their own country?</p> <p>-Would this not be new colonialism that impedes the sovereignty of developing countries?</p> <p><b>-Need to engage developing countries and they should decide to tackle IUU in their countries themselves</b></p>	<p><b>-Controlling IUU that is multi-layered along the chain (different parties involved)</b> is complex and requires considerable expert knowledge - <b>Can government</b>, esp. in developing countries, <b>cover the costs of tackling IUU?</b></p>

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Control measures	About the causes of illegal fishing not much is known and little research is conducted.	Need for research in order to develop accurate solutions New tools for controlling for the IUU issues are being developed:	- <b>Defining the role of the government and the private sector in the IUU issues</b> - Regulations on IUU exist, interest in investigating the measures per se. Do they actually work? Which measure works for whom and for what IUU issues? Taking for example of the EU ban.	The way forward is in particular on the <b>governmental side</b> : implementation of <b>international treaties, increased controls, treatment when breaching IUU rules</b> -> shame and blame but also fine, depending on quantity of fish caught.
Transparent traceability	- Certification is assessment and verification but this is not a solution for illegal fishing. - <b>Certification</b> could be helpful <b>providing incentive</b> not to fish illegally.	- <b>Transparent traceability</b> : where does the fish actually come from? In order to identify the origin, DNA techniques can be applied (identify check)  -New technologies – GPS and satellite techniques to locate vessels. DNA testing.  -Black lists – identifying vessels, companies engaged in IUU, reporting them and possibility for “blaming and shaming”  -Vessel audit  - <b>Risk assessment</b> at fleet and vessel levels		The way forward for <b>businesses is to request IUU certificates and engage in checking/controls</b> , too. Business should focus on <b>transparency</b> along the entire chain.