

Axis 4 Factsheet: GERMANY

Geographical map: Germany



1. Context in which Axis 4 is being developed and main challenges faced

The German coastline is 3 524 km long and divided between the North Sea to the West and the Baltic Sea to the East. With 28% of Germany's foreign trade being shipped through German seaports, maritime transport holds significant economical importance in coastal areas, relegating fisheries to a secondary economical role.

Fisheries activities in Germany are made up of both marine and freshwater activities, the latter being dominated by inland aquaculture. Total value of primary production in Germany in 2007 accounted for around €260 million representing about 2% of total EU production. And while marine catches represented 77% of all German landings, they only produced 46% of the total value whereas aquaculture accounted for the other 54%.¹

German inland fisheries include river and lake fishing (less than 1% of annual landings), as well as aquaculture, dominated by extensive carp farming in ponds and trout farming. Within the EU, Germany occupies the third place in carp production after Poland and the Czech Republic, with a share of over 20% of total EU tonnage. Whereas larger enterprises operate in Saxony, the Bavarian carp farming sector is characterised by a large number of part-time businesses, under pressure from unfavourable economic and market conditions.. Extensive carp farming is of considerable importance for landscape conservation and the promotion and support of carp farming in ponds have always been high on the political agenda.

The marine fishing fleet is represented by both offshore and inshore fishing vessels, including small-scale coastal fishing vessels. These companies are based in the numerous small and medium-sized ports on the North Sea and Baltic coasts. They are also an important component of the regional tourist industry. The distant waters fishing companies are based in Bremerhaven, Cuxhaven and Rostock.

Employing around 16 000 persons, fisheries and aquaculture account for approximately 0.1% of total national employment. Almost 70% of these jobs are in fish processing, placing the German fish processing sector as the 4th largest in the EU². Employment levels in the fleet have suffered severely from capacity reduction and declining fishing opportunities in recent years³.

2. The national response in terms of Axis 4

Development under Axis 4 supports the regional development strategies of fishing ports and rural municipalities. The essential objectives of priority Axis 4 in Germany are:

- The sustainable development and improvement of the quality of life in the fisheries areas
- The diversification for employees in pond farming
- Maintaining the typical landscape and building features of the fisheries areas
- Enhancing the attractiveness of the areas for tourists

¹ Eurostat 2008

² Employment in the fisheries sector: current situation (FISH/2004/4)

³ EFF Operational Program

3. The areas and their key characteristics

With the exception of the towns, the 6 regions concerned have low population densities, and stand out for their low disposable income and high unemployment rate. The areas in Mecklenburg-Western-Pomerania have an unemployment rate of around 22% while the average unemployment rate in Saxony is 17%, for example.

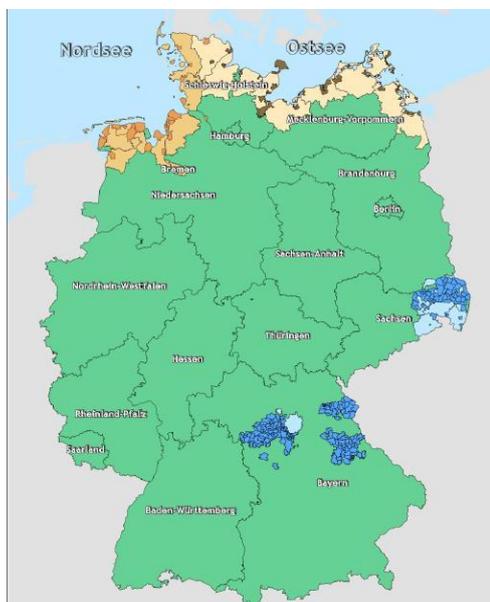
<u>Fishery area</u>	<u>Surface Area/ km²</u>	<u>Population</u>	<u>Pop density/ inhab/km²</u>
Lower Saxony - North Sea coast (1 FLAG)	1 598 km ²	210 813	132
Bremen - Bremerhaven Fishing Port (1 FLAG)	4.8 km ²	319	66
Schleswig-Holstein - North Sea (5 FLAGS)	267 km ²	62 917	236
Schleswig-Holstein - Baltic Sea (6 FLAGS)	783 km ²	443 131	566
Mecklenburg-Western Pomerania - Baltic Sea PESCA areas (5 FLAGS)	10 352 km ²	866 663	84
Bavaria - 4 carp farming regions in Oberpfalz, Mittel and Oberfranken (4 FLAGS)	7 319 km ²	720 718	98
Saxony - Carp farming region (Oberlausitz – Niederschlesien) (1 FLAG)	4 335 km ²	532 226	123

The fishing port of Bremerhaven was selected as fisheries area in Bremen because this industrial area is of outstanding importance for the local economic development. As a result of the deployment of considerable resources in the past (PESCA, FIGG), it was possible to convert the region into a mixed industrial area which is becoming less dependent on the fishing industry. The aim of the Bremen policy is to push ahead with this diversification process through an innovation-oriented development and growth strategy. In this respect, specific focus is placed on the creation of network and cooperation structures between local R&D potential and the producing industry in the fishing port.

In Schleswig-Holstein, the fishing industry is mostly concentrated around the landing ports of the coastal regions. Therefore the selection criterion was the cities and municipalities in the rural districts in which landing ports are located. The economic development of the locations and towns in these coastal regions was in the past heavily dependent on fishing and fish processing. The fishing industry today has clearly lost some of its direct economic importance but at the same time, the remaining “cutter”⁴ businesses are assuming a key role as a tourist attraction. The diversification of income possibilities through the tourism sector is therefore to be promoted in particular.

In Mecklenburg-Western Pomerania, the towns and municipalities already identified as regions for the PESCA Community initiative were selected as fisheries areas. These areas are not identified through the economic importance of the local fisheries sector, but rather through the continuous presence of fishing families in these towns and municipalities since the beginning of the century. The focus of the Axis 4 strategy is therefore on financial and organisational efforts to open up additional income possibilities outside the fishing industry for these families.

In Bavaria and Saxony, the traditional, geographically and economically cohesive regions of carp farming of Oberpfalz, Mittel- and Oberfranken and Oberlausitz-Niederschlesien have been defined as



⁴ Cutters are small to medium size coastal fishing boats found commonly in northern Europe

fisheries areas. Preserving the specific features of these natural habitats and developing their touristic attractiveness are the most important objectives for Axis 4 support in the region. These areas have a clear territorial approach and will strongly promote the diversification of income possibilities.

4. The selection process

Due to the federal structure of Germany the selection of FLAGs is carried out at the *Länder* level. As the following overview shows, the selection process was organised differently in the various *Länder*, reflecting for example the existing experiences with PESCA, the design of LEADER and/or the administrative and political preferences of the different *Länder*.

Lower Saxony: Given the proven cooperation between the coastal rural districts in the field of economy and tourism, at the willingness of the local actors (bottom-up principle) an independent group was established for the entire area.

Bremen: The local group is made up of local actors from the area and will take independent decisions on the basis of the strategy for the area. An existing fisheries working group served as the basis for the FLAG, by extending it to further local stakeholders.

Schleswig-Holstein: In Schleswig-Holstein for reasons of effectiveness and to enable synergies, the FLAGs are strongly linked with the LEADER groups. "Fisheries" working groups are created within the LEADER groups and these working groups are tasked with the FLAG responsibilities, including the selection of projects. The fisheries strategy becomes an integral part of the strategy of the LEADER group.

Mecklenburg-Western-Pomerania: In Mecklenburg-Western-Pomerania the FLAGs are also closely linked to the existing LEADER groups. The selection of the FLAGs to implement Axis 4 of the EFF was organised via a call of tender opened to the existing LAGs.

Bavaria: An independent group was set up for each of the four carp pond areas (fisheries areas) with uniform rules of procedure.

Saxony: The "Marketinggesellschaft Oberlausitz-Niederschlesien mbH (MGO)", an existing, experienced organisation with sufficient administrative capacity and considerable experience in the implementation of the LEADER programme, was selected as the lead partner of the FLAG in Saxony.

5. The groups

From the areas mentioned above, a total of 23 FLAGs were selected in Germany. In two of the six *Länder* (Schleswig-Holstein and Mecklenburg-Western-Pomerania) the FLAGs are strongly linked with LEADER.

In general the FLAGs in Germany represent a variety of actors: 1) from the public and private sector, 2) from different socio-economic sectors (i.e. fisheries, tourism, agriculture) as well as 3) civil society. The improved networking between the different actors of the area is an explicit objective of the FLAGs. The concrete focus and size of the partnership varies from FLAG to FLAG, whereas a special focus in all groups lies on a representative participation of actors from the fisheries sector, although this is not always easy to achieve. Typical actors of the fisheries sector in the FLAGs include full-time and part-time fishermen, fish processing companies, harbour organisations, fish producing communities, consultants of the fishery sector, anglers and representatives of fishing associations from the regional or the *Länder* level.

6. The strategies

The strategies of the FLAGs have been developed at the local level, in a bottom-up approach with the participation of the above mentioned actors. These strategies include an analysis of the situation, the problems and opportunities of the area, followed by the objectives and measures the FLAGs want to pursue as well as first project ideas. The development of these "integrated strategies for the local development of the fishery area", in some cases supported by consultants, was the precondition for the approval of the FLAGs.

Bearing in mind the bottom up development process of the strategies and the different local contexts the 23 FLAG strategies vary from area to area. However, some of the recurring strategic elements include:

Strategic objectives:

- improving the economic and social situation of fishermen
- improving maritime infrastructure, for example, in harbours
- sustainable use of aquatic resources
- development and marketing of fisheries products in the tourism sector
- preservation of cultural heritage
- improving the image of the local fishing sector
- higher regional value added through regional fish-processing

Principles by which to reach objectives

- integration of different sectors and utilisation of synergies
- focus on the fisheries and the tourism sector and their connections
- development of the existing range of products
- valorization and strengthening of the local specific potential
- focus on light house projects
- development of regional value chains
- labelling of regional products
- extensive participation of stakeholders through a bottom-up approach
- networking between actors
- voluntary engagement

An example of a “strategic vision” can be illustrated with the following quote taken from the strategy of the fishing area of the Lower-Saxony North-Sea coast. The strategic vision is defined as follows:

“A region where fishing continues as a living tradition and profitable economic activity and serves as an attraction for tourists in the framework of a typically regional, competitive, authentic and balanced tourism product. Tourism and fishing contribute to the sustainable development of the region through growth and job security and creation.”⁵

7. Germany’s EFF budget 2007-2013 and funding from national and regional level

% of EFF funding on Axis 4	EFF funding on Axis 4 /€	National/ Regional funding /€	Total Public Funding/€	Average Budget per group/€	Number of Groups
12.47%	19 438 000	14 146 000	33 584 000	1 460 173	23

8. Networking and capacity building.

The German National Network (NN) was formally established in the second half of 2011, following agreement by the six German *Länder* that participate in Axis 4 of the (EFF) and the Federal Ministry of Food, Agriculture and Consumer Protection. The NN is coordinated by two FLAGs (Bremerhaven and Lower Saxony) which are assisted by an advisory group of six experts. These experts are also part of the NN and come from different *Länder* with a variety of skills and competences. Members include: the Managing Authority, the FLAGs, inland fisheries and marine fisheries representatives as well as the FARNET geographic expert for Germany. Conceived as a testing ground for networking activities, the current NN disposes of a limited budget to which all *Länder* implementing Axis 4 contribute.

⁵ Cofad (2007) Strategie für eine integrierte örtliche Entwicklung des Fischwirtschaftsgebiets Niedersächsische Nordseeküste

The main priorities for the NN are to:

- strengthen the linkages between the 23 German FLAGS
- foster knowledge exchange and collect best-practice examples
- support thematic work, for example on pesca-tourism
- address technical issues faced by the FLAGS
- ensure the active participation and cooperation of key persons in the fisheries areas (e.g. fishermen), in order to preserve the “bottom up approach”
- be an advocacy group, the “voice” of the German FLAGS, to pool and concentrate the opinions of the FLAGS in the context of a constructive, critical dialogue with national Managing Authorities and the European policy level

The future activities of the NN, based on collaboration with its members, include:

- a publication about the different German fisheries areas, their fisheries products and their touristic potential
- a collective exhibition / trade fair of all the German FLAGS, using the slogan “*Fisch aus deutschen Landen*” (“Fish from German Regions”)
- the establishment of a German Axis 4 Group on Linked-In

9. Resources or ideas of interest to other countries

- Leaflet of the Federal Ministry on the EFF:
http://ec.europa.eu/fisheries/cfp/structural_measures/pdf/Fep_brochure_DE.pdf
- The Federal Ministry and *Länder's* portal on fisheries in Germany: <http://www.portal-fischerei.de/>
- “Bremerhaven fishing port showcase”: <http://www.schaufenster-fischereihafen.de/>
- The site of the German Network Unit for LEADER groups (DVS - Deutsche Vernetzungsstelle) which provides interesting information on local development: <http://www.netzwerk-laendlicher-raum.de/>

10. Contacts and links

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