



# **FARNET Support Unit TECHNICAL REPORT**

Providing information on present and future EMFF support  
to small-scale coastal fisheries through FLAGs

**June 2017**



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EUROPEAN COMMISSION – Directorate-General for Maritime Affairs and Fisheries

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# HIGHLIGHTS

## OBJECTIVE & METHODOLOGY

- The objective of the study is to assess the **level of support** channelled **through the Fisheries Local Action Groups (FLAGs) towards Small-Scale Coastal Fisheries (SSCF)**.
- The definition of Small-Scale Coastal Fisheries used for this survey is based on the definition of the regulation 508/2014 but adapted to account specifically for inland fisheries and on foot fishing/shellfish gathering.
- A **response rate of 30%** was achieved for information related to the 2007-2013 period while 50% of existing FLAGs (280 by February 2017) answered the 2014-2020 related questions.

## FLAG PROJECTS 2007-2013 (EFF)

- An estimated **2682 projects were targeted at Small-Scale Coastal Fisheries in the period 2007-2013** what accounts for around **23% of FLAG projects** of the 2007-2013 period
- The share of projects targeting SSCF jumps to around 40% if inland areas without commercial fishing are taken out of the population. In other words, those **FLAGs** where SSCF was potentially present **devoted around 40% of their projects to support that segment** of the fleet.
- **Areas with important inland commercial fishing activities** (Finland, Estonia) were **heavily supported** by FLAGs.

## FINANCIAL SUPPORT 2007-2013 (EFF)

- The level of **total public support** (EFF and national co-financing) channelled through the FLAGs in support of SSCF for the period 2007-2013 can be estimated at **around EUR 140 million** (of which around EUR 90 million EFF and 50 million national co-financing).
- This represents close to **20% of the total public money** available to the FLAGs in the period 2007/2013.
- The share of the budget devoted to SSCF **increase to close to 30%** of total public expenditure if inland areas without commercial fishing are taken out of the population. In other words, those FLAGs where SSCF was potentially present devoted around 30% of their budget to support that segment of the fleet.

## PROJECT SIZE and TYPES of project (EFF)

- The **average size** of SSCF projects supported by FLAGs amounts to **around EUR 41 000**. This is below the average project size of around EUR 62 000. **SSCF projects** are therefore **generally smaller** than other types of projects financed by Axis 4.
- The two more popular categories of projects are those linked with **product promotion** and support to **diversification of activities outside fisheries**. Supporting forms of **diversification within the sector** itself and **support to small scale infrastructure and working conditions** come not far behind.
- The **least common** projects are those linked with supporting **governance of SSCF** and **improving the place of women** in the sector.
- The types of project supported vary **very much per Member State**.

## **FORESEEN FINANCIAL SUPPORT 2014-2020 (EMFF)**

- **Financial support to SSCF is expected to increase** in the current period with several elements pointing in the same direction.
- An **estimate of EUR 210 million** is proposed but should **be treated with caution** as it represents a 13% increase in the level of support compared to the period 2007-2013. In absolute terms, this represents an increase of around EUR 70 million.

## **NON-FINANCIAL SUPPORT**

- **90% of FLAG surveyed** have provided or envisage to **provide non-financial type of support** to SSCF.
- Support to **access funding from other programmes** and **support to foster collaboration with other stakeholders** are the two most common non-financial types of support FLAG provide to SSCF.

## **IMPORTANCE OF SSCF in FLAG AREAS**

- Clear tendency for **FLAGs to be located in areas with strong SSCF presence**: 50% of surveyed FLAGs report SSCF to represent 80 to 100% of the fisheries sector locally.
- Strong but not systematic **relationship between the importance of SSCF locally and the budget devoted by FLAGs to support SSCF**.

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## List of acronyms

CFP	Common Fisheries Policy
CLLD	Community Led Local Development
EFF	European Fisheries Fund (2007-2013)
EMFF	European Maritime and Fisheries Fund (2014-2020)
ESIF	European Structural and Investment Funds
EP	European Parliament
FLAG	Fisheries Local Action Group
FSU	FARNET Support Unit
LDS	Local Development Strategy
MS	Member State(s)
SSCF	Small-Scale Coastal Fisheries

## 1. Introduction

Calls for greater levels of support to Small-Scale Coastal Fisheries<sup>1</sup> (SSCF) have been on the rise since the adoption of the reformed CFP of 2012 and of the new fund for its implementation the European Maritime and Fisheries Funds (EMFF; 2014-2020). For instance, the European Parliament (EP) has recently produced a report on innovation and diversification of small-scale coastal fishing in fisheries-dependent regions<sup>2</sup> which calls for an increase of support to small-scale coastal fisheries in the EU. The EP has also launched a study looking at the linkages between blue growth and SSCF, and the ways to ensure the benefits of blue growth spill over to SSCF.

In addition, the Committee of the Regions recently published an opinion<sup>3</sup> arguing that regaining the trust of local fishermen should be a central concern for the EU's legislators, adding that small-scale fishermen should have a greater role in the stewardship of the sea and should be able to operate on a level playing field with larger-scale fishing businesses.

It appears, however, that Member States (MS) and stakeholders are not taking full advantage of the numerous existing funding possibilities under the European Maritime and Fisheries Fund (EMFF) in favour of SSCF and that ways of facilitating the channelling of this support to the SSCF sector should be explored and/or developed.

Fisheries Local Action Groups (FLAGs) are one of the possibilities offered by the EMFF to reach out to SSCF. Indeed, while FLAG support is not restricted to a specific segment of the fleet, in practice the SSCF sector is the natural partner of most FLAGs. This segment has close ties with its territory and is also likely to be most interested by the focused type of support a FLAG can provide.

Still the extent to which FLAGs have been supporting SSCF is unclear. This report aims to provide an indication of the level of support provided by FLAG to SSCF. It is based on a survey which has been carried out among FLAGs from both the EFF and EMFF periods which were asked to assess the level of support channelled to SSCF through their Local Development Strategies (LDS).

This report will be completed by a series of case studies which will help to provide recommendations on how FLAGs can better support SSCF thus further contributing to the related objective of the EMFF.

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<sup>1</sup> Art.3 of Regulation 508/2014 defines 'small-scale coastal fishing' as fishing carried out by fishing vessels of an overall length of less than 12 meters and not using towed fishing gear as listed in Table 3 of Annex I to Commission Regulation (EC) No 26/2004 (2);

<sup>2</sup> Committee on Fisheries, (2015/2090(INI)), <http://www.europarl.europa.eu/sides/getDoc.do?pubRef=-//EP//TEXT+REPORT+A8-2016-0044+0+DOC+XML+V0//EN&language=en>

<sup>3</sup> NAT-VI/011 CDR 2898/2016 EN; <http://cor.europa.eu/fr/news/Pages/local-fishermen-should-be-at-heart-of-eu-fisheries-policy.aspx>

## 2. Methodology

The survey was designed to maximize the response rate and extract information regarding FLAG support provided in the previous period (2007-2013) as well as estimate the expected level of support in the current period (2014-2020). It was therefore deliberately limited to nine questions. In addition, for several questions (budget devoted to SSCF for example), FLAGs were asked to provide a range which best describes their level of support to SSCF rather than an exact figure as to our knowledge no FLAGs have been monitoring their action in terms of SSCF support specifically.

Asking for an exact figure would have required an important effort on behalf of FLAGs in a period where most of them are either busy starting up their operations or in the last stage of the selection process. In addition, as no data would have been readily available many FLAGs could have felt very uncomfortable having to provide an exact figure.

The survey was sent to all FLAGs from the past period (312 FLAGs) as well as to all FLAGs selected for the current period at the time of the launch of the survey (280 in February 2017). Due to some overlap between the two groups, the survey was made up of two parts (see Annex 2 for the complete survey):

- a common part to all FLAGs (both new and former FLAGs),
- a part which was only available to FLAGs already existing in the 2007-2013 period.

The common part was limited to information about the FLAG and helped to distinguish between “former” and “new” FLAG. It included a question on the share of SSCF in the territory as well as the expected level of support in the 2014-2020 period.

Those FLAGs identified as already existing in the past programming period were then allowed to answer a series of additional questions on their actions in favour of SSCF in that period.

The survey was translated into five languages (ES, PL, DE, IT and FR) to encourage FLAG responses and an online data collection form (“jotform”) was created for each language version of the survey to collect the relevant information.

The common part of the survey was answered by 141 FLAGs in total representing close to 40% of the total expected FLAG population of the 2014-2020 period<sup>4</sup> (see Table 1 and Figure 1 below).

Ninety-nine FLAGs took part in the second part of the survey which represents around 30% of the FLAG population of the 2007-2013 period. This is very satisfactory given the fact that many FLAGs had actually ceased to exist at the time of the survey<sup>5</sup>.

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<sup>4</sup> As the survey was sent to 280 existing FLAGs, the actual response rate is close to 50%.

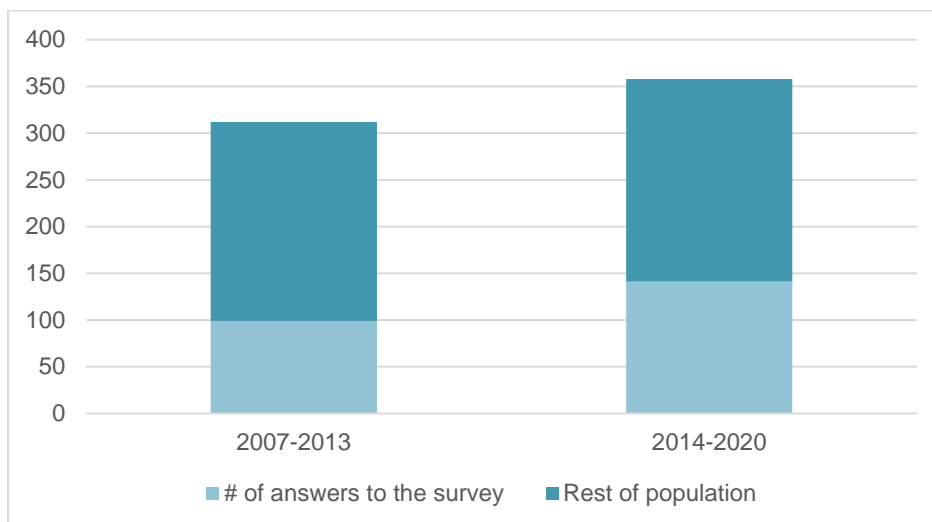
<sup>5</sup> No information was received from Belgium, Cyprus, Netherlands, Lithuania and Slovenia.



Table 1: Number of FLAGs and response rate to the survey

	Survey responses	FLAG population	Response rate
<b>2007-2013</b>	99	312	32%
<b>2014-2020 (new FLAGs)</b>	42	358	Not relevant
<b>Total</b>	141	358	39%

Figure 1: Number of answers to the survey vs total FLAG population for both periods



The definition of Small-Scale Coastal Fisheries used for this survey is based on the definition of the regulation 508/2014 but adapted to account specifically for inland fisheries and shellfish gathering on foot.

It thus includes:

- coastal fishing carried out by vessels of less than 12 meters overall and not using towed fishing gear (i.e. trawl and dredges),
- inland fishing carried out by vessels of less than 12 meters overall not using towed gear,
- on foot fishing and shellfish gathering.

Please note that unless otherwise stated the sources of the figures are our own calculations based on the survey data.

### 3. Results

#### 3.1 Number of projects targeting Small-Scale Coastal Fisheries in 2007-2013 (EFF)

Ninety-five answers were received on the number of projects targeted at Small-Scale Coastal Fisheries during the 2007-2013 period<sup>6</sup>. The share of projects targeted at SSCF represented 43% of the share of total projects supported by the sample (1376 out of 3195 projects).

To extrapolate to the total FLAG population, we have used qualitative knowledge of the different FLAGs per MS to take out those FLAGs where SSCF would not be present in the territory or only very marginally. We therefore took out:

- the Belgian FLAG,
- the Dutch FLAGs,
- all inland FLAGs from Poland, Latvia and Germany (as they do not harbour any significant inland commercial fishing) and
- some inland FLAGs from Romania and Bulgaria (those without commercial inland fishing).

Table 2: Number and share of SSCF projects

MS (BE/NL excluded)	Replies	Response rate total population	Projects dedicated to SSCF by sample FLAGs	FLAGs with SSCF segment	Response rate of FLAG with SSCF segment	FLAG projects with SSCF	Projects targeted at SSCF	Total of Axis 4 projects (a)	SSCF projects by MS
BG	3	50%	73%	5	60%	193	141	232	61%
CY	0	0%	0%	1	0%	28	0	28	0%
DE	10	43%	44%	18	56%	156	68	199	34%
DK	1	6%	27%	18	6%	724	193	724	27%
EE	4	50%	76%	8	50%	725	548	725	76%
ES	18	60%	52%	30	60%	793	416	793	52%
FI	6	75%	86%	8	75%	406	350	406	86%
FR	9	82%	47%	11	82%	333	158	333	47%
GR	7	64%	10%	11	64%	288	29	288	10%
IE	1	17%	46%	6	17%	245	113	245	46%
IT	11	26%	44%	43	26%	202	88	202	44%
LT	0	0%	0%	4	0%	75	0	187	0%
LV	5	21%	4%	10	50%	291	13	698	2%
PL	4	8%	10%	9	44%	996	103	5,311	2%
PT	4	57%	26%	7	57%	217	57	217	26%
RO	3	21%	24%	10	30%	226	53	316	17%
SE	3	21%	22%	14	21%	313	70	313	22%
SI	0	0%	0%	1	0%	21	0	21	0%
UK	6	27%	60%	22	27%	473	282	473	60%
<b>Total</b>	<b>96</b>	<b>31%</b>	<b>43%</b>	<b>236</b>	<b>41%</b>	<b>6,704</b>	<b>2682</b>	<b>11,711</b>	<b>23%</b>

Sources: (a) FSU annual implementation report 2015

<sup>6</sup> Projects targeted at small-scale coastal fisheries were defined as those which:

- had as project promotor a small-scale coastal fisherman/woman or a SSCF association
- were run by another type of stakeholder (FLAG, municipality...) but were designed to benefit SSCF primarily (e.g. new pontoon or landing facility etc)

This leaves a population of 236 FLAGs which were likely to provide some level of support to SSCF. We then have applied on a country by country basis the average number of projects in support of SSCF per FLAG extracted from the survey to calculate the number of SSCF projects per FLAG for the rest of the population.

This provides us with a total number of 2682 projects targeted at Small-Scale Coastal Fisheries which account for around 23% of FLAG projects of the 2007-2013 period<sup>7</sup> (see Table 2).

Still the actual rate of support is much higher if the projects of those FLAG not likely to harbour any SSCF mentioned above are taken out. Indeed, Polish inland FLAGs (which do not harbour any significant commercial inland fishing) account already for more than 4000 projects (i.e. more than 30% of total project population). Adding to this figure the projects from the other inland FLAGs not harbouring commercial fishing activities from Lithuania, Latvia, Romania, Germany and Bulgaria gives a total of just above 5000 projects which by default could not have been targeted at SSCF (see Table 3).

Table 3: Distribution of FLAG projects between areas likely to harbour SSCF and those without SSCF

MS	Total Axis 4 projects (a)	FLAGs under Axis 4 (BE/NL excluded)	FLAGs with SSCF	FLAG projects with SSCF	Total number of projects of FLAGs without SSCF	Estimated total of SSCF projects per MS
BG	232	6	5	193	39	141
CY	28	1	1	28	-	-
DE	199	23	18	156	43	68
DK	724	18	18	724	-	193
EE	725	8	8	725	-	548
ES	793	30	30	793	-	416
FI	406	8	8	406	-	350
FR	333	11	11	333	-	158
GR	288	11	11	288	-	29
HR	-	-	0	-	-	-
IE	245	6	6	245	-	113
IT	202	43	43	202	-	88
LT	187	10	4	75	112	-
LV	698	24	10	291	407	13
PL	5.311	48	9	996	4.315	103
PT	217	7	7	217	-	57
RO	316	14	10	226	90	53
SE	313	14	14	313	-	70
SI	21	1	1	21	-	-
UK	473	22	22	473	-	282
<b>TOTAL</b>	<b>11.711</b>	<b>305</b>	<b>236</b>	<b>6.704</b>	<b>5.007</b>	<b>2.682</b>

Sources: (a) FSU annual implementation report 2015

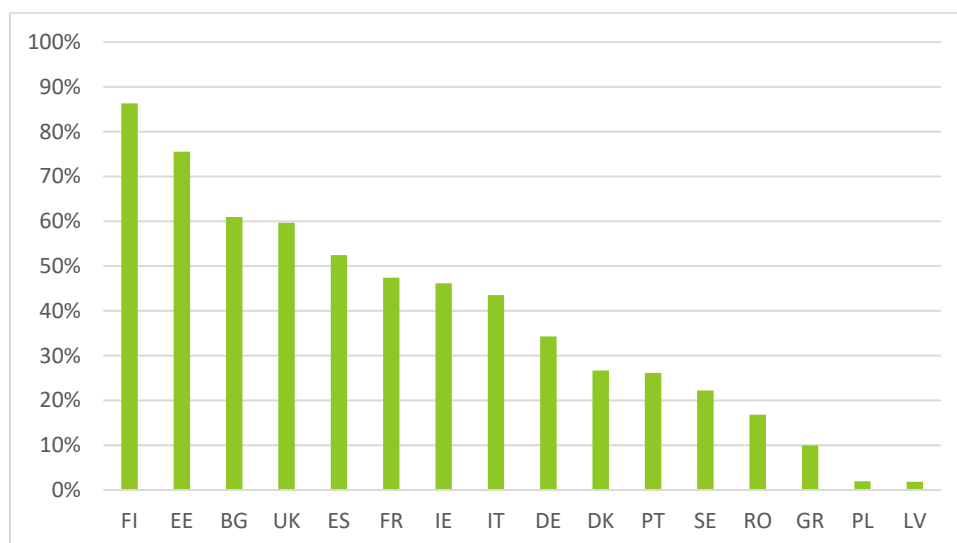
<sup>7</sup> Please note no information was received in the survey from Lithuania, Slovenia and Cyprus. Still given the low number of FLAGs/projects in these countries the missing information could only marginally influence the results of the extrapolation and if anything would contribute to increase slightly the total number of projects supporting SSCF.

Taking out these 5000 projects from the total project population of around 11000 projects, leaves us with a population of around 6500 projects implemented in areas likely to harbour SSCF. The share of projects targeting SSCF in these areas amounts therefore to around 40% (2682 projects out of 6704). In other words, those FLAGs where SSCF was potentially present in their territories devoted around 40% of their projects to support that segment of the fleet.

*N.B.: projects targeted at small-scale coastal fisheries were defined as those which:*

- *had as project promotor a small-scale coastal fisherman/woman or a SSCF association*
- *were run by another type of stakeholder (FLAG, municipality...) but were designed to benefit SSCF primarily (e.g. new pontoon or landing facility etc)*

Figure 2: Share of projects targeted at SSCF by MS



The share of projects aimed at SSCF varies however very much MS by MS (see Figure 2 and Table 2 for figures) with FLAGs in 5 MS (FI, EE, BG, UK, ES) targeting more than half of their projects at SSCF. These five programmes can therefore be considered as primarily being targeted at SSCF. In Finland and Estonia, the share of SSCF projects even accounts for more than 75% of total projects. Interestingly these are two EU MS which possess a strong inland fishing component which was greatly supported by FLAGs.

To deepen the analysis, we should envisage to cross the level of support in the different MS with the size of the SSCF in these different MS. In this respect, at first glance, the level of support provided by FLAGs to SSCF in Greece and Portugal seems low given these two MS have a high number of SSCF operators.

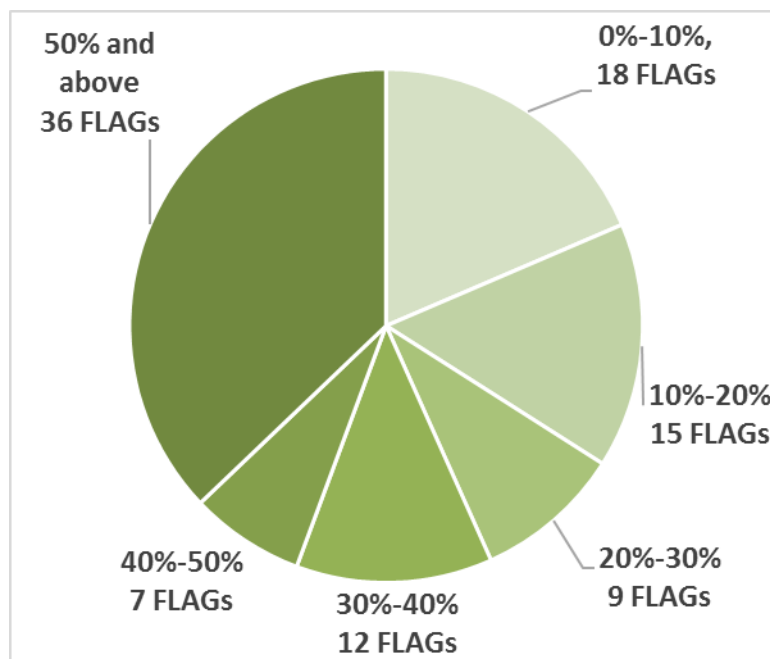
As mentioned above, Poland despite having the largest number of projects overall (more than 5000 projects) only devoted a marginal part of its projects towards SSCF. This can be explained by the domination of inland FLAGs in Poland in the 2007-2013 period (39 out of 48 FLAGs) where no commercial fishing activity is carried out (trout and carp farming are the key water based activities in these areas). The same explanation holds for Latvia where 14 out of the 24 FLAGs were located in inland areas which did not any have commercial fishing activities.

We should mention however that the low response rate in Ireland and Denmark for this question (one answer each) weakens any estimate made on total projects targeted at SSCF for these countries.

### 3.2 Level of financial support 2007-2013 (EFF and national/regional co-financing)

FLAGs were asked in the survey to estimate the share of their total public budget spent on projects targeted at SSCF in the 2007-2013 period. 97 FLAGs provided an answer to this question and the distribution of the answers is highlighted in Figure 3 below. 36 FLAGs have declared having spent more than 50% of their budget supporting SSCF projects in the period 2007-2013. Those 36 FLAGs represent around 37% of the sample.

Figure 3: Share of total public budget 2007-2013 targeted at SSCF per FLAG (n:97)



By crossing the information from the sample with the stated total public available budget for each FLAG an estimate of the total public money invested by the FLAGs of the sample in support of SSCF was carried out. For all classes below 50%, the average of the class was selected to identify the budget devoted to SSCF (i.e. for the class 0%-10%, an average of 5% of the stated total public budget was accounted for. The same applies for all other classes below 50%).

For the “above 50% of the budget” class, we have accounted 100% of the stated budget of those FLAGs who (by answering question 2) had reported that the totality of their projects was targeted at SSCF (9 FLAGs). For the remaining FLAGs belonging to this class we then have accounted an average of 65% of the total public budget available for each FLAG.

This gave us a total of around EUR 56 000 000 devoted by the sample FLAGs to supporting SSCF. This amounts to close to 33% of their available public budget (see Table 4 below)

Table 4: Size and share of the budget devoted by the sample FLAGs to supporting SSCF

Sample size (#FLAGs) (5 FLAGs did not provide their budget)	Total public budget spent towards SSCF by sample FLAGs (EUR)	Total public budget available to sample FLAGs (EUR)	Share of total public budget spent towards SSCF
92	56.825.983	174.890.566	32,5%

In order to extrapolate to the total population (312 FLAGS), as with the estimate of the number of projects, we first have cleaned up the population using qualitative information to take out those FLAGS which cannot have a SSCF segment (76 FLAGS i.e. all PL, LV, DE inland FLAGS; some RO and BG inland FLAGS; BE) or only a marginal one (NL) (see Table 5).

Table 5: Distribution of the FLAG population according to budgetary information and SSCF presence

Total number of FLAGS	# of FLAGS in sample with budget information	#of FLAG with no SSCF segment	FLAG with SSCF without budgetary info
312	92	76	144
100%	29,5%	24,4%	46,1%

We then have calculated the total public budget available to all 144 remaining FLAGS still likely to harbour SSCF in their territory but with no budget information<sup>8</sup>. We have applied to this budget the average percentage found for the sample in terms of budgetary support to SSCF (32,5%) what amounted to an additional EUR 82 million in support of SSCF (see Table 6).

Table 6: Estimation of the total public budget targeted at SSCF by FLAGS out of the sample

FLAG with SSCF without budgetary info	Total public budget available to FLAGS with SSCF out of sample (EUR) (a)	Share of total public budget spent towards SSCF (from sample)	Total public budget spent towards SSCF by FLAGS out of sample (EUR)
144	252 333 600	32,5%	81.989.012

Source: (a) calculated on the basis of the average budget per FLAG stemming from the FSU annual implementation report 2015.

By adding this figure to the budget calculated for the FLAGS from the sample (around EUR 56 million, see Table 4), the level of total public support (EFF and national co-financing) channelled through the FLAGS in support of SSCF for the period 2007-2013 can then be estimated at **around EUR 139 million**<sup>9</sup>.

Table 7: Estimation of the total public budget available to FLAGS targeted at SSCF

Total public budget spent towards SSCF by sample FLAGS (EUR)	Total public budget spent towards SSCF by FLAGS out of sample (EUR)	Estimated total public budget targeted at SSCF in the 2007/2013 period (EUR)	Axis 4 total public budget 2007-2013 (a) (EUR)	Share of SSCF support in Axis 4 total public budget
56.825.983	81.989.012	138.814.994	716 227 887	19,4%

Sources: (a) FSU annual implementation report 2015

In other words, we can say that around EUR 140 million of public money has been invested to support SSCF through the FLAGS in the period 2007-2013. This represents close to 20% of the total public money available to the FLAGS in the period 2007/2013 (Table 7).

Still the share of the budget devoted to SSCF increase to close to 30% of total public expenditure if the budget of inland FLAGS not harbouring any SSCF from Poland, Lithuania, Latvia, Romania, Germany and Bulgaria is taken out of the total public budget available to FLAGS (see

Table 8). In other words, those FLAGS where SSCF was potentially present in their territories devoted around 30% of their budget to support that segment of the fleet.

<sup>8</sup> In this process, we have as well assessed qualitatively the budget remaining to the FLAGS out of the sample to account for the fact that one single FLAG present in the sample already accounted for 50% of the German budget.

Table 8: Share of total public budget targeted at SSCF (excluding budget of those FLAG not harbouring SSCF)

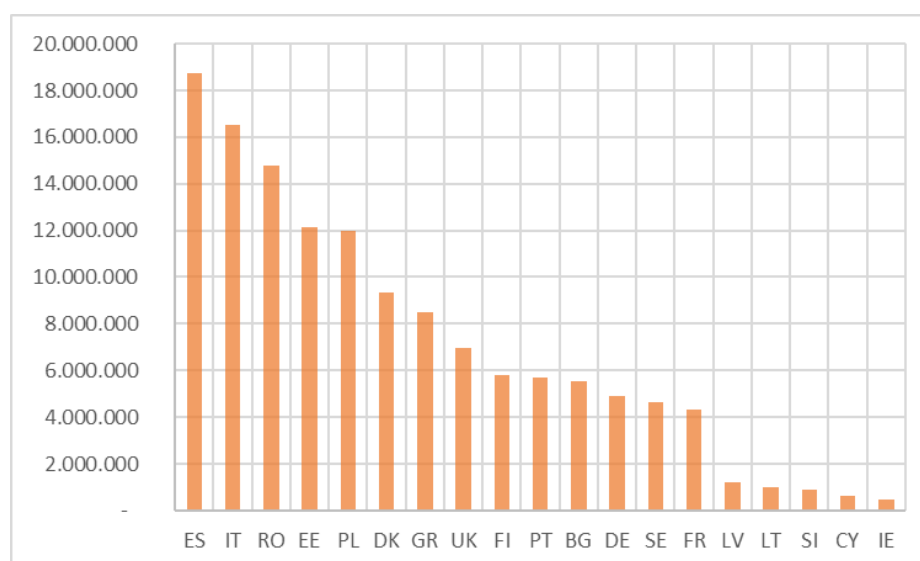
A	B	C (A-B)	D	E (D/C)
Total public budget 2007-2013 (a) (EUR)	Total Public budget of inland FLAGs (PL, LT, LV, RO, DE, BG)	Total public budget of FLAGs likely to harbour SSCF	Estimated total public budget targeted at SSCF in the 2007/2013 period (EUR)	Share of total public budget of FLAGs likely to harbour SSCF
<b>716 227 887</b>	248 110 000	468 117 887	138.814.994	29,65%

Sources: (a) FSU annual implementation report 2015

The total estimated budget targeted at SSCF in the various Member States (see Figure 4) is heavily influenced by the overall available budget. Indeed, the four MS with the largest budgets available under Axis 4 (PL/ES/IT/RO) are also those which devote the most money to SSCF through FLAGs. The order is different however, notably for Poland which possesses by far the largest Axis 4 budget overall (EUR 250 million) but ranks only number 5 in terms of the budget devoted to SSCF (11,9 million). Estonia is a notable exception as while it ranks number 8 terms of total overall Axis 4 budget with EUR 25 million, it is the 4<sup>th</sup> MS when it comes to SSCF support with around EUR 12 million.

In the case of Romania, the high level of support could indicate however a bias in the sample as this level of investment capacity is not at all certain for this sector in this MS.

Figure 4: Total estimated Axis 4 total public budget targeted at SSCF per Member State

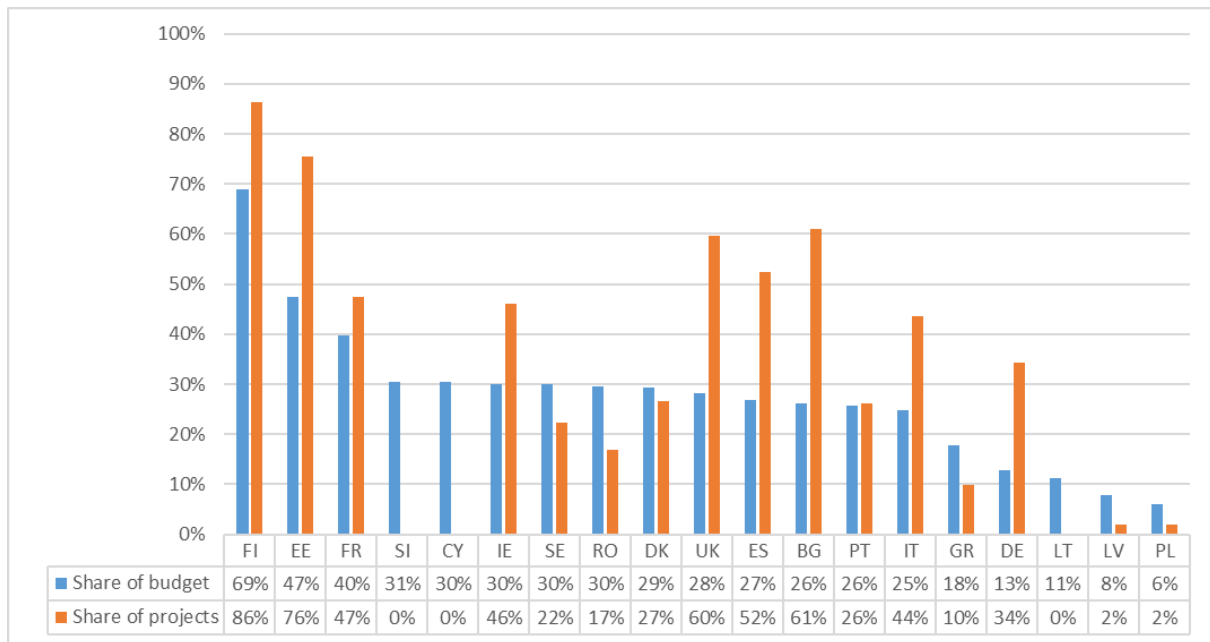


More interesting is the share of the total Axis 4 public budget which is being targeted at SSCF per Member State (in blue in Figure 5 below). The rankings are here completely different than those looking at the available budget. None of the 4 MS with the largest budgets overall and those devoted to SSCF spend more than 30% of their budget on SSCF projects. There is actually a slightly negative correlation between the size of the total public budget available in a Member State and the share of that budget which is targeted at SSCF (see Figure 6 below).

This can indicate a difficulty to spend large amounts of money on projects targeted at SSCF which could be explained by the limited investment capacity of SSCF operators and by the overall small size of

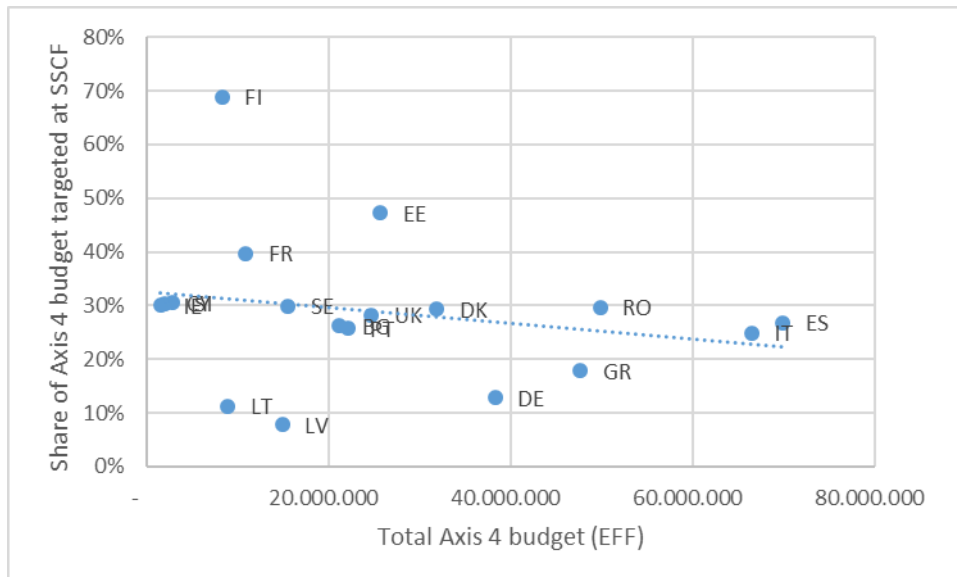
projects led by SSCF. In other words, the transaction costs<sup>10</sup> of supporting SSCF are probably higher than for other types of projects. This can imply the need for a specific strategy and/or system in order to target SSCF effectively.

Figure 5: Share of budget vs share of project targeted at SSCF per Member State



No information available on number of projects from Slovenia, Cyprus and Lithuania.

Figure 6: correlation between total Axis 4 budget per Member State and share of that budget devoted to Axis 4



N.B.: Poland has been taken out of the graph as its comparatively very large budget renders the graph unreadable. But the fact that Poland also has the lowest share devoted to SSCF of all MS would actually reinforce the negative trend highlighted in this graph.

Comparing the budget share with the share or projects targeted at SSCF confirms Finland and Estonia as lead Member States in the support provided to SSCF through FLAGs, with these two countries devoting the largest share of both their Axis 4 budgets and projects to SSCF. Poland, as mentioned

<sup>10</sup> Transaction costs are defined as those costs associated with an economic transaction. In our context transaction costs can be understood as those costs linked with the time and resources needed to support a SSCF project beyond the actual financial grant (support to project promoter, administrative follow up, ...).



above (see Figure 5) is the last Member State in terms of budget and project share. This is explained by the very large Polish budget (around EUR 250 million representing 35% of the total public budget of Axis 4 for the EU) and the high number of Polish inland FLAG.

### 3.3 Level of financial support 2007-2013 (EFF only)

In order to identify the specific share of the EFF devoted at SSCF from the answers of the survey, we have classified the FLAG population in 3 different groups as these groups benefit from different EFF contribution ceilings<sup>11</sup>:

- FLAGs located in convergence areas with up to 75% of the total public expenditure co-financed by the EFF.
- FLAGs located in non-convergence areas with up to 50% of the total public expenditure co-financed by the EFF.
- FLAGs located in the outlying Greek islands with up to 85% of total expenditure co-financed by the EFF.

We have assumed the maximum co-financing rate has been used for each FLAG in the three different categories and have applied that maximum intervention rate to the estimated total public budget of each FLAG targeted at SSCF which has been calculated using the methodology described under point 0.

This provides us with an estimate of around **EUR 90 000 000 of the EFF budget which has been targeted at SSCF through FLAGs**. This represents a little lower than 19% of the total Axis 4 EFF budget (see Table 10). The share of the EFF Axis 4 budget devoted to SSCF via FLAGs (18,45%) is actually a little lower than the share of total public money targeted at SSCF via FLAGs (19,4% of FLAG total public expenditure), mostly due to very large budget of Polish inland FLAGs which do not harbour SSCF and which benefit from the 75% EFF contribution ceiling.

Table 9: Estimation of the EFF budget available to FLAGs targeted at SSCF

EFF budget spent towards SSCF by sample FLAGs (EUR)	EFF budget spent towards SSCF by FLAGs out of sample (EUR)	Estimated total EFF budget targeted at SSCF in the 2007/2013 period (EUR)	Total Axis 4 EFF budget 2007-2013 (a) (EUR)	Share of SSCF support in Axis 4 EFF budget
37.948.468	<b>52.036.699</b>	<b>89.985.167</b>	<b>487.711.155</b>	18,45%

Sources: (a) DG MARE, October 2015 (Belgium and Netherlands taken out as no FLAGs have answered the survey)

However, as with total public budget, the share of EFF budget devoted to SSCF under Axis 4 increases very much (to around 30% of Axis 4 EFF expenditure) if those FLAGs not harbouring small scale fisheries are taken out of the equation. There are nearly no differences between the share of the total public expenditure targeted at SSCF (29,65%) and the one from the EFF Axis 4 budget (29,76%) in those areas likely to harbour SSCF.

Table 10: Share of EFF Axis 4 budget targeted at SSCF (excluding budget of those FLAG not harbouring SSCF)

A	B	C (A-B)	D	E (D/C)
Total EFF Axis 4 budget 2007-2013 (a) (EUR)	<b>EFF Axis 4 budget of inland FLAGs (PL, LT, LV, RO, DE, BG)</b>	<b>EFF Axis 4 budget of FLAGs likely to harbour SSCF</b>	<b>Estimated EFF Axis 4 budget targeted at SSCF in the 2007/2013 period (EUR)</b>	<b>Share of EFF Axis 4 budget of FLAGs likely to harbour SSCF</b>

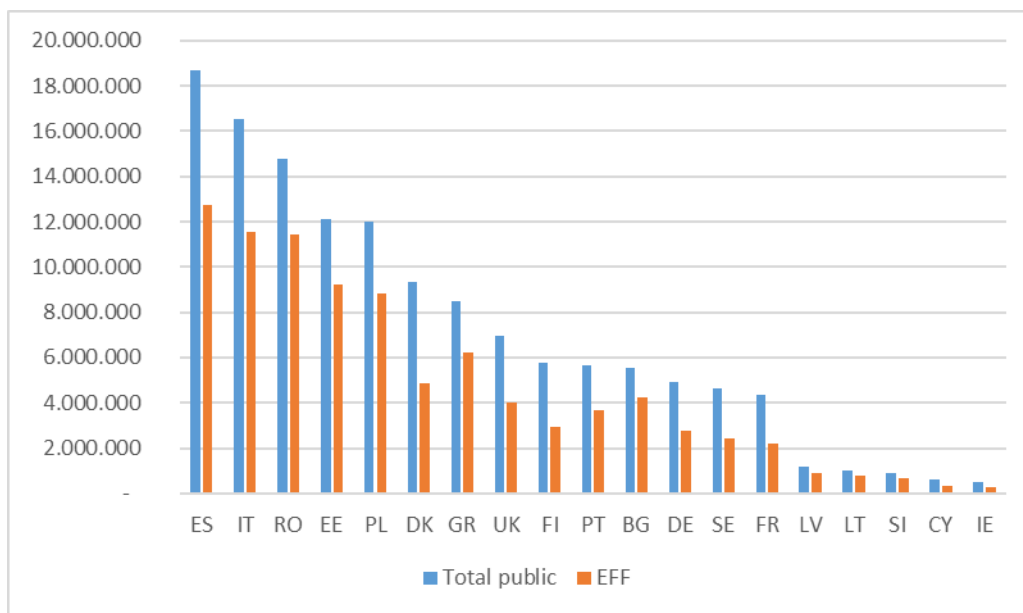
<sup>11</sup> See art.53 of Regulation 1198/2006

<b>487.711.155</b>	185.332.500	302.378.655	89.985.167	29,76%
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Sources: (a) DG MARE, October 2015 (Belgium and Netherlands taken out as no FLAGs have answered the survey)

In terms of individual Member States Axis 4 EFF budgets devoted to SSCF, they range from around EUR 12 million spent in Spain on SSCF via FLAGs to less than EUR 300 000 in Ireland (see Figure 7 below). Changes in rankings in terms of budget devoted to SSCF between total public budget and EFF budgets are mostly influenced by the numbers of FLAGs located in convergence or non-convergence areas in the different Member States. The average EFF contribution rate for SSCF under Axis 4 stands at around 65% of total public expenditure (EUR 90 000 000 EFF out of a total of around EUR 140 000 000 total public money devoted to SSCF as calculated under point 0).

Figure 7: Comparison between the total public budget and EFF budget of Axis 4 targeted at SSCF per Member State



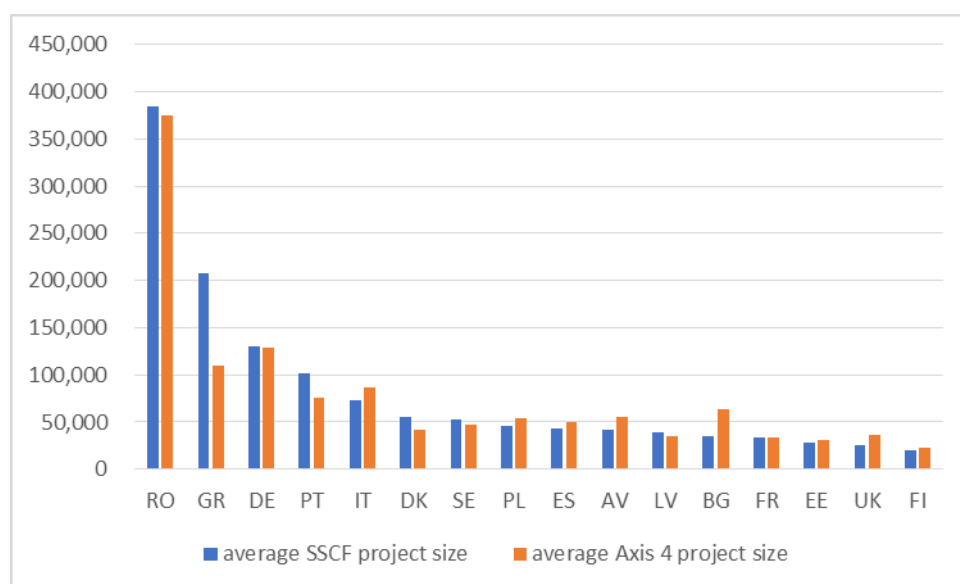
### 3.4 Average project size (EFF)

Looking at the average project size extracted from the sample, the average size of SSCF projects supported by FLAGs amounts to around EUR 41 000 (see Figure 7). This is below the average project size which is reported at a little above EUR 55 000 by surveyed FLAGs<sup>12</sup>. SSCF projects are therefore generally smaller than other types of projects financed by Axis 4. This holds true for FI, UK, EE, FR, BG, ES, IT and PL but not for the other Member States.

The average SSCF project size in Romania and Greece seems however disproportionate and could indicate an issue with the reliability of the data provided by some FLAGs from these countries. Removing them from the calculation brings the average SSCF project size down from EUR 41 000 to around EUR 37 500 while the average project size goes down from EUR 55 000 to EUR 48 000.

<sup>12</sup> This project average of around EUR 55 000 is below the average project size of around EUR 61 000 which can be calculated on the basis of the figures presented in the last Annual Implementation Report on Axis 4 produced by the FSU in May 2015. This means that sample FLAGs had generally smaller types of projects than the rest of the FLAG population but also confirms that SSCF projects are definitely much smaller than the average Axis 4 project.

Figure 8: Comparing average SSCF project size with average project size per Member State



Note: AV=average of the sample

An extrapolation to assess the average size of SSCF projects of the total project population does not make sense for quite a few countries given the low response rate in some MS and the lack of knowledge regarding the rest of the FLAG population and the related level of support towards SSCF.

### 3.5 Relation with SSCF measures of the EFF (article 26 1198/2006)

Information collected on the uptake of the specific measure foreseen under the EFF in support of SSCF (article 26 of Regulation 1198/2006 and related actions under Article 25 and 27) show that the average size of projects in support of SSCF amounts to around EUR 7000, which is much lower than the EUR 40 000 calculated above (see point 0) meaning CLLD has managed to finance larger types of SSCF projects than Art.26. As well, the uptake of the measure under art.26 was mostly limited to a few countries: Italy and Poland make up for around 75% of the operations, followed by Cyprus, Portugal, Estonia and Finland with around 5% each, the UK, France and Sweden sharing the remainder of the projects.

Poland stands out here as this is the only MS which had a high uptake in terms of article 26 while presenting a low share of projects targeted at SSCF under CLLD. This could indicate a strategic decision by Poland to mostly address SSCF through the specific ad hoc EFF measure, while CLLD would be devoted to supporting other types of operations. This should be looked at in the framework of a case study.

Overall, the difference in terms of the uptake between the Art.26 and Axis measures coupled with the higher average budget size of Axis 4 projects than measure 26 projects indicates a greater effectiveness of FLAGs as specific instruments to reach out and support the SSCF sector.

The total budget of the art. 26 measure and related actions under art. 25 and 27 amounted to around EUR 55 million. Adding this figure to the estimated budget of FLAG support to SSCF under Axis 4 (EUR 139 million) brings a total of EUR 194 million devoted to SSCF under the EFF. This figure represents around 5% of EFF total public expenditure (estimated at around EUR 5 billion) but should be considered as a minimum. Indeed, other projects targeted at SSCF were financed under the other measures of the EFF for which no information is available, while the CLLD share specifically devoted to SSCF is also a conservative estimate.

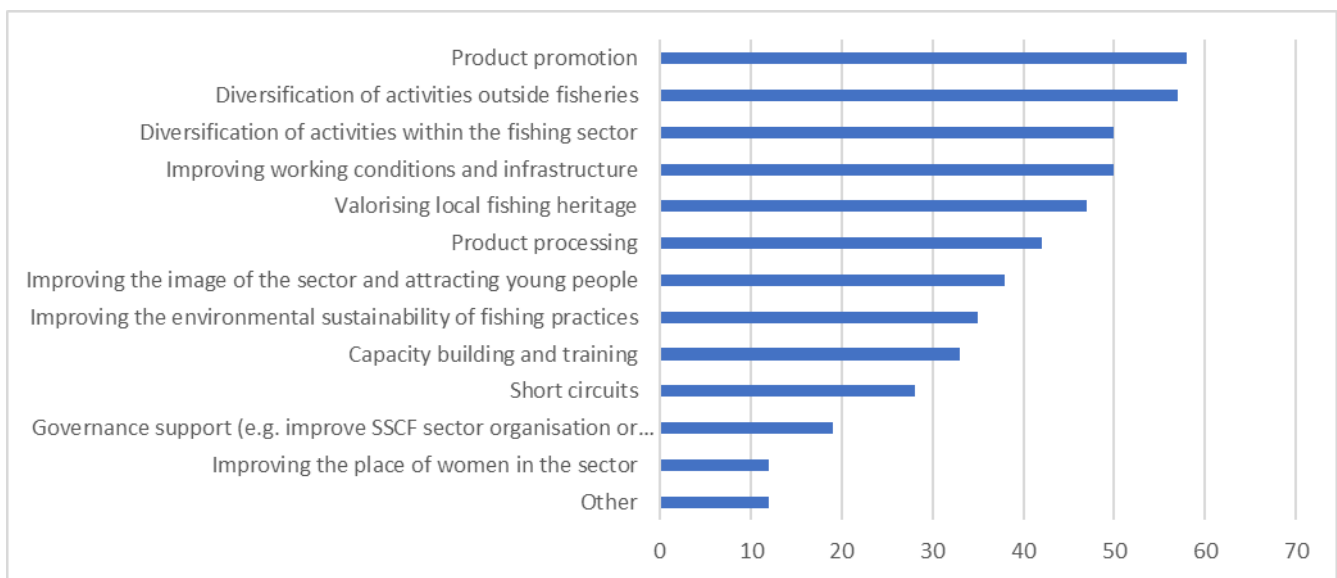
### 3.6 Types of SSCF projects supported by FLAGs in the 2007-2013 period (EFF)

From Figure 8 below, we can see that the types of FLAG projects targeted at SSCF is quite varied. The two more popular categories of projects are those linked with product promotion and support to diversification of activities outside fisheries. Supporting forms of diversification within the sector itself and support to small scale infrastructure and working conditions come not far behind.

The least common projects are those linked with supporting governance of SSCF and improving the place of women in sector. The reasons behind these low figures for these categories of projects should be looked at through the specific case studies.

Ideally, this information should be cross checked with information on the types of FLAGs projects in general to see if there is a specific focus of SSCF projects.

Figure 9: Types of SSCF projects supported by FLAG (# of positive answers per category)



The information about the types of projects is also likely to differ MS by MS as highlighted in the Figure 9 below where the general trend is compared to the situation in Spain. While product promotion remains the first type of project supported, valorising the local fishing heritage has a strong importance for Spanish FLAGs for example.

Figure 10: Comparison of the types of project in Spain and in the overall population

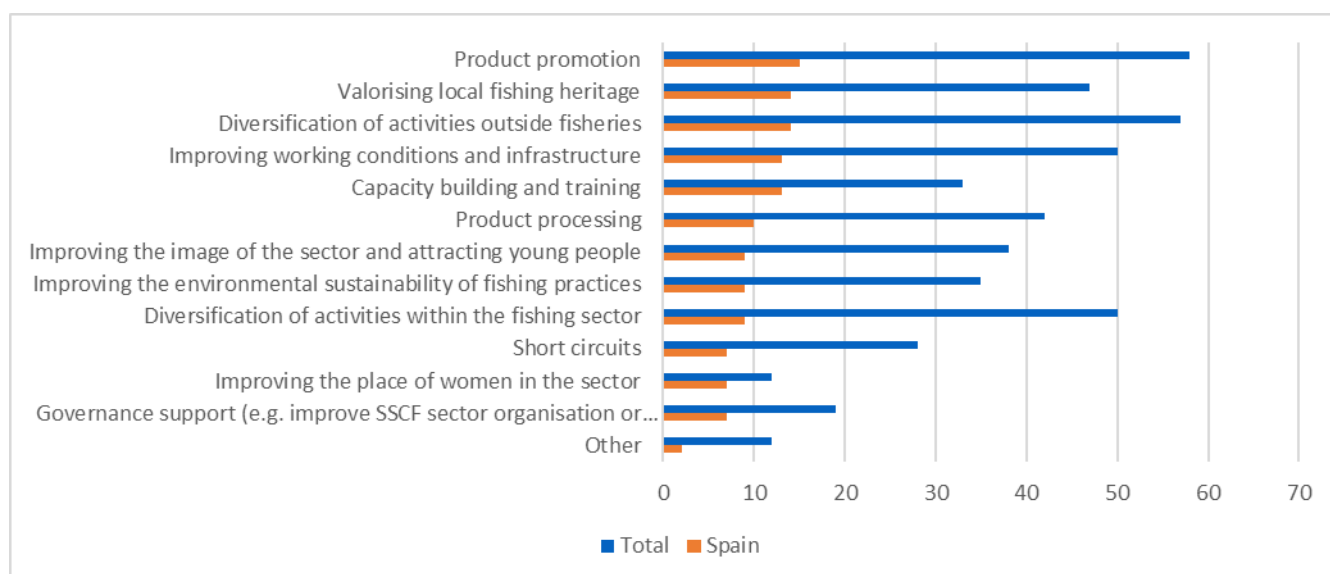


Table 11 below provides further information on the focus of projects in support of SSCF for selected MS<sup>13</sup>. In France, improving the environmental sustainability of fishing practices comes first on equal footing with product promotion. In Italy, the focus is on supporting projects to diversify within the fishing sector while FLAGS in Finland and Germany place an emphasis on improving working conditions and infrastructure. FLAGS in Greece and Poland concentrate on diversification of activities outside the fisheries sector.

Table 11: Focus of projects for selected MS

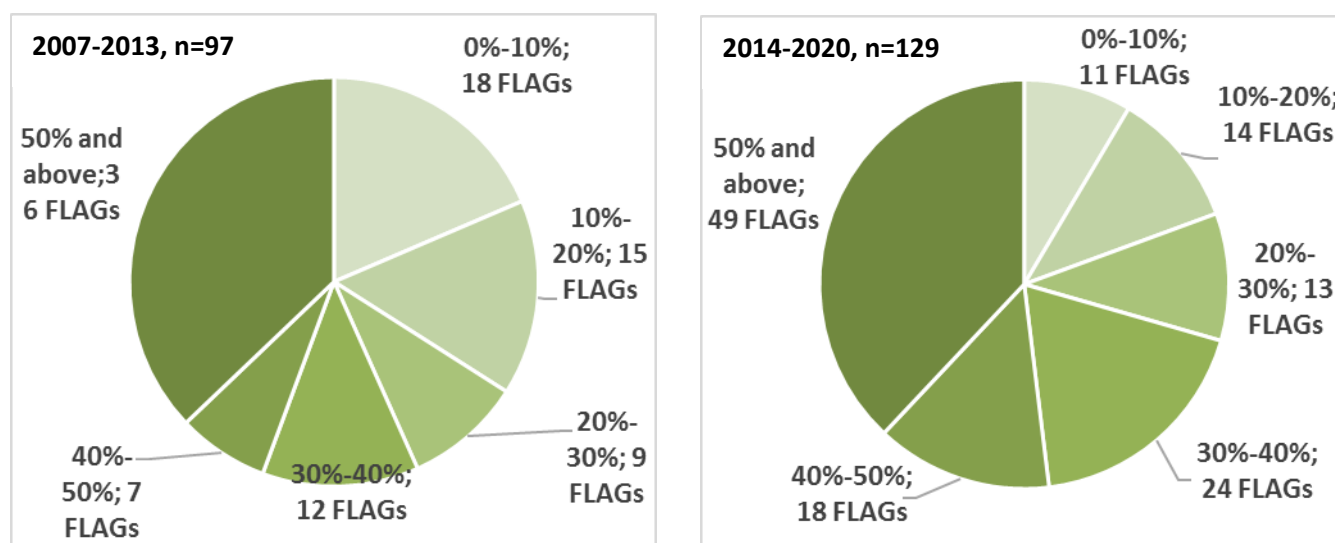
MS	Short circuits	Product processing	Product promotion	Diversification outside fisheries	Diversification within fishing sector	Governance support	Image of the sector/attracting young people	Capacity building and training	Working conditions/infrastructure	Environmental sustainability of fishing practices	Local fishing heritage
DE	3	4	5	2	2	1	3		5	2	5
EE	1	4	1	3	4		2	3	4	2	3
ES	7	10	15	14	9	7	9	13	13	9	14
FI	2	4	5	3	4		5	5	6	3	2
FR	7	3	8	2	5	4	5	2	3	8	4
GR		1	1	7	2		3	1		1	2
IT	4	1	5	4	7	2	3	2	1	2	5
PL	1		1	4	2			1			
UK		3	4	3	3	1	1	3	5	2	3

<sup>13</sup> The number of answers received in some MS do not allow to provide a clear picture on the focus of SSCF projects. These MS are therefore omitted from this table.

### 3.7 Foreseen level of financial support targeted at SSCF in the 2014-2020 period (EMFF)

129 FLAGs have provided an estimate of the share of their total public budget (EMFF + national co-financing) that will be targeted at SSCF in the 2014-2020 period. When comparing the distribution of answers with the situation of the previous period (see Figure 10), we can remark that the overall expected support to SSCF is likely to increase. Indeed, the share of FLAGs stating they will spend more than 30% of their budget on projects targeting SSCF increases to 71% of the FLAGs of the 2014-2020 period (compared to 57% in the period 2007-2013).

Figure 11: Number of answers on share of the budget targeted at SSCF for the 2007-2013 (left) and 2014-2020 (right) periods



Adding to this the fact that the population of FLAGs likely to harbour SSCF increases from 236 (in the period 2007-2013) to 285 in the current period reinforce the hypothesis of a higher share of the total public budget to be targeted at SSCF.

An estimation of the possible budget that FLAGs would devote to supporting SSCF in the 2014-2020 was carried out based on the answers of FLAGs from the survey. This estimation followed the same methodology as described under the point 0 above and amounts to a total of around EUR 210 million (see Table 13 below). This figure should be treated with caution as it is based on an estimate made by FLAG managers on the possible level of support to SSCF which mostly rely on their best knowledge at the time of the survey (February/March 2017). Still it can serve at least to confirm the hypothesis that the budget FLAG will devote to SSCF is likely to increase in this period.

Several elements can corroborate this increased level of financial support targeted at SSCF in the 2014-2020 period:

- The higher number of FLAGs: 358 compared to 312 in the 2007-2013 period.
- The reduced support for inland areas without commercial inland fishing activities in some Member States (Poland, Latvia) coupled with a drastic reduction in CLLD budget in Poland (minus EUR 160 million).
- Increased numbers of FLAGs and overall budget for CLLD in Member States such as Spain, Italy and France which were seen to be supportive of SSCF in the 2007-2013 period.
- The involvement of Croatia (and its important SSCF sector) in the CLLD approach over the whole duration of the programme.

All these elements points in the same direction of a likely increase of support by FLAGS to SSCF. Still the estimate of EUR 210 million represents around 32% of the total public budget devoted to CLLD and therefore a 13% increase in the level of support compared to the period 2007-2013. In absolute terms, this represents an increase of around EUR 70 million. This is a large increase and the estimate should therefore be treated with caution.

Table 12: Total public budget targeted at SSCF and its share of the total public budget for both period

Period	Estimated total public budget targeted at SSCF (EUR)	Share of total public budget	Share of total public budget of FLAGS likely to harbour SSCF
<b>2007-2013 (EFF)</b>	138.814.994	19,4%	29,65%
<b>2014-2020 (EMFF)</b>	212.432.046	32%	43%

The details of the estimates per Member States are provided in Table 13 below.

Table 13: Estimates of budget targeted at SSCF per Member State in the period 2014-2020

MS	# of answers	Response rate total pop.	Response rate of FLAGS with SSCF	Total public budget ('000 EUR)	# of FLAGS foreseen	# of FLAGS with SSCF	Average budget per FLAG ('000 EUR)	Budget dedicated to SSCF per FLAG of the sample ('000 EUR)	Total SSCF budget ('000 EUR)
<b>BG</b>	3	38%	50%	17.859	8	6	2.232	1.228	6.920
<b>CY</b>	1	33%	33%	7.000	3	3	2.333	1.517	4.200
<b>DE</b>	11	38%	61%	24.600	29	18	848	243	4.234
<b>DK</b>	5	50%	50%	8.845	10	10	885	363	3.538
<b>EE</b>	4	50%	50%	27.765	8	8	3.471	2.256	16.659
<b>ES</b>	23	56%	56%	126.675	41	41	3.090	1.552	60.308
<b>FI</b>	8	80%	80%	9.400	10	10	940	576	5.346
<b>FR</b>	11	44%	44%	45.161	25	25	1.806	994	23.402
<b>GR</b>	7	21%	21%	54.118	33	33	1.640	527	17.008
<b>HR</b>	0	0%	0%	22.299	12	12	1.858	-	-
<b>IE</b>	1	14%	14%	12.000	7	7	1.714	1.114	7.200
<b>IT</b>	23	48%	66%	84.860	48	35	1.768	588	20.177
<b>LT</b>	0	0%	0%	12.230	10	4	1.223	-	-
<b>LV</b>	5	83%	83%	15.000	6	6	2.500	525	3.150
<b>PL</b>	7	19%	78%	93.765	36	9	2.605	688	6.195
<b>PT</b>	6	38%	40%	41.176	16	15	2.574	1.029	14.476
<b>RO</b>	3	15%	30%	44.912	20	10	2.246	561	5.614
<b>SE</b>	4	31%	31%	16.687	13	13	1.284	321	4.172
<b>SI</b>	0	0%	0%	6.667	4	1	1.667	-	-
<b>UK</b>	7	37%	37%	18.112	19	19	953	552	9.832
<b>Total</b>	129	-	-	689.130	358	285	-	-	212.432

### 3.8 Additional non-financial types of support

Ninety percent of the FLAGs who answered the survey (140 FLAGs) mention they have provided or envisage to provide other non-financial type of support to SSCF. This confirms the assumption that FLAGs do provide more than financial support to local stakeholders and more specifically to SSCF. The most common types of non-financial type of support FLAG provide are presented in Table 14.

Helping to access other types of funding is clearly a priority for FLAG managers if only to preserve their sometimes limited budget. SSCF operators will also typically struggle with most administrative procedures linked with public funding and FLAG managers are very often solicited for these types of assistance.

Creating linkages between different actors is at the heart of the action of CLLD and it is therefore not surprising to find fostering collaboration between SSF and other stakeholders in a clear second position.

Table 14: Types and share of non-financial support provided by FLAGs to SSCF stakeholders

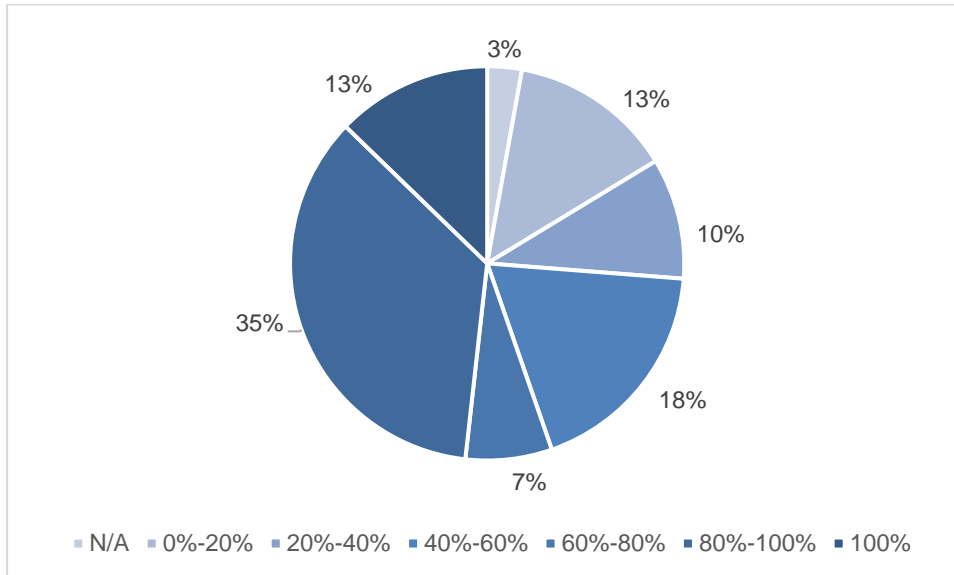
Type of non-financial support	Share of FLAG from the sample who provide/will provide this type of support
Support to access funding from other programmes (e.g. other EMFF measures or other types of subsidies/financial instruments),	75%
Fostering collaboration between SSCF and other stakeholders (i.e. other economic actors, scientists...)	74%
Helping the local SSCF to get better organised	57%
Improving the representativeness of SSCF in public decision making	49%



### 3.9 Importance of SSCF in FLAG areas

FLAGs were asked to indicate the share of fishermen in their areas which could be classified as belonging to the SSCF segment. The Figure 12 highlights that close to half of the respondents of the survey (70 out of 141 FLAGs) indicated that SSCF represented the vast majority of fishermen locally (above 80%).

Figure 12: Distribution of sample FLAGs according to the importance of SSCF locally



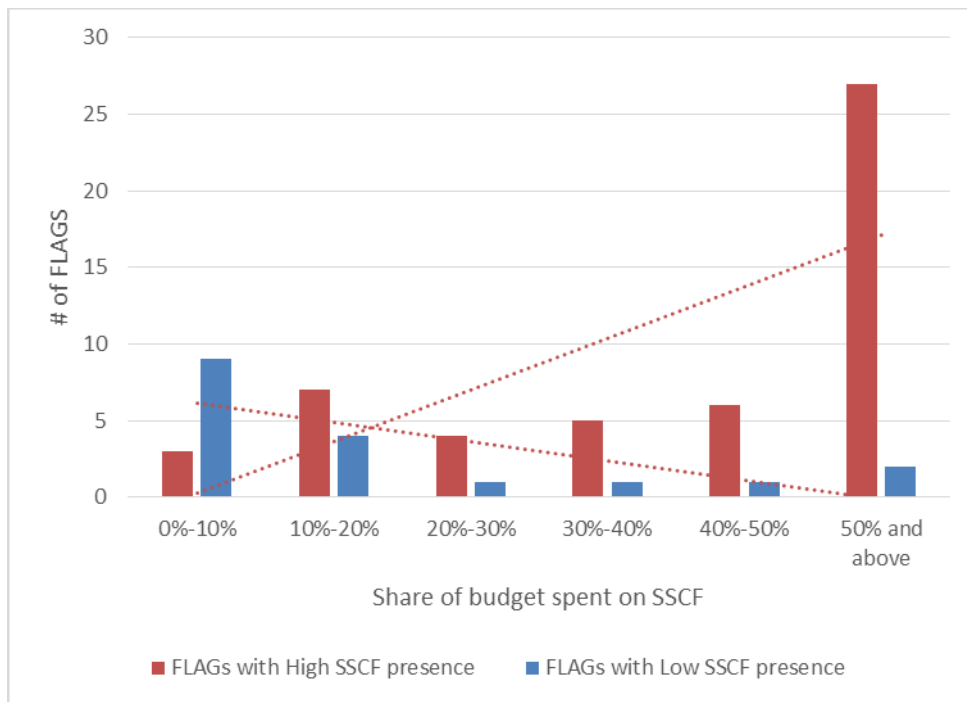
This means that at least 70 FLAGs or around 20% of the total number of FLAGs foreseen in the 2014-2020 period will predominantly work with SSCF. This indicates a clear tendency for FLAGs to be located in areas with strong SSCF presence.

The total number of FLAGs located in areas with a strong SSCF sector is likely to be higher than 70 but extrapolation to the total FLAG population based on the survey is however difficult. Indeed, the high percentage of answers from FLAGs with a strong SSCF representation can indicate a certain level of bias in the sample (those FLAGs working more with SSCF having a higher interest in answering a survey on SSCF for example).

However, as explained above, qualitative knowledge of the FLAG population has allowed us to identify those FLAGs not likely to harbour any SSCF. This leaves us with a population of 285 FLAGs likely to harbour SSCF in the 2014-2020 period. The sample of 141 FLAGs represents around 50% of the population of FLAGs likely to harbour SSCF what reduces the risk of bias. These 70 FLAGs which have mentioned that SSCF represented 80% or above of local fisheries activity actually account for 25% of the population of FLAGs likely to harbour SSCF. In other words, 1 out of 4 FLAGs (which have commercial fishing activities present in their territories) is located in an area of very high SSCF activity.

Looking at the relationship between the share of the budget targeted at SSCF per FLAG and the presence of SSCF in the FLAG territory tells us unsurprisingly that the share of the budget devoted to SSCF increase with the presence of SSCF in the territory (see Figure 13).

Figure 13: Relationship between the share of budget targeted a SSCF per FLAG and the presence of SSCF in the FLAG territory



Still there are some notable exceptions to this rule, with around 10 of FLAGs (from Greece, Germany, Spain, Italy, Sweden, Bulgaria and Ireland) having mentioned being located in a strong SSCF area<sup>14</sup> but only reporting a low to very low level of budget targeted at SSCF (basically reporting having spent between 0 and 20% of their budget on projects targeted at SSCF). There can be different reasons for this situation. For example, it could be the result of a voluntary strategic decision taken by the FLAG / MA to support SSCF through other means than FLAGs but it could also be symptomatic of the difficulties encountered by some FLAGs to successfully engage with SSCF stakeholders. Those assumptions should be looked at through case studies.

<sup>14</sup> A strong SSCF area is here defined as an area where SSCF represent between 80 to 100% of the local fishermen population.

## Annexes

### Annex 1: Definitions used for the survey

**Small-Scale Coastal Fisheries:** “defined as fishing carried out by vessels of less than 12 meters overall and not using towed fishing gear (i.e. trawl and dredges), **but note that, inland fishing by vessels of less than 12 meters overall not using towed gear, on foot fishing and shellfish gathering should also be included in this survey.**”

**Projects targeted at small-scale coastal fisheries** were defined as those which:

- had as project promotor a small-scale coastal fisherman/woman or a SSCF association
- were run by another type of stakeholder (FLAG, municipality...) but were designed to benefit SSCF primarily (e.g. new pontoon or landing facility etc)”

### Annex 2: Questionnaire used for the survey (language versions available upon request)

#### Introduction

*This survey is conducted by the FARNET Support Unit to measure the extent of support provided by FLAGs to **small-scale coastal fisheries** (SSCF) as defined by the EMFF.*

**Please note that the EMFF regulation limits small-scale coastal** fishing as fishing carried out by vessels of less than 12 meters overall and not using towed fishing gear (i.e. trawl and dredges), but that, inland fishing by vessels of less than 12 meters overall not using towed gear, on foot fishing and shellfish gathering should also be included in this survey.

*This survey should not take you more than 5 minutes to fill in, thanks for taking part!*

FLAG name: \_\_\_\_\_

Email: \_\_\_\_\_

Tel.: \_\_\_\_\_

Country: \_\_\_\_\_

Region (for DE, FR, IT, ES): \_\_\_\_\_

Percentage of fishers in your area which can be classified as SSCF (small-scale coastal fishing)

Drop down

- 0%-20%
- 20%-40%
- 40%-60%
- 60%-80%
- 80%-100%
- 100%

You are (tick mutually exclusive options):

- A new FLAG under the EMFF which had no previous access to Axis 4 funding in the EFF before (jump to Question 7)
- A FLAG which was also operational with EFF Axis 4 funding in the 2007-2013 period (go to Question 1)

Provide below any information or link to available documentation about the small-scale coastal fisheries sector in your area, you would like to mention  
- (open box)

1. Total number of local projects funded by your FLAG during the 2007-2013 period: \_\_\_\_\_

2. Number of those local projects targeted at small-scale coastal fisheries during the 2007-2013 period:  
\_\_\_\_\_

*NOTE: Projects targeted at small-scale coastal fisheries could be defined as those which:*

- *had as project promotor a small-scale coastal fisherman/woman or a SSCF association*
- *were run by another type of stakeholder (FLAG, municipality...) but were designed to benefit SSCF primarily (e.g. new pontoon or landing facility etc)*

3. Total public budget (EFF + national/regional co-financing) spent by your FLAG during the 2007-2013 period: €\_\_\_\_\_

4. Share of the total public budget spent by your FLAG during the 2007-2013 period on projects targeted at **small-scale coastal fisheries**:

Dropdown:

- 0%-10%
- 10%-20%
- 20%-30%
- 30%-40%
- 40%-50%
- 50% and above

5. Types of projects funded by your FLAG in support of small-scale coastal fisheries

(tick all relevant options):

- Short circuits
- Product processing
- Product promotion
- Diversification of activities outside fisheries
- Diversification of activities within the fishing sector
- Governance support (e.g. improve SSCF sector organisation or representativeness)
- Improving the image of the sector and attracting young people
- Capacity building and training
- Improving working conditions and infrastructure
- Improving the place of women in the sector
- Improving the environmental sustainability of fishing practices
- Valorising local fishing heritage
- Other, please specify

Box max. 5 lines

-

6. Describe in a few lines one of the most successful projects your FLAG has financed to support SSCF (please state the objective of the project, its results and the key stakeholders involved)

Box max. 5 lines

-

7. Estimated share of your FLAG budget (total public budget i.e. EMFF + national/regional co-financing) that will be targeted at small-scale coastal fisheries in the 2014-2020 period:

Dropdown:

- 0%-10%
- 10%-20%
- 20%-30%
- 30%-40%
- 40%-50%
- 50% and above

*NOTE: Projects targeted at small-scale coastal fisheries could be defined as those which:*

- *had as project promotor a small-scale coastal fisherman/woman or a SSCF association*
- *were run by another type of stakeholder (FLAG, municipality...) but were designed to benefit SSCF primarily (e.g. new pontoon or landing facility etc)*

8. As a FLAG, do you provide or envisage providing other, non-financial types of support to your small-scale coastal fishing sector? Please tick the relevant types of support:

- Support to access funding from other programmes (e.g. other EMFF measures or other types of subsidies/financial instruments)
- Helping the local SSCF to get better organised
- Improving the representativeness of SSCF in public decision making
- Fostering collaboration between SSCF and other stakeholders (i.e. other economic actors, scientists...)
- Other (please describe in box below)

Box max. 5 lines

-

*Thank you very much for taking part in this survey, your time is very much appreciated. The information generated will be used by the FARNET support unit through its various publications.*

*Please tick this box if you want to be informed about the results of this survey*